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OPEN STRATEGY INTERMEDIARIES? A FRAMEWORK FOR UNDERSTANDING THE ROLE OF FACILITATORS IN OPEN STRATEGY-MAKING

Research in Progress

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Abstract

Open strategy is an emerging phenomenon, and has received significant interest by researchers in both information systems (IS) and strategy fields. The term open strategy represents how strategy-making is becoming a more inclusive and transparent process in organizations, often enabled by information technology (IT). Despite the notable attention paid to the role of IT in the facilitation of open strategy, those practitioners who are also central in such socio-technical processes of change have received scant attention to date by scholars. This paper therefore seeks to examine the role of facilitators in IT-driven open strategy. We term these ‘open strategy intermediaries’. Using a strategy-as-practice lens and drawing on several empirical cases of IT-driven open ‘strategizing’, the article highlights six emerging practices by open strategy intermediaries which we call: (i) Initiation, (ii) Provision, (iii) Infrastructure and design, (iv) Promotion and communication, (v) Mediation and moderation, and (vi) Strategy analysis and development. In concluding the paper, we detail how we intend to continue the research evident in this ongoing work.

Keywords: Open strategy; intermediaries; facilitation; IT-enabledness; practice theory

1 Introduction

IT-enabled ‘open’ phenomena have attracted wide interest by information systems (IS) scholars (Whelan et al., 2014; Schlagwein et al., 2017). This has encompassed publications exploring openness in strategy-making, including in journal special issues (e.g. Baptista et al., 2017) and conferences such as ECIS tracks examining Openness and IT (e.g. Tavakoli et al., 2016; Dobusch et al., 2017). There has been particular focus on how information technology (IT) can facilitate involvement of a wider range of stakeholders in the generation of strategic content (Chesbrough and Appleyard, 2007), and in the practice of strategy (Whittington et al., 2011). Examples include use of strategy wikis (Dobusch and Kapeller, 2017) and social media (Baptista et al., 2017) for including stakeholders in strategy processes. Additionally, IT is being used in organizations to communicate and make the strategy process transparent (Gegenhuber and Dobusch, 2017). This phenomenon has been labelled ‘open strategy’ or ‘open strategizing’ (e.g. Doz and Kosonen, 2008; Tavakoli et al., 2017) to reflect the IT-driven shift in how strategies are developed in organizations.

The majority of open strategy research has focused on emphasizing different forms of openness and the actors included in them (Amrollahi & Rowlands, 2017; Morton et al., 2017). In interrogating open strategy, researchers have drawn on practice-theoretical work to help conceptualize openness, and identify specific open strategizing practices in the accomplishment of strategy-making over time (Tavakoli et al., 2017). Emphasis has been centred on potential practices relating to inclusion of both internal and external stakeholders in open strategy, and to analyze how they contribute towards strate-

gy-making through their engagement in strategy praxis. By contrast, little detailed focus has been placed on the (usually external) actors involved in facilitating open strategy in organizations, who enable means by which erstwhile non-strategists can be exposed to strategic contents, and can engage with strategy-making (Morton et al., 2016a). Facilitation and intermediaries of openness in strategy are notable in the literature, and are an important consideration alongside IT in socio-technical change processes such as those of central interest in open strategy work. This includes Bridgespan's facilitation of Wikimedia's strategy Wiki (Newstead and Lanzerotti, 2010), IBM's Jamming events (e.g. Whittington, 2011), and Salesforce's enablement of open strategic discussions at Unilever (Lombardi, 2014). Despite these cases, those practitioners who are active in enabling such facilitation have been largely ignored and little is known about the intricacies of their role in open strategy.

We use this lack of attention paid to those who facilitate openness in strategy as the main motivation for our research, and aim to highlight the practices of facilitators at a more intimate level (Whittington, 2014), as has been demonstrated in wider, practice-based strategy research (e.g. Hendry and Seidl, 2003). We use a practice-theoretical perspective, echoing recent calls to adopt such a lens to explore the use of technologies and the entanglement of social and material in strategizing, focusing more in-depth on specific practitioners and practices (Peppard et al., 2014; Whittington, 2014). Our analysis was guided by the following research question:

RQ. "What is the role of facilitators and their IT-driven practices in open strategy-making in organizations?"

Our initial findings are conceptualized in a framework which demonstrates their role in episodes of strategy praxis. The rest of this paper is structured as follows. In the next two sections, we further emphasize the empirical context of this research-in-progress (open strategy and facilitation), and provide an overview of the theoretical background and rationale for adopting a practice-theoretical perspective. We then explain the research methodology, introducing our empirical cases, including an outline of data collection and analysis. The main analysis then follows, using the practice lens to interrogate the role of intermediaries in open strategy. The final sections outline a (preliminary) framework for understanding the role of intermediaries as the main contribution of this paper, before concluding and highlighting an outlook on our future work.

2 Open Strategy and Facilitation

Research examining the phenomenon of open strategy has emphasized a number of non-technological and IT driven practices which enable greater participation in strategy-making (Amrollahi & Rowlands, 2016; Baptista et al., 2017). In contrast to the more traditional view of strategy being the exclusive role of the corporate elite (Clegg et al., 2004), theories of open strategy to date have primarily illuminated notions of internal (e.g. staff, partners, shareholders) and external (e.g. customers, clients, members) stakeholders involved in strategic inclusion (actively including more people in strategy ideation and/or implementation) and transparency (allowing more people to access strategic content, insights and information) (Whittington et al., 2011). This has been coupled with explication of the central role of IT in driving openness in strategy (Tavakoli et al., 2015) and examination of the episodic nature of open strategy praxis (Morton et al., 2016b; Tavakoli et al., 2017).

Research illuminating such episodes emphasize that open strategy initiatives are typically formally-structured, and time-limited in nature, focusing on achievement of specific goals such as strategic ideation or communication of strategy (Tavakoli et al., 2015). Thus, IT-driven forms of open strategizing are substantively different from established collective notions of who practices strategy and how (Matzler et al., 2014). These insights resonate closely with broader research in the IS field, where researchers have taken particular notice to how different forms of IT enable and drive openness (e.g. Feller and Fitzgerald, 2000; Whelan et al., 2014). This also stems from a motivation to understand how material and social actors are embedded in enabling new forms of inter-intra organizational communication and collaboration, with firms demonstrating new forms of openness; tapping the collective 'wisdom of the crowd' (Surowiecki, 2004) and exploiting alternative sources of knowledge (Chesbrough, 2003; Benkler, 2006).

Despite IT being central to open strategy as a social phenomenon, there has been limited in-depth commentary about how IT is embedded in open strategy processes by those who facilitate open strategy-making. More traditional strategy literature has also long discussed the role of consultants or facilitators in the strategic practices of an organization (Pettigrew, 1985). This revives debate around the role that distinct internal and external agents have in strategy-making, and how collaborating with these can be used as a way of facilitating the generation of higher-level discourse, through separation of strategic practice from mainstream organizational structures (Hendry and Seidl, 2003).

Within strategic practice, for example, Hendry and Seidl (2003, p.185) refer to the role of facilitators in “strategic episodes” as “outsiders”, who “bring with them new discursive structures and, through their presence and involvement, disrupt and replace the organizational structures of hierarchy and communication”. Research exploring those who facilitate similar knowledge intensive processes as both internal and external stakeholders has also been common in arenas such as technological change (Rosenberg, 1982), user innovation (Von Hippel, 1988) and more recently open innovation (Chesbrough, 2003). This rich literature describes and analyses the role of intermediaries primarily as third parties mediating between firms and their key stakeholders (Kuenne et al., 2013). Intermediaries (e.g. strategy/technology consultants, IT teams), connecting actors with different sources of knowledge and ideas, is a central consideration in open strategy. In strategy processes, intermediaries can open-up new forms of strategic dialogue between management (e.g. CEO, top management teams) and other internal and external stakeholders (e.g. staff and/or customers) (Whittington et al., 2011). Specific examples of intermediaries of open strategy in the literature, such as the aforementioned examples of Bridgespan and Wikimedia (Newstead and Lanzerotti, 2010), IBM Jamming (e.g. Whittington, 2011), and Salesforce and Unilever (Lombardi, 2014) fail to go beyond mentioning these groups and little is known about the intricacies of their role in practice. We use the core empirical contribution of this paper to address the lack of explicit focus on intermediaries and their entanglement with material artifacts in enabling open strategy-making to occur. A central focus here is thus on social and IT facilitation practices in the open strategy process.

3 Practice Theory

We draw on practice theory, specifically the strategy-as-practice (SaP) literature, in this paper to understand the role of intermediaries in open strategy. This is useful here in identifying specific *practices* by those *practitioners* who facilitate open strategy-making in episodes of *praxis* over time.

The approaches connected with the SaP approach conceptualize strategy as a situated, socially accomplished activity constructed through interactions of many actors (Jarzabkowski, 2010). Thus, strategy is not understood as a fixed property of an organization (something they have), it is something organizational actors do. The SaP approach switches focus to a micro-level analysis of the strategy phenomenon. The SaP lens emphasizes the importance of narrowing the focus to the study of praxis, practices and practitioners. These three individual elements help us to explain the phenomenon of open strategizing activity; that is the people strategizing or ‘doing’ strategy (strategy practitioners), the strategy tools/artifacts and practices used to do strategy (practices) and the actual stream of activity in which strategy is accomplished over time (praxis) (Jarzabkowski, 2010).

Although open strategy has been closely linked with the practice perspective of strategy (e.g. Whittington et al., 2011), there have been few studies focusing on specific, tightly defined ‘episodes’ of open strategizing. Wider strategy literature has, on the other hand, adopted a more in-depth focus on practices and practitioners in different forms of strategy praxis, for example strategy meetings (Jarzabkowski and Seidl, 2008), and the strategic use of PowerPoint (Kaplan, 2011). Whilst a traditional focus in strategy practice work has been on humanistic stances (Jarzabkowski, 2010), there have been increasing calls for strategy to adopt a sociomaterial perspective, where the social and the material are not considered as separate, but as an entanglement constituting and shaping strategy practices (Orlikowski, 2010; Whittington, 2014). This is the stance adopted in our work, and in this paper the SaP framework is central to bounding intermediaries as practitioners of open strategy and understanding their practices in distinct episodes of open strategy-making over time.

4 Research Method

We adopted a research approach relevant for examining a complex and emerging phenomenon like open strategy. Instead of assuming a rigid external meaning and building theory disconnected from the lived experience, an interpretive approach gives voice to those directly involved, and the researcher's interpretation of events (Myers, 2013). Our research-in-progress is based on data collected in 13 organizations, explored for their relevance to the phenomenon at hand; in particular the involvement of facilitators in enabling openness in strategy-making (see Table 1, names of organizations and intermediaries have been anonymized where appropriate). We decided that bounding our research as in-depth, case studies (Miles and Huberman, 1994) would be beneficial considering our high-level access to organizations and the different channels available for data collection within episodes of strategy praxis (Tavakoli et al., 2017). We selected our cases based on their relevance to the phenomenon at hand (open strategy and facilitation) and also their use of IT, to provide a rich overview of strategy practices in the process of strategy-making (Kouame and Langley, 2017).

The selected research method combines a number of data collection techniques. The primary mode of data collection was semi-structured interviews with intermediaries to interrogate their role in open strategy processes. We also interviewed strategy planners, such as members of top management teams, for their insight into facilitation, e.g. why they chose to use intermediaries to facilitate open strategy, what the facilitation process involved. Due to the ongoing nature of this work some of our interviews with case organizations have not yet been conducted, although a total of 41 have been completed to date. We also had privileged access to various IT platforms used, primarily for ideation in open strategy, in several of our cases (e.g. online surveys, online platforms, online discussion groups, online ideation forums), in addition to the data held within. Where possible, we were granted opportunity to 'observe' these platforms being used in real-time through netnography approaches to understanding social interaction on IT platforms (Kozinets, 2015). These primary forms of data were coupled with secondary data, such as planning and analysis documentation relating to open strategy (e.g. marketing materials, draft and final strategic plans, meeting agendas, board meeting minutes).

Case organization	Overview of open strategy-making and intermediary	Associated data (primary and secondary)
Coventry City Council	A strategy Jamming event focused on smart cities. Facilitated externally by IBM.	1 semi-structured interview, planning and analysis documentation.
EU and NATO	A strategy Jamming event focused on strategy for security policy. Facilitated externally by IBM.	2 semi-structured interviews, planning and analysis documentation.
Griffith University	An online forum for strategic idea submission and idea refinement. Facilitated externally by researchers.	1 semi-structured interview, action research based observation notes. Access to open strategy forum platform.
Hampshire County Council	An open strategy consultation regarding the council's future services. Facilitated externally by Opinion Research Services.	1 semi-structured interview, access to online questionnaire data, planning and analysis documentation.
IBM	A series of strategy Jamming events, discussing strategy across levels. Facilitated by internal Jamming team.	2 semi-structured interviews, data from internal platforms, planning and analysis documentation.
Oxfam	A strategy consultation focused on new CEO and strategic direction. Facilitated externally by OpenConsulting.	1 semi-structured interview, planning and analysis documentation.
U3A North Gold Coast	An online forum for strategic idea generation and refinement. Facilitated externally by researchers.	8 semi-structured interviews. Access to the online ideas platform.
UK-based Professional	A two-hour Twitter strategy discussion	4 semi-structured interviews, 1655

Body	event with the CEO, as part of a wider open strategy consultation. Facilitated externally by an independent professional interest group.	Tweets captured relating to open strategy discussion, planning and analysis documentation.
UK Government Defence Organization	A strategy Jamming event to discuss strategic direction with employees. Facilitated externally by IBM.	2 semi-structured interviews, access to IBM Jamming platforms, planning and analysis documentation.
UK Public Research University	A strategy consultation focused on learning and teaching strategies. Facilitated internally by IT and project group teams.	1 semi-structured interview, planning and analysis documentation.
Vienna Tourist Board	A strategy ideas forum aimed at developing a new tourism strategy. Facilitated externally by Innofocus.	1 semi-structured interview, access to online ideas platform, planning and analysis documentation.
Wikimedia UK	An open strategy consultation to devise a new strategic plan. Facilitated internally and externally by Wikimedia staff and volunteers.	1 semi-structured interview, access to online strategy wiki, planning and analysis documentation.
Xamin Open Source Project	An online forum for strategic idea generation and refinement. Facilitated externally by researchers.	16 semi-structured interviews. Access to the online ideas platform.

Table 1. Overview of case organizations and data collected to date

The analytical procedure followed the approach of Miles and Huberman (1994), as frequently used practice-theoretical studies (e.g. Balogun, 2004; Jarzabkowski et al., 2007). This approach was consistent with practice-theoretical research's aim of achieving rich understanding of individuals and IT involved in everyday strategizing activity. The analysis consisted of three central activities: data reduction, data display, and conclusion drawing and verification and is suited to an inductive approach to analyzing qualitative data (Miles and Huberman, 1994). We also added a fourth activity - comparison with theory- helping align emerging findings and conclusions with current theories (Balogun, 2004; Myers, 2013). The three activities of the data display and analysis method translated into a number of stages in the analysis process for this research.

The first stage involved early-stage analysis and reduction of the interview and observation data by the authors, mostly through referring to memos, and by producing first-cycle codes from sentences and paragraphs within interview transcripts to capture richness (Saldana, 2009). The second stage built on the progress made in the early-stage analysis, and involved detailed coding and mapping the IT strategizing activity and entanglement of participants and IT through development of rich narratives (Langley, 1999). Detailed coding was continued in Nvivo software, with first-cycle codes refined through second-cycle coding to develop a greater sense of categorical organization of data relating to intermediaries. Categorization was based on both the research focus outlined, and the guiding practice-theoretical lens, emphasizing the entanglement of intermediaries and IT, and their practices in strategy praxis. Subsequent themes were developed inductively, and to ensure dependability and inter-coder reliability, the narratives and meanings of the themes were negotiated and then grouped into six specific practices.

Stage three consisted of further developing the narratives in relation to the findings with the aim of understanding intermediaries and IT, and related practices as more distinct groupings (Whittington, 2006). This involved grouping identified strategy practices into praxis episodes as broad and finalized themes (Tavakoli et al., 2017), and conceptualizing these as a framework as the main contribution of this paper. This meant that the output could be summarized, emphasizing the principle episodes of open strategy. Stage four was key to grouping the previous stages and drawing preliminary conclusions. Briefly discussing initial outcomes of the work in relation to extant theory and practical implications was central here (Myers, 2013).

To ensure validity and reliability in our work, and justify a qualitative approach, we integrated a number of considerations into our analysis using the framework by Guba and Lincoln (1985). Specific techniques included triangulation for establishing credibility, thick description to ensure transferability, multiple stages and researchers involved in coding to aid dependability, and having clear stages in the analysis to provide an empirical audit trail (Guba and Lincoln, 1985).

5 Preliminary Empirical Findings

In this section, we briefly introduce and outline preliminary findings in relation to the research question for our study. In doing so, we identify six practices through the entanglement of intermediaries and IT in open strategy-making (see table 2). The occurrence of these practices has so far varied in exploration of our cases, demonstrating that the role of intermediaries and IT might rely more on a selection of these in different stages of strategy-making, and that equally these might overlap and have different significance across contexts. Insight into different practices within the process of strategy-making in different organizational contexts is important for advancing practice-based strategy work, again as is a consideration for our range of case selection here (Kouame and Langley, 2017).

Practice identified	Description	Examples
Initiation	Discuss open approaches to strategy with managers.	Meetings to market use of open approach, discussions regarding rationale for open strategy and needs of the organization.
Provision	To provide the required information for strategic planning.	Conduct market research, competitive analysis, market trends, and understand corporate identity.
Infrastructure and design	Design/select the required IT infrastructure for open strategy. Design a sequence of activities required for strategy-making.	Design online platforms, devise processes for engagement, ideation and refinement, and reflection.
Promotion and communication	Communicate with stakeholders about the purpose of an open strategy approach.	Workshops about initiatives, updating stakeholders about progress.
Mediation and moderation	Actively host/run open discussions and moderate where appropriate.	Manage infrastructure, create trust, and ensure diversity of participation and ideas.
Strategy analysis and development	Help managers to develop strategic plans based on submitted ideas.	Analyze and review strategic ideas and content, and develop strategic plans based on these.

Table 2. *Identified practices of open strategy intermediaries with illustrative examples from analysis of data*

The first two identified practices relate to the initiation and provision of information for open strategy, whereby intermediaries were involved in early stage discussions with organizations and their top management regarding the potential benefits of using open strategy approaches. Here, intermediaries demonstrated marketing of their own approaches and potential IT platforms for use in open strategy-making, and also discussed rationale and needs of the organization to understand best options for proceeding with an open strategy approach. For example, in the case of Oxfam the intermediary worked closely with the organization to understand their needs, market, and to discuss available solutions for use in open strategy.

The next practice identified related to appropriate infrastructure (e.g. IT platforms) being selected and/or designed for use in open strategy. Here, intermediaries were involved in designing how strategy-making would occur as a distinct sequence of events. For example, the intermediary for the Vienna

Tourist Board's strategy initiative worked closely to ensure a suitable IT platform was designed and process outlined to fit their needs and corporate identity.

The next practice identified related broadly to the active promotion of open strategy activity. For example, in the IBM strategy Jamming events the promotion was a central part of the process, to ensure maximum participation on the Jamming platforms provided. In the case of the UK-based Professional Body Twitter strategy discussion, the intermediary was central in providing articles and 'Tweeting' information about the event in advance of it commencing.

The practice of mediation and moderation related to the main undertaking of open strategy-making. Here, intermediaries and IT interacted to directly communicate with participants in open strategy as a means of mediating the process to enable conversations between key stakeholders involved. It was also important in some cases for intermediaries to moderate on platforms, afforded by features of IT, and help guide conversations and move participants through different sequences of strategy-making. This was the most common practice by intermediaries, present across all of our cases.

The final practice relates more explicitly to stages of strategy analysis and implementation, where strategic ideas were analyzed towards realized strategy outputs (e.g. strategic plans, implementation of new programmes). Here intermediaries and IT were found to be an essential part of strategy 'sense-making' and potential implementation. For example, in Hampshire Council's open strategy consultation the intermediary and IT had a clear role in analysis to outline and report the opinions and arguments of those who responded to the consultation.

In sum, we have concisely introduced six notable practices in our preliminary findings here.

6 Discussion and Framework: The Role of Open Strategy Intermediaries

In discussing the main findings identified in our preliminary analysis, and structuring these in a framework, we draw on extant theory which has illuminated IT-driven stages of open strategy (Tavakoli et al., 2015; 2017). The developed framework is particularly beneficial for use as a lens to display the stages in which intermediaries might be present in open strategy-making when considering our data collected to date. The proposed framework aligns our outlined practices of intermediaries into three established episodes of open strategizing, and offers a more holistic picture of their role in open strategy facilitation. Figure 1 shows these core points, conceptualized according to the three main episodes of: (i) preparing and planning, (ii) generating and synthesizing, and (iii) communicating and implementing (Tavakoli et al., 2017).

To summarise in relation to our framework, the practices of initiation, provision, and infrastructure and design were related to the praxis episode of preparing and planning, where intermediaries were particularly central to ensuring organizations had an appropriate plan for open strategy, and a process and platform(s) to do so. The practice of promotion and communication was also significant in this episode, but also continued throughout generating and synthesizing. Here, intermediaries were central to ensuring participation and providing clear understanding about the purpose of strategy initiatives.

The practice of mediation and moderation was the primary concern in this second episode, where intermediaries were essential in ensuring a smooth process of discussion and knowledge sharing as part of open strategy-making. Moderation was particularly important to ensure conversations stayed focused and IT platforms were working as required. Finally, through the identified practice of strategy analysis and development, intermediaries were central in helping organizations make sense of the conversations and information developed during open strategy-making. This included providing detailed statistics, visuals and reports, and in some cases providing further support with continued implementation of key strategic priorities highlighted in initiatives.

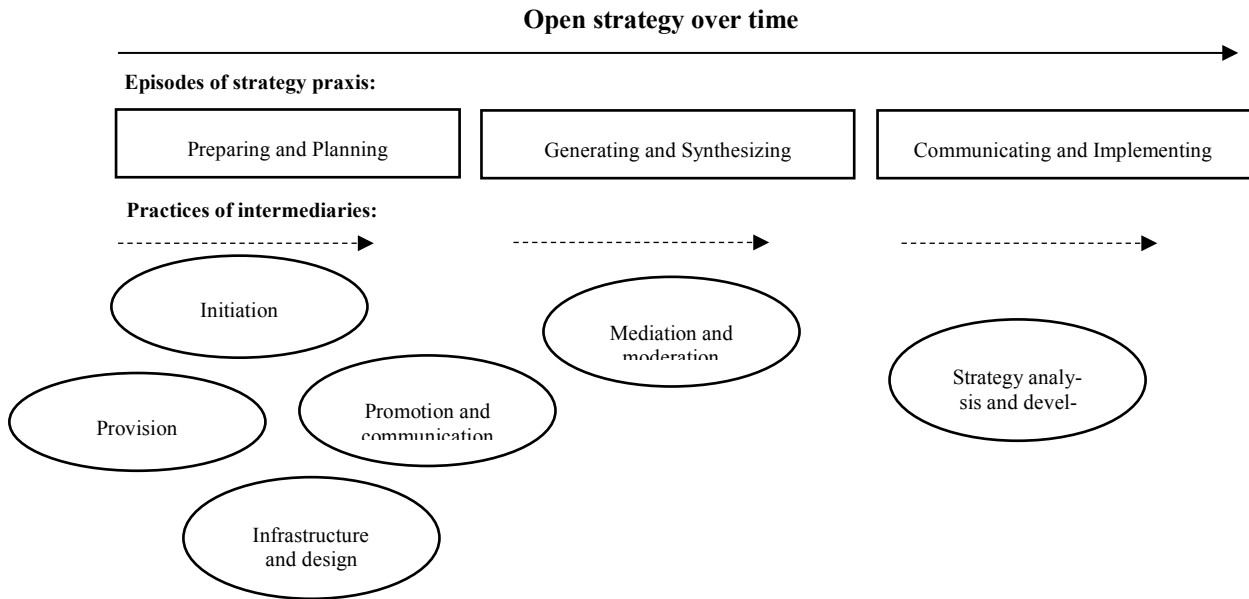


Figure 1. The role of open strategy intermediaries in episodes of strategy praxis

Our preliminary analysis here not only conceptualizes the practices central to the role of intermediaries in open strategy, it also emphasizes where these groups and individuals are situated in the practice of open strategy over time, and alludes to the entanglement between the social and material in strategy praxis. To our knowledge, no other study has formally identified open strategy intermediaries, or positioned their practices in established episodes of open strategy. Overall, the conceptualization is useful in accentuating the relevance of intermediaries by emphasizing their significant role in the facilitation of open strategy-making. Illumination of preliminary findings leads to our conclusion, and how we intend to develop this research area towards a more substantiated contribution long-term.

7 Conclusion and Future Research

This ongoing research has started to uncover the role of intermediaries and IT, through their strategizing practices in open strategy-making. We contribute to open strategy and IS literature by bringing to light the significance of these facilitators in open strategy, whilst emphasizing how the entanglement of social actors and IT is central to their emerging role and associated strategic practices. We build on a notable gap in previous open strategy studies to deepen the level of analysis in relation to these important practitioners and IT (Morton et al., 2016a), and argue that they warrant closer attention in the development of this growing area of research. Whilst this is suitable for this research-in-progress, we also recognize the need to build on this and carve out a more substantiated contribution arising from our work, and insights into the role of intermediaries, in the future.

In progressing this research, we intend to further deepen our analysis, and ultimately use these emerging insights about the role of intermediaries in open strategy to inform further data collection, and potential identification of further practices. We will likely narrow the number of cases to ensure balance and focus on quality of data, and focus more on creating a process model which links strategy practices with actual outcomes of strategy relevant to IS and strategic management theory, as is important in practice-based work (Kouame and Langley, 2017). We also plan to improve the developed framework by integrating more of our data obtained from exploring practices of open strategy, and show in more detail the prominence of practices in each episode. It is also notable that this early version of the research is primarily aimed at an academic audience, and we plan to improve the implications of this research for practitioners in the future. This will help ensure our study provides a more explicit, detailed account of how open strategy is enacted, including by those who might be active or interested in mediating such processes.

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