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A Store Manager's Account of his Company Strategy; a Pilot Study

Dissertation

Master of Research

(Management and Business))

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Abstract

A growing number of scholars in the strategic management field adopt a humanised approach to research via studying strategists and their strategising activities. However, most research is still centred on middle and top management. The pilot study described here illustrates the importance of looking at strategising among first line managers who are becoming increasingly active strategists in certain modern organisational structures.

Besides serving as a pilot study for future piece of research, this study attempts to explore how a retail outlet manager perceived his organisational strategy. It also looks at the connection between some of his daily activities and the company's strategy. This was achieved with a single case study design and analysis of data set produced from observing weekly meetings and interviewing the manager.

This pilot study indicates that the store manager sees two strategies within his organisations - an overall strategy and a localised version of that strategy. Further, he is unaware of his strategic agency and that communication is an important part of strategising. These findings support the need for more studies on strategists and strategising activities and confirm the rationale for conducting a full-scale research using a comparative case study approach.

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1 Aims and objectives

1.1 Introduction

A senior controller at a large company's headquarters, who can be considered a 'strategist', was puzzled by a request from one of the company's division, Bower and Gilbert (2007) report. The request was for, and only for, a large chimney. The controller decided to fly over to investigate the request. To his surprise, he discovered that the chimney was the last piece needed for a whole new factory. He also found out that the division manager had been trying to get corporate approval to build a new factory quickly. Frustrated by the routine and tired from convincing the headquarters with her urgent need to grow the business, the manager succeeded to set up the whole site by dividing it into small chunks so that she did not need headquarters approval. The chimney, however, was the only thing that she could not break down to smaller orders. Who is the strategist in this story; the authors ask, and how can we justify many books teaching MBA students that strategy is the work of CEO's, board members and planning divisions?

The researcher's previous experience helped formulate the research questions. Ten years of experience in the industry, three of which as a junior manager, put together with MBA research gave an excellent opportunity to reflect on daily management practices in relation to organisational strategy. The next two sections will introduce the context of the study and the unit of analysis leading to the research questions.

1.2 Store-based retailing

This study takes place in OPTIKA, a UK retailer that provides ocular services and products. The retail sector generated 8% of the United Kingdom's Gross Domestic Product (GDP) with sales reaching over £285 billion in 2009. Additionally, more than 2.9 million people, that is 11% of the UK workforce, were working in retail at the end of December 2009 (British Retail Consortium, 2010). Retail in the UK is a big part of the country's economy and everybody's life.

Varley and Rafiq (2003) define retailing as the selling of services or products to end consumers for their personal consumption. They categorise retailers into three main types: store-based, non-store formats and technology-based retailing. Despite growth in the latter two categories, the store-based type is still by far the most dominant form of retailing (British Retail Consortium, 2010). This category includes departmental stores, catalogue shops, discount stores, supermarkets and specialist stores (Varley and Rafiq, 2003).

Modern store-based retailers share a unique structure which Garvin and Levesque (2008) call the multi-unit enterprise, defined as a "geographically dispersed organization built from standard units such as branches, service centres, hotels, restaurants, and stores, which are aggregated into larger geographic groupings such as districts, regions, and divisions" (Garvin and Levesque, 2008, p.108). They suggest multi-unit enterprises face three main challenges. First, they struggle to maintain consistency among stores. OPTIKA, for instance, has recently launched another procedure that aims to standardise the layout and the appearance of over 300 stores. Second, as multi-unit enterprises set procedures

and policies in pursuit of standardisation, they must keep a degree of customisation which is a demand in our contemporary economy. Third, they concentrate on getting the best out of store managers and staff members; who operate in their units away from middle and senior managers.

OPTIKA for instance has invested heavily in ICT solutions that enable middle and senior managers to monitor Key Performance Indicators (KPI) such as sales; conversion rate and professional members' performances. Furthermore, this structure can cause a conflict of interest: store managers implement activities in order to maximise store profit margins whereas headquarters is interested in implementing procedures to improve the profit of the whole organisation (Chang and Harrington, 2000).

1.3 Store managers

Within the retail literature, store managers' activities are seen as limited to three distinctive areas (Varley and Rafiq, 2003; Levy and Weitz, 2006). First, managing and leading the store's employees. This includes staffing, socialising, training and development, motivation, evaluating, monitoring performance and compensating. Second, minimizing cost by increasing productivity, reducing overhead costs, reducing stock losses, forecasting and budgeting. Third, merchandising and managing the store environment. Moreover, Garvin and Levesque (2008) argue that store managers are also responsible for executing new initiatives generated either inside the store or at the organisational level.

The Human Resource Management (HRM) literature provides insights into the role of first line management in relation to strategic human resources issues such as

training and development, supervising teams and transferring knowledge. However, studies discussing store managers in relation to organisational strategy do not exist and that "... no discussion on operative personnel roles in strategic literature is disturbing" (Mantere, 2005, p.163), a point that is discussed at length in the next chapter.

1.4 Research aim and research questions

This research explores store manager strategizing in store-based retailing with the assumption that store managers do influence the strategy of their organisations in one way or another. More specifically, the study aims to answer the following research questions:

- How do store managers perceive strategy?
- To what extent do they see themselves as strategists?
- Can daily activities be related to organisational strategy?

The dissertation presents a pilot study for a PhD research that is planned to start next year. The dissertation answers the research questions in the following structure. This chapter has outlined the basis for choosing retailing as the context for this study and store managers as the unit of analysis. Chapter Two presents strategy and strategising in the current literature. Chapter Three of this dissertation discusses and justifies the research approach and the methods selected to answer the research questions. Chapter Four explains the actual data gathering activities and data analysis and Chapter Five presents findings and concludes the study.

1.5 Conclusion

The argument presented thus far is that modern store-based retailing is significant to both the national economy and general life in the United Kingdom. This form of retailing usually adopts the structure of a multi-unit enterprise and OPTIKA follows this norm. Moreover, store managers have great influence over the organisational performance and other organisational matters within this structure. However their strategic agency, is under researched, and this research will address this gap. The next chapter will discuss the theoretical and empirical work in relation to strategizing, locating this study within past and current strategic management debates.

2 Literature review

2.1 Introduction

This chapter briefly presents relevant theories and debates within the strategic management literature. It starts by arguing that the relatively new practice approach to strategic management research is a natural development of the field. The main premises of the practice approach then are presented followed by a critical review of six studies closely related to the subject and drawing on a key review of the field by Jarzabkowski and Spee, (2009).

2.2 The development of strategic management research

In recent years, strategic management research has paid more attention to individuals and how they actually 'do' strategy (e.g. (Mantere, 2005; Samra-Fredericks, 2003; Jarzabkowski, 2008; Balogun and Johnson, 2005; Beech and Johnson, 2005). Although this move fits with a wider 'practice turn' in social sciences (Whittington, 2006; Mantere, 2005), it can also be seen as a response by academics to a changing organisational competitive environment which has shifted the level and the frequency of strategic activities (Johnson et al., 2003). Either way, the emergence of the Strategy as Practice (SaP) theme and its relationship to other perspectives on strategy is best understood by reviewing chronological development of research within strategic management.

Furrer et al. (2008) suggest that the birth of strategic management can be traced back to a few major contributors during the Sixties. They cite Drucker and his

ideas around Management by Objectives (MBO) (Drucker, 1954), Chandler's proposition that structure follows strategy (Chandler, 1962) and Ansoff's work on horizontal and vertical integration (Ansoff, 1965). These contributions were based on single, in-depth case studies and were aimed at providing managers with tools to make decisions about business directions (Whittington, 1996). Strategy formation and implementation, at this stage, were seen as formal processes that requires a special set of skills and tools to be accomplished successfully (Mintzberg et al., 2001).

In the early Seventies, the foci of strategic management research moved towards understanding the relationship between business strategy and business performance (Segal-Horn, 2004). Strategy boutiques (Mintzberg et al., 2001) were open to business and ready-made recipes were given to eager companies telling them how to find the best match within their environments. For instance, Boston Consulting Group Ltd. developed their 'Growth Matrix' which categorised products within a given portfolio. Identifying products categories, it was argued, aids businesses to maximize the profit margin through channelling resources among the different categories (Johnson, 1992). The claim that there is a relationship between strategy and performance inspired Porter to examine the relationship between a business and its environment. Porter developed his influential structural framework, the Five Forces (Porter, 1980), to analyse how attractive an industry is. In addition, he helped to explain the difference in performance among rivals within the same industry developing his famous generic strategies matrix (Porter, 1980; 1985).

Towards the mid-Eighties, the 'process approach' to strategic management research was developed. Examples include Quinn's (1980) logical incrementalism, Mintzberg and Waters' (1985) emergent strategy and the study of strategic change by Johnson (1987). The process approach guided research back to internal organisational structures and resources and on to the resource-based view of strategy (RBV) that emerged in the nineties. Within this stem of research, Prahalad and Hamel (1990) argued that managers should exploit their core competencies to add value and achieve growth for their business. To give another example, Grant (1996) discussed knowledge management in the firm and stressed the intellectual assets of an organisation as a competitive advantage.

Methodologically speaking, this development is closely associated with shifts in the common unit of analysis and the research approach. At birth, strategic management research used a qualitative approach (single case study) and was interested in the work of individuals inside organisations (Management By Objectives, for example). This evolved towards interest in organisations at the industry level (e.g. Porter's five forces; BCG matrix) and used primarily quantitative methods to collect and analyse data (for example Rumelt, 1991; McGahan and Porter, 1997). Later on, research reverted back inside the organisation using qualitative methods (RBV and strategic change process). This movement backwards and forwards is described as a pendulum swing (Hoskisson et al., 1999). SaP follows this swing and invites us to research micro-activities at the level of the individual (Whittington, 1996; Johnson et al., 2003; Jarzabkowski, 2005; Whittington, 2006; Johnson et al., 2007).

2.3 Strategy as Practice (SaP)

It has been argued so far that SaP is a natural and continuous development of strategic management research (Hoskisson et al., 1999), supported by the practice turn in contemporary social theories (Whittington, 2006; Mantere, 2005) and responding to changes in the organisational competitive environment (Johnson et al., 2003). This branch of research calls for research into the 'nitty-gritty' daily micro-activities that affect organisational strategy (Whittington, 1996; Johnson et al., 2003; Jarzabkowski, 2005; Whittington, 2006; Johnson et al., 2007). Strategy, according to this standpoint, is not simply something an organisation has. Instead, strategy is something that individuals do together (Jarzabkowski, 2004). Hence, strategy is "a situated, socially accomplished activity" and "strategising comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity" (Jarzabkowski et al., 2007, pp.7-8). Thus, the SaP research agenda is concerned with "who does it [strategy], what they do, how they do it, what they use, and what implication this has for shaping strategy" (Jarzabkowski and Spee, 2009, p.69).

Doubts have been raised questioning the novelty of the SaP research agenda in comparison to the process stem of research. These suspicions argue that practice seems to be what is inside a process and that the two words are actually used "interchangeably" within the SaP literature (Chia and MacKay, 2007, p.219; Carter et al., 2008, p.90). Indeed, Whittington (2006) confirms that SaP expands an established tradition of research into managerial work (by Mintzberg, for example).

He argues, however, that earlier research focused solely on managerial roles and micro-activities without paying sufficient attention to the link between these micro-activities and their wider social context. Therefore, he draws upon Reckwitz' (2002) work in social theory suggesting an integrative framework to approach strategising. This framework is composed of practitioners, practices and praxis and is a pillar of the SaP literature. Each of the three elements is considered to be a gate into researching strategising (Jarzabkowski et al., 2007; Jarzabkowski, 2008; Jarzabkowski and Spee, 2009).

Applying Whittington's (2006) framework on the current literature reveals both similarities and disparities among definitions of the three elements. On the one hand, SaP studies adopt similar definitions of strategists and similar concepts of praxis. First, strategists are the strategy actors who do the work of strategy (Samra-Fredericks, 2003; Mantere, 2005; Whittington, 2006; Jarzabkowski and Spee, 2009). This is not exclusive to internal actors such as top managers (Beech and Johnson, 2005) and middle managers (Mantere, 2008), but also includes external actors like consultants (Laine and Vaara, 2007). Second, praxis is the flow of strategic activities by which strategy is crafted (Jarzabkowski, 2005; Whittington, 2006; Johnson et al., 2007). Praxis has been examined at individual, organisational and industrial levels (Jarzabkowski and Spee, 2009).

On the other hand, Carter et al. (2008) argue that the term 'practice' can mean anything within the SaP field from single loop learning in a macro-context, routine, single event, to conversation. A broad definition of strategic practice comes from Johnson et al. (2007), as they argue that practice can be either something people

'do' or something people 'engage with'. Unfortunately, this does not resolve the dilemma. For instance, strategic discourse can be something strategists do and engage with at the same time. Hence, there were calls from both within and outside the SaP research community to resort to wider social theoretical standpoints on practice and practices such as anthropology and dramaturgy (Carter et al., 2008; Jarzabkowski and Spee, 2009). If the SaP research movement is planning to advance our knowledge in strategic management, it is argued, researchers need to be more aware in terms of their ontological stance (Chia and MacKay, 2007).

Whittington's (2006) suggestion to use an integrative framework in order to link the micro and the macro in strategy, distinguishing SaP from the process perspective, is widely cited among SaP academics (for example Jarzabkowski and Spee, 2009; Jarzabkowski et al., 2007; Balogun et al., 2007; Mantere, 2005). However, this framework seems to be theoretical in nature and difficult to apply empirically until an agreement on what we mean by practice is established. The essential difference between SaP and the process perspective on strategy is as follows. While organisational performance issues related to "time, agency, structure, context, emergence and development" form the core of the process theory (Pettigrew, 1997, p.337), SaP research focuses on the performance of the individual practitioners while doing the work of strategy or strategising (Jarzabkowski and Whittington, 2008). This study, therefore, will avoid using the phrase practice and will instead term strategist activities as 'actions'.

Given that SaP has been introduced in the last section, we now take a look at relevant SaP literature in turn and discuss how researchers investigated strategising within the organisational setting.

2.4 Current literature related to this research

Jarzabkowski and Spee (2009) have recently conducted a comprehensive review of the SaP literature. The aim of this review is to link the micro and macro studies in the SaP literature by reviewing the field using Whittington's framework (Whittington, 2006). The authors also want to understand how the existing literature relates to the three concepts that constitute the framework (practice, praxis and practitioner). The authors find that the current research, when studying strategising practices, either conceptualize or empirically examine the relation between praxis and practitioners.

In terms of practitioners, Jarzabkowski and Spee (2009) argue that existing academic papers identify practitioners in relation to organisational boundaries. Therefore, practitioners can be categorised either as external or internal. According to the authors, empirical studies present internal practitioners either as individual actor (such as a single senior manager) or as collective actors within the organisation (e.g. middle managers in organisations). Hence, the review reveals three types of practitioners in the SaP literature: individual actors within organisation, aggregate actor within organisation, and extra-organisational aggregate actor.

Relying on Jarzabkowski et al's (2007) definition of praxis, Jarzabkowski and Spee (2009) differentiate three different levels of studying praxis within the SaP

literature. First level is the micro, which is located at the actors' experience of specific activities; such as decision-making or meetings. The second level is the meso. This level is concerned with praxis at the organisational level, change programmes or strategy process, for instance. Third level is the macro level, which discusses strategic praxis at institutional or industry level.

Using these two dimensions, practitioners and praxis, Jarzabkowski and Spee (2009) create nine-cell matrix. They label each cell a 'domain of research', and classify recent SaP papers into these nine domains (Figure 2-1 Typology of SaP research by type of practitioners and level of praxis). Further, the authors cite the number of empirical and theoretical papers in each domain.

Figure 2-1 Typology of SaP research by type of practitioners and

level of praxis

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

Source: Jarzabkowski and Spee 2009 p.74

Jarzabkowski and Spee (2009) clarify that their classification should not be understood as mutually exclusive; some studies can be classified into more than one domain. Consequently, they briefly discuss studies within each domain, the discussion leads to generic research questions that indicate the nature of research in the related domain.

Because this study looks into the micro-activities of individual strategist inside the organisational boundaries, and because this study is empirical rather than theoretical, the researcher chose to review the six empirical papers in domain A, which was feasible within the time given to this piece of research. This review was desirable in order to examine the methods and methodology already used to research this area. This examination is summarised in Table 2-1 Comparison outlines among empirical studies in domain A. This section will proceed as follows. First, common patterns among the studies are presented. Then, issues related to each individual study are discussed. The section will conclude with an illustration of a gap revealed by this critical review to be addressed by this study.

It is clear from Table 2-1 Comparison outlines among empirical studies in domain A) that the six studies resorted to the social sciences seeking a theoretical stance to explicate the complexity of strategising. Justification for this trend is that SaP sees strategy as a social accomplishment through interactions among people. This turn to social aspects comes as an attempt to step away from dominant macro-economic theories (Barney, 2002) and to humanise strategic management research (Pettigrew et al., 2006). However, involving the social aspect brings about two issues. First, instead of managerial roles or functions, these studies

embrace the notion of managerial agency (Mantere, 2008). Second, qualitative data collection methods are favoured, four out of the six studies here employ in-depth case study design. Mantere's works are the exception (Mantere, 2005; 2008) as they use a larger number of interviews to compare and contrast. Case study research design is concerned with the complexity of the case (Stake, 1995) but it cannot produce generalisable outcomes (Bryman and Bell, 2003).

Furthermore, the six studies focus on top managers with the exception of Mantere (2008) who studies middle managers in the absence of top managers. Mantere's claim of including operative personnel in his first study (Mantere, 2005) is problematic as the author uses the same sample in both studies to obtain his data: three hundred and one semi-structured interviews carried out in twelve Northern European organisations that operate in service and governmental sectors. In the first study, Mantere states: "the level of operative personnel forms the largest group of interviewees, corresponding to the lack of research utilising them as informants when discussing strategy. Middle managers are also well represented for similar reasons." (Mantere, 2005, p.161). In his second paper and within the same sample the author finds that "the total number of middle managers in this data set is 262" (Mantere, 2008, p.298). Therefore, the sample seems to be largely composed of middle managers. From the above discussion, it can be concluded that the current research in domain A examines both top and middle managers as the unit of analysis.

Table 2-1 Comparison outlines among empirical studies in domain A

Paper	Theoretical Stance	Methodology	Design	Methods
Mantere (2005)	structuration theory	inductive, grounded theory abductive, grounded theory	comparative case studies	semi-structured interviews
Mantere (2008)				
Samra-Fredericks (2003)	ethnomethodology theory of communicative actions	ethnomethodologically-informed ethnography conversation analysis	in-depth case study	observation
Samra-Fredericks (2005)				
Bourque and Johnson (2008)	anthropology: ritual theory	conversation analysis	in-depth case study	participant observation
Beech and Johnson (2005)	identity theory	narrative analysis	longitudinal case study	interviews, video, coaching sessions and observation

Paper	Strategic Practice	Unit of Analysis	Paper's Audience	Limitations
Mantere (2005)	championing activities role expectations	top, middle managers and 'operative personnel' middle managers	academics	limited to service industry, based on the managers' own perception
Mantere (2008)				
Samra-Fredericks (2003)	strategic discourse	top managers		require high-level access, consumes long time, presenting short extracts out of large corpus
Samra-Fredericks (2005)				
Bourque and Johnson (2008)	strategy workshops		'managers'	attempts to generalise from single case study
Beech and Johnson (2005)	Discourse		Academics	weak theoretical background

Although most of these studies include a paragraph on implications for practitioners in their conclusions, they all address academic audiences. For instance, Bourque and Johnson (2008) cite what they describe as 'considerations for managers' at the end of their paper. However, the paper appears in the Oxford Handbook series, which is introduced by the publisher to be targeting scholars and graduate students (Oxford University Press, 2010).

After presenting common themes among the six empirical studies in domain A (Figure 2-1), each research will be examined on its own merit. Starting with Mantere's studies (Mantere, 2005; 2008), the author refers to using a large number of interviews (in excess of two hundred and fifty) and claims to employ random sampling to select participants. Despite his effort to improve generalisability of his grounded theory approach, this random sampling took place within the selected sample of companies that is unrepresentative of all businesses. In fact, the author invites research into an industrial context to examine his findings (Mantere, 2008).

Samra-Fredericks (2003; 2005) decides to take the conversation analysis route and uses both ethnography and ethnomethodology traditions to present rich accounts of daily interactions among a top management team. For her, strategic practices lay in the complicated interwoven social relationships and explicating this complexity cannot be accomplished using traditional methodologies. Hence, she suggests an innovative and multidisciplinary methodology to research and present strategising as 'lived' everyday experience.

In her first paper, Samra-Fredericks (2003) looks into the use of linguistic skills by a strategist ('strategist A'); who used these to steer the strategic direction of his organisation. By doing this, she focuses on the strategic discourse, which is concerned with conceptions and lines of logic within conversation. She uses the same data set in the second paper and focuses more on the specifics within the discourse of strategy. Her aim is to reveal the power effects deployed by strategist A in order to influence organisational strategy (Samra-Fredericks, 2005). Both studies use the term 'strategists' as reference to elite management only (Samra-Fredericks, 2003; 2005). This partitions all other organisational, or non-organisational, members from being involved in strategising in her studies. Nevertheless, the author presents an authentic and novel methodological approach to advance our research methodologies at the micro-level.

Beech and Johnson (2005) examine strategic change as micro-processes using narrative analysis. This suggests that they consider the change process to consist of several 'practices'. In addition, the paper argues that identity dynamics are relevant in understanding strategic change as 'incremental moves'. Moreover, the authors declare the use of several methods of data collection in order to get a better 'narrative' of the strategic change they theorise. These methods include interviews, video recording, coaching sessions and field notes. Furthermore, the data used is a subset of data collected during a longitudinal study of a business organisation. The purpose of the original engagement is not given, which raises questions over the fit between the original data collection methods and the research aims and objectives. Besides, Beech and Johnson (2005) report the identity shifts chronologically drawing a neat storyline even though they conclude

that identity shifts cannot be neither coherent nor smooth due to certain types of 'disjuncture'. Their findings, based on their own interpretations, are well supported with extracts from the data set. However, the paper does not introduce identity theory in organisations and therefore presented with a very brief theoretical background.

Finally, Bourque and Johnson (2008) introduce the theory of rituals and ritualisation and discuss strategy workshop 'Away Days' in relation to that theory. They describe how the physical detachment from everyday activities is effective to think 'outside the box' and create shared commitment. Nevertheless, such commitment is presented in the paper as short-lived and unsustainable. Hence, they argue that participants in these events are not successful in completing the integration stage of the rituals. Ritualisation theory has no explanation this issue and the authors do not attempt to provide any justification for that failure. Instead, they conclude their article with bold generalisations presented as recommendations for managers. A call for further research to rectify this specific failure would have been appreciated.

2.5 Conclusion

This literature review started by presenting the new SaP approach to strategic management research chronologically and positioning it among other research movements in the strategy field. Subsequently, six studies that relate closely to this research were critically reviewed. Even though SaP as a research movement invites researchers to get down from their ivory towers and immerse themselves in the daily work of strategy (Johnson et al., 2003; Whittington, 2006; Jarzabkowski

et al., 2007), none of these studies involved first-line operational managers. The focus remains on top and middle managers as the strategists in organisations. The proposed study will address this gap by putting first line managers in the spotlight and the next Chapter will discuss the methodology chosen to carry out this pilot study.

3 Data collection methods

3.1 Introduction

The relationship between raw data and research outcomes has a philosophical nature (Easterby-Smith et al., 2008). Therefore, our philosophical stance as to the nature of the world, and how we learn about it, guides our choice of research design and methods of data collection (Crotty, 1998; Johnson and Duberley, 2000; Easterby-Smith et al., 2008). This chapter therefore starts by discussing the effect of philosophical stance of the researcher. It then considers the selected research design and data collection methods for this study. Finally, after detailing how access was gained, it presents the way in which the researcher responded to relevant ethical considerations.

3.2 The philosophical stance

Most philosophical debates emerge from their assumption about the existence in the world, or their ontological standpoint. On the one hand, ontology refers to the nature of the existence in the world (Easterby-Smith et al., 2008). Epistemology, on the other hand, refers to the assumptions on how we can understand and learn about that existence (Easterby-Smith et al., 2008). Epistemological position follows the ontological position, and the acceptance of a certain epistemological position leads to the adoption of a particular research design and data collection methods that attributed to that position (Crotty, 1998; Easterby-Smith et al., 2008).

It is common to view positivism and social constructionism as two opposite philosophical extremes within social sciences (Easterby-Smith et al., 2008; Kalof et al., 2008). On the one hand, positivism refers to the view that the social world exists objectively independent of the researcher's own beliefs and values, and that general social laws can be revealed through following pre-determined clear procedures employing objective methods of data collection. These methods are the researcher's tool to test theories or hypotheses (Crotty, 1998; Hammersley and Atkinson, 2007; Easterby-Smith et al., 2008). On the other hand, social constructionists emphasise that reality is socially constructed through the interpretations of individuals, their experiences, cultural orientations, power relations and other social forces. Furthermore, social research should aim to understand people's interpretations of the world, individually and collectively, and should appreciate the differences among these perspectives (Kalof et al., 2008; Easterby-Smith et al., 2008). Positivism and constructionism are considered to be at two opposite extremes. However, various stances between them do exist such as pragmatism and critical realism (Johnson and Duberley, 2000).

Some writers stress the need for researchers to be aware of their philosophical stance before choosing a research design (Gray, 2004; Easterby-Smith et al., 2008). Others invite researchers just to adopt a position that enables them to answer the research questions (Crotty, 1998; Kalof et al., 2008). Furthermore, Crotty (1998) argues that each research has its own unique methodology. In this study, the researcher takes a position towards constructionism, without being at the very extreme of the scale. This position serves to achieve the research objectives and to respond to its questions.

3.3 The research strategy

Selection of a particular research strategy should be done carefully in order to answer the research question. As a first step, the research here takes qualitative approach over a quantitative approach. The latter allows testing of hypotheses to uncover the laws controlling certain phenomena and usually follows a deductive logic of enquiry (Johnson and Onwuegbuzie, 2004; Kalof et al., 2008). Qualitative approaches, as used here, seek to understand personal experiences, describe complex phenomena and aim to portray why and how things occur typically following an inductive logic of enquiry (Johnson and Onwuegbuzie, 2004; Kalof et al., 2008).

The second step was selecting a suitable research design and data collection methods within the qualitative approach addressing three conditions of the research environment. First, he has no control over the research environment or the participant behaviour. Second, the research questions ask how and why a phenomenon occurs. Third, the research is interested in contemporary rather than historical events. Case study design is considered as being suitable and desirable under these conditions (Yin, 2003) and was the prevalent method among five of the six studies within domain A (Figure 2-1). Table 2-1 Comparison outlines among empirical studies in domain A, details this outcome.

This design allows us to dive deep into the complexity of social phenomena and enables an intensive and detailed examination of the case (Bryman and Bell, 2003). However, case study approach is limited in terms of generalisations (Stake, 1995; Yin, 2003; Bryman and Bell, 2003). On the one hand, Yin's (2003) positivist

position argues that by developing a theory before data collection and consistently pursuing a logical link between research questions and the collected data, case study can produce generalisable conclusions. On the other hand, Stake (1995) claims that case study design should aim for particularisation rather than generalisation. Stake also argues that case studies can still make modest generalisations through modifying present generalisations. The researcher takes Yin's advice seriously, by pursuing a link between the research aim and the raw data, but he does not follow it literally as this restrains the potential flexibility of the case study design (Barbour, 2008).

The case used in this pilot study is descriptive and exploratory (Yin, 2003) as it aims to describe a certain phenomenon and to explore related factors. In addition, it is an instrumental study (Stake, 1995) seeking to expand our understanding beyond the particular case of research. The researcher opted to focus on a single case containing a single unit of analysis, which Yin (2003) labels as holistic case study. This type of case study is said to face serious threats to its validity and reliability. However, it can be justified by two reasons. Firstly, this is only a pilot study for a subsequent PhD research (Gray, 2004). Secondly, it is heavily time constrained by the nature of the M.Res examination process.

3.3.1 Introducing the case study and the unit of analysis:

The case in this study is OPTIKA, a UK optical retailer. OPTIKA employs two types of staff members: ocular-professionals and non-professionals. Professionals need to study a two or three-year curriculum before embarking on a training program to obtain their professional status. Professionals renew their annual

membership with a national governing body and adhere to a specialised set of guidance and laws laid out by that body. Store managers do not have to be professionals and sometimes they are recruited from different industries. OPTIKA has over three hundred outlets in the UK and Ireland (OPTIKA's website), some of which are franchised operations. This study relates only to those stores which are owned and operated by OPTIKA directly as franchise outlets are Small and Medium Enterprises and operate with a different structure, which is outside the scope of this study.

The unit of analysis is a store manager (SM1). SM1 is twenty-nine year old male, born and raised in London with a British-Indian ethnicity, who had thirteen years of experience in the industry. He had joined OPTIKA five years ago after completing a professional qualification. He practiced as a professional member of staff for a year before being promoted to an assistant store manager at a North London branch (referred to as location one in Appendix D: Interview transcript, to respect confidentiality issues) in two thousand and six. He then successfully applied to a store manager position at a central London branch (location two in the transcript) in two thousand and seven. He recently moved to the current branch in October two thousand and nine, where this study took place. His store is a typical small retail outlet with one store manager, two assistant managers, one team leader and ten staff members. Six of the fourteen employees are professionals. Recruiting SM1 will be explained later while discussing access.

3.4 Data collection techniques

Combining different data collection techniques improves internal validity of the findings within the case study design (Yin, 2003; Stake, 2005). This study employs both interview and observation due to nature of the data generated. They produce rich descriptions of social accounts, to answer the research question. The study could have also used visual methods such as video recording and photography but were rejected as the analysis consumes long time and requires additional skills.

3.4.1 Interviewing

An interview is “a purposeful conversation wherein the interviewer has a set research agenda” (Ruane, 2005, p.149). Semi-structured interviewing was selected as it serves the explanatory nature of the study and can capture the unique experience of the participant (Ruane, 2005; Gray, 2004; Easterby-Smith et al., 2008). This technique also allows for unanticipated responses to emerge by enabling the participant to respond using his/her own words (Kalof et al., 2008). The semi-structured interview here is defined as an interview having some topics to discuss, rather than a pre-organised list of questions to answer.

Furthermore, for interviews to be a good source of data, the interviewer must have a certain set of skills (Ruane, 2005; Gray, 2004). This includes knowledge of the research objectives, good social skills, being an active listener, the ability to build a rapport and to obtain participant trust in a short time. The researcher has practiced some of these skills while conducting previous Master's Level research but also sought to improve these skills by attending appropriate training sessions.

Conducting the interview on the company's premises may feel formal and less confidential (Gray, 2004). Therefore, the discussion with SM1 was planned originally to take place outside the store. SM1 also allowed the recording of the interview. The recording provides two advantages (Gray, 2004); firstly, the interviewer can concentrate on the overall flow of the interview and pay more attention to the non-verbal communications rather than being occupied with taking notes. Secondly, it provides an actual recording, which is an unbiased documentation of the conversation.

Interview bias occurs initially when the researcher imposes his/her frame of reference throughout the interview and later during the analysis stage (Gray, 2004). Therefore, the questions will be posed in an open-ended format where SM1 can address the topics of interest freely.

3.4.2 Observations

Hammersley and Atkinson (2007) argue that the interpretations of oral accounts must be seen within their social context. Although the researcher's previous work experience with OPTIKA equips him with the advantage of prior understanding of the environment, collecting data through observations on top of the interview helps to gain a better appreciation of the context within which SM1 operates. Moreover, direct observation is a way of linking what people say to what they actually do because people are unaware of most of their behaviours (Kalof et al., 2008). The researcher planned to observe two weekly meetings. These meetings are always scheduled for Saturday mornings, thirty minutes before the trading hours. They are

the main opportunity for the store manager to communicate organisational plans or current topics with the team.

The observations will take a direct form where the researcher only observes and takes note. Avoiding participation helps to minimise the impact of the researcher's presence on the settings (Kalof et al., 2008), an effect known as 'reactivity' (Hammersley and Atkinson, 2007).

Note-taking is an essential part of the method and should provide a rich and accurate description that aids the researcher to recall events later (Kalof et al., 2008). Lofland and Lofland (1995, as cited in Khalof et al. 2008) list five elements that should be included when taking notes: basic information about the observation, afterthoughts and any forgotten issues during the observation, the researchers' own impressions and emotional reactions, ideas for the analysis stage and notes to guide future observations. Finally, conducting observations aims at researching strategising not only as it is reported, but as it is happening, a point which was discussed at length in Samra-Fredericks' (2003; 2005) papers.

3.5 Access negotiation

Buchanan et al. (1988, p.54) cite "in the conflict between the desirable and the possible, the possible always wins" describing the opportunistic approach to management research.

Having worked for OPTIKA for more than three years and having conducted a previous research within the company, the researcher had an excellent basis on which to ask for access. Access negotiation had started more than a year ago

when the researcher was still a junior manager at OPTIKA and began by discussing the potential research with London's regional manager. This was followed by sending him an email outlining the broad interest of the research, anticipated data collection methods and an offer to present the final outcomes to OPTIKA. Verbal approval came three months later from the operational director via the regional manager. This approval, however, came with two conditions. First, findings must be reported back to OPTIKA. Second, anonymity must be guaranteed and no industry-specific publications to be produced as a result of the research.

Having the support from the middle and higher management team does not guarantee effective data collection. Indeed, many researchers in social sciences were faced with strong resistance by the participants which can halt the research progress (few cases are mentioned in Taylor, 2002). The researcher had maintained networks with other store managers and this proved fruitful. The opportunity for this dissertation arose directly from a casual conversation with one of the store managers who gladly accepted the invitation to participate in the research. This relationship between the researcher and the participants should be managed carefully. On the one hand, gaining good access to a business organisation is both difficult and essential for management research (Buchanan et al., 1988). On the other hand, a very close relationship raises questions about the confirmability of the research (Lincoln and Guba, 1985 as cited in Bryman and Bell, 2003).

Nevertheless, being seen as an 'insider' has the advantages of prior understanding of the case (Saunders et al., 2006) which is desirable for high

quality analysis of raw data (Yin, 2003). Moreover, this access provides a unique opportunity to get extremely close to everyday activities, which is cited as a requirement to study strategising (Balogun et al., 2003).

Gaining access to organisations empowers researchers to conduct their research but carries ethical responsibilities. This point will be the centre of discussion of the next section.

3.6 Ethical considerations

There is a growing emphasis on implementing ethical codes of practice among research institutions. These ethical codes are for the purpose of protecting the participants and ensuring the accuracy of the collected data (Easterby-Smith et al., 2008). Ethical codes in social sciences are becoming more coherent and they generally share four main common themes (Christians, 2005; Ruane, 2005). These themes are: causing no harm to participants, obtaining informed consent, protecting privacy and confidentiality and avoiding conflict of interest. This research follows the Economic and Social Research Council ethical framework (ESRC – FRE) for three reasons. First, it is a widely used and well-respected by UK scholars. Second, the researcher found comprehensive and detailed description within the guidance. And third, the framework is revised and updated periodically. The researcher obtained the Open University ethical approval prior to commencing data collection.

This study follows Ruane's (2005) advice and includes the following points in the consent statement: the purpose of the study, the researcher's background, the benefits of participating in the research, the promise to share the findings,

indication of the level of confidentiality of the data and, most importantly, advising that participation is voluntary and consent can be withdrawn (Appendix A: Consent form; presents the form used for this dissertation). Moreover, SM1 will have the opportunity to discuss any issues related to the research prior to the data collection activities. SM1 will also be provided with the appropriate contact information of the researcher and the lead supervisor should any future concerns arise. In addition, all raw data will be upon collection to protect the privacy of the participants. Furthermore, research will not include any fabrications, fraudulent materials or omissions (Christians, 2005) as this harms the integrity of not only the researcher but also the institution which he belongs to.

Finally, Ruane (2005, p.28) states that “the choices researchers make might well be influenced more by the story they want to tell”. The decision on what story to tell is closely related to the interpretations of the data. Stake (1995) argues that findings resulting from a case study design are based on interpretations that are influenced by the individual’s own experiences and background. Hence, the ultimate ethical duty rests on the shoulder of the researcher to provide the best interpretations according to his present knowledge. Reflexivity will be discussed at length in the data analysis chapter.

3.7 Conclusion

This chapter has discussed how adopting a certain philosophical stance influences the selection of the research approach, the research design and data collection methods. Moreover, the researcher’s choice of following a case study design, and his choice of using interview and observation as data collection methods, were

described and justified in relation to the research questions, bearing in mind other alternatives. Furthermore, the selected case and unit of analysis have been introduced, detailing how access was granted. Finally, ethical considerations in the conduct of this study are addressed.

The next chapter discusses how the data was actually collected, and the difference between what actually happened and what had been planned initially. It also presents the steps that the researcher followed in order to analyse the data.

4 Collecting and analysing the data

4.1 Introduction

The last chapter discussed the chosen data collection methods and the intended plan to complete the collection. This chapter will be in three main parts. The first provides details of preparations and the data gathering activities. The second part considers reflexivity issues. The third part describes the selected data analysis method giving the justification for and samples of the coding.

4.2 Collecting the data

The data collection was carried out during July 2010. The initial plan was to conduct the interview first and then the two observations. However, the interview was postponed three times. Therefore, it had to be completed after the observations. Nevertheless, this allowed the researcher to discuss the meetings during the interview, linking them directly to the research questions as per Yin's advice (Yin, 2003).

4.2.1 The observations

The observations took place on two consecutive Saturday mornings. The meetings were chaired by SM1 and were held on the shop floor with the team members. Staff sat around the sales desks forming a large oval shape. From the researcher's own experience with OPTIKA, these meetings usually take place in the staff room where the attendees face the manager who is in charge. The setting in this particular case suggests a friendly atmosphere in the store and the

openness of the store manager, as he wants to engage his team in a discussion rather than communicating with them in a lecture-style meeting. Indeed, both meetings' notes included many descriptions of how SM1 was inviting participation from his team members either via asking questions such as "can anyone tell me?" , "what have we learnt from this?" or by starting an open-ended sentence and leaving it to be finished by a staff member (Appendices B and C).

As a non-participant observer, the researcher positioned himself outside the oval-shaped formation at another desk leaving a gap of two meter. Nonetheless, reactivity can be minimised but cannot be completely avoided. Notes from the first meeting included the following: "I was wearing a company badge, casual clothes. The team was friendly and asking about my newly born son. I know everyone personally. Explained why I'm here and what I will be doing." (Appendix B: Notes from the first meeting).

In the second meeting, four members of staff arrived late, and they spontaneously sat near me away from the main meeting spot. The researcher wrote in the notes: "my own position contributed later to spread it [the position of the meeting] over to 6 desks because all the late comers sat in the area around me. [...] However, all the late comers did not participate in the meeting, two of them were from the lab team, and the third was a locum professional member" (Appendix C: Notes from the second meeting).

The researcher had queried the possibility of recording the meetings with the store manager first. SM1 had agreed, provided that the rest of the team were at ease with the recording. Hence, the researcher asked the team attending just before the

beginning of the meeting, they all agreed to allow the recording. The audio recorder used was the size of a car key. Using a small recorder thought to reduce reactivity as participants are less likely to be aware of it. However, it was not a winning compromise as the quality of the recording was average. Recording equipment should have been tested in the actual data collection environment beforehand.

Initial notes were taken during the meetings. Afterwards, the meetings' notes were finalised by listening to the recording and writing a narrative of what had happened using a text editor. This finalisation was done within twenty-four hours of the original meeting. Lofland and Lofland's (1995, as cited in Khalof et al. 2008) advice, discussed in the previous chapter, drove both versions. First and second meetings notes are provided in Appendices B and C respectively.

It was the first time for the researcher to use observations as data collection method. The amount of data to be captured was overwhelming and it was very easy to lose track of the actual conversation. Not to mention the researcher's own thoughts and feeling during the observations, the overwhelming came from observing non-verbal communications such as body languages, physical positions, face expressions and voice tones. While these aspects are essential and important in observational methods, they should be managed carefully not to distract the purpose of data collection. Fortunately, the participants allowed audio recording which was indispensable for the analysis stage. The researcher was much better prepared in the second meeting and he was able to focus on the actual topic of discussion in addition to recording some of the non-verbal communication that he thought to be important in the context.

4.2.2 The interview

In preparation for the interview, the consent form (Appendix A: Consent form) was emailed a week ahead of starting data collection. SM1 confirmed receipt of the form and said that he had read it and that he had no questions. However, SM1 postponed the interview three times due to his tight schedule. He then offered to meet before the trading hours on Sunday morning, which limited the interview to less than forty minutes. SM1 also suggested that the interview should take place in the store as none of the staff will be present that early. The researcher had originally planned to conduct the interview outside the store in order for it to be perceived as non-formal and guarantee confidentiality for SM1. However, since the store was unoccupied by other employees at the time of the interview, the researcher believed that SM1 would still feel unthreatened during the interview.

The research objectives were discussed at the beginning of the interview and the researcher explained to SM1 that the interview would take the form of a conversation between the two of them. The researcher had drafted the following points for discussion without revealing them to SM1:

- The meaning of the word strategy, as perceived by SM1
- OPTIKA's strategy and how it is communicated to SM1
- How SM1 is involved in the strategy making / implementation, if he considers himself to be a participant
- Whether OPTIKA's strategy is important for SM1's daily activities

- Whether SM1's daily activities affect OPTIKA's strategy, and how it is affected by that strategy

These points were derived mainly from reflecting on the research questions.

Due to the prior knowledge between the researcher and the participant, the interview's atmosphere was relaxed without any apparent tension. The interview started by asking SM1 about his experience as a manager within the company, moving to discussing the points prepared earlier. Listening to the interview later revealed that during the first half of the interview, both parties used short sentences. Equally, questions and answers sound as if they were reluctant. However, after approximately twenty minutes the researcher thanked the participant and asked him if he wanted to add anything. SM1 wanted to say more, and he spoke for another eighteen minutes. This part of the interview is made up of longer sentences and sounds more confident. It appears that the rapport and the trust were being built gradually. A lesson was to be learnt that even with prior knowledge between the researcher and the participants, trust should never be assumed.

The use of language in semi-structured interviews requires high skills and long practice to be perfected. As a non-native speaker of English, the researcher needed longer time to construct the questions and sounded like if he was hesitating. Also, the researcher over-used some discourse gestures such as 'okay', 'mmm' and 'yeah'. In the future, additional preparation should take place before the interviews.

The interview was transcribed within one week. Early drafts included notes about SM1's body language and voice tone. However, only a few of these notes, which were considered essential to understand the transcript, are left in the final version, which is provided in Appendix D.

4.3 Reflexivity

Before embarking on presenting the process of data analysis, this section discusses reflexivity and how the researcher's identities constantly existed as an invisible co-author during data collection, data analysis and during the interpretation of data.

Lynch (Lynch, 2000) illustrates the diversity of the term in the literature. For the purpose of our discussion, Pels provides a suitable definition of reflexivity: "in its most elementary form, reflexivity pre-supposes that, while saying something about the 'real world', one is simultaneously disclosing something about one-self" (Pels, 2000, p.2). What Pels calls 'one-self'; Easterby-Smith et al. (2008) refer to as 'elements of identities'.

Prior to data collection, few measures were considered to help the reader account for the researcher's reflexivity. First, an 'emic' approach to data analysis is adopted (Silverman, 1993 as cited in Wetherell et al., 2001, p.16) where the data categorisation emerges from the raw data. Second, methods triangulation (Patton, 1987; as cited in Yin, 2003) of data is exercised via combining two methods for data collection. Third, the researcher provides sufficient raw data prior to presenting the findings (Stake, 1995). Finally, the researcher will guide the reader through and provide examples of the coding.

During data analysis and interpretation of the findings, the researcher attempted to account for his influence over these stages. First of all, the researcher's thoughts prior to carrying out this study have influenced the way he conducted the research activities. For instance, he believes that strategy is practiced and embedded in everyday activities and therefore daily activities can have an effect on the overall company's strategy. These assumptions were evident in the interview as SM1 apologised to the researcher: "well I know... I mean I'm sorry it doesn't answer... I know you're trying to get... ahhh... how do I... do strategy myself... but it's like I said... it's dictated by the company... so..." (Appendix D: Interview transcript). Another example is interpreting operational KPIs as strategic. In the researcher's opinion, these KPIs are set by the company's head quarters as targets and linked directly to strategic statements. Hence, increasing customer conversion from 8% to 9%, which is a daily operational KPI, is related to, and directly driven from, the company's strategy of being the best optician in the market (OPTIKA internal document). Alternatively, another researcher or a reader who believes in the classical view of strategy would argue that business KPI's are purely operational and cannot carry a strategic nature.

Second, the researcher's experience in OPTIKA, both as an employee and as he carried out a previous study within the company, has granted him prior understanding of the context which an outsider would have needed a longer time to acquire. For instance, when SM1 talked about customer service, the researcher knew that this aspect is the most important and constant strategic direction in OPTIKA for more than ten years. Moreover, knowing other employees personally

thought to facilitate not only gaining access but also gaining participants' trust quickly.

This embedded knowledge cannot be, and should not be, separated from the researcher's identity as an academic investigator. Hence, the researcher's identities as a researcher, as a previous full time employee at OPTIKA and as an individual had an influence on the research activities and the writing of this dissertation.

4.4 Analysing the data

Data analysis methods in similar studies were touched upon earlier in Chapter Two. A decision was made to exclude detailed conversation analysis of the type that Samra-Fredericks (2003; 2005) used in her research due to the lack of the appropriate level of skills required and the limited time available for analysis. Instead, content analysis of the notes and the transcript was performed. The analysis followed a repertory grid method (Easterby-Smith et al., 2008). An overall description of the process will be given here, details will then be provided in the rest of this chapter.

The researcher started by listening to the first meeting's recording while revising the associated notes (Appendix B: Notes from the first meeting). Immediately after that, the notes were coded. The same process was then repeated for the second meeting data and the interview transcript. Subsequently, these codes (eighteen from the first meeting, twelve from the second and forty-six from the interview) were recorded on one large spreadsheet to facilitate finding similarities. Next, comparable codes were grouped into themes. Finally, linkages were sought to the

existing literature leading to drafting of the outcomes of the study. While this process supports the intended emic approach to the data analysis (Silverman, 1993 as cited in Wetherell et al., 2001, p.16), it operates in a reflexive manner relying heavily on personal constructs (Stewart et al., 1981 as cited in Easterby-Smith et al., 2008).

4.4.1 The coding

The meeting notes were written as a narrative where the researcher tells a story of what had happened. The narrative included the researcher's own emotions during the meetings in addition to some description of the participants' body language. Job title initials (Table 4-1) replaced the real names. This was done not only to protect the identity of the participants, but also because the researcher sensed variances attributed to the participant's job description. These variances were thought to be both in the amount and in the subject of the participation. For instance, associates inputs during the meeting were querying the operational details, one of the professional members was constantly challenging what was communicated from the head office, and the management team contribution was more orientated towards giving directions, explaining procedures and illustrating examples. Moreover, the researcher's own previous prior managerial experience with OPTIKA encouraged this feeling because store managers habitually seek different feedback from different employees according to their role within the store. Typically, store managers discuss detailed sale procedures and techniques with associates, they ask clinical decisions and follow up with customers from the

professionals, and they invite their assistances and team leaders to look after organising special events and monitoring certain aspects of the store performance.

While the small data set collected for this pilot study cannot permit any conclusion of this nature, this practice will be more beneficial in doctoral research where computerised analysis will be used. Name replacements are suffixed with a numeric to distinguish two participants with the same title. They are also used in the interview transcripts.

Table 4-1 Replacing names with job title initials

Job Title	Text Replacement	Job Title	Text Replacement
Store Manager	SM	Professional Participant	PP
Assistant Store Manager	ASM	Associate Participant	AP
Team Leader	TL		

Both the meetings notes and the interview transcript were coded manually on hard copies. The coding was based on the researcher's own reflections while listening and reading the text. For instance, when building a relationship with the head office was described, the associated code was about communications. Three examples from each text are given in Table 4-2. These examples demonstrate the challenge cited by Samra-Fredericks (2003; 2005) concerning the limitation of

using small extracts for representing large body of corpus. This challenge was dealt with through looking for the 'bigger picture' and following the overall themes within the narrative, whilst keeping in mind the research aim of exploring strategising.

Table 4-2 Coding samples

Original Text	Code
<p>SM1 announced a new procedure that “came from the head office” in relation to a new loyalty card scheme. He used the term Head Office even though OPTIKA insists on using another term instead, which is ‘the support office’. The procedure should be read and staff should initial their names on the documents, he read and explained some of the main points included. Employees asked for details, and SM1 replied and justified, giving practical solutions to some anticipated problem related to the new procedure. He explained that for those who do not comply there will be disciplinary actions because it costs the company money. The team seemed surprised and SM1 communicated the cost of the new loyalty scheme comparing it with more known points-based loyalty scheme.</p>	<p>SM1 communicated a new procedure not only by presenting the document as dos and don'ts but also adding justifications to that document</p>

<p>ASM1 joined asking why the right questions are not being asked confirming that it's a persisting problem. PP1 complements TL1 skills in asking the right questions. SM1 elaborated "it's not so much what you don't write, it's what you ask for example." SM1 then explained how asking the right questions can improve store's KPI, team is listening but not joining in. SM1 continued. PP1 explained another benefit from asking the right questions related to her task in the store, "if we are running behind".</p>	<p>SM1 links everyday activities to overall KPI's</p>
<p>SM1: [talking about OPTIKA's strategy] "it's direction isn't it? It's like... what, where the company wants to be and what... and what they want you need to do... "</p>	<p>Strategy is perceived as a 'direction'</p>

The final stage of analysis, and the first stage of interpretation, involved grouping similar codes together in themes. Three main themes will be presented in the next chapter.

4.5 Conclusion

Chapter Three discussed the intended methods of data collection of this research; this chapter was presented in two parts. Firstly, aspects of data collection are illustrated with emphasis over how unforeseen difficulties have changed the original plane of research and how that could have affected the study. Secondly,

the chosen data analysis process was first presented and then examined in more detail. The chapter also stressed reflexivity issues between the two parts.

In the next chapter, the researcher's own interpretations of the collected data are constructed in the light of the literature review introduced in the second chapter.

5 Data interpretations and findings

5.1 Introduction

The aim of this chapter is to present the findings of this pilot study and to conclude the dissertation. First, the final phase of data interpretation is connected to the data analysis whilst appreciating the limitations of the findings and this study. Afterward, the three main themes that come out of the data analysis are linked to the existing literature and the research questions. Finally, implications of the findings will be discussed before concluding the dissertation with personal reflections on conducting academic research.

5.2 Interpreting the data

Codes were clustered according to similarities in content. Three main themes were dominant. The first cluster conveys the existence of multiple strategies in OPTIKA, in addition to how SM1 made sense of them. The second theme illustrates a disagreement between the way SM1 perceived his strategic agency and the way he described his actions and activities. The third group indicates the importance of both vertical and horizontal communication. Later on, they were re-labelled as presented later in this chapter.

While reflexivity issues were discussed in the last chapter, the researcher's reflexivity continues to influence the interpretation of the data set. Hence, alternative interpretations are possible and can be equally justified. For example, adopting a classical view on strategy can result in not only generating different

themes but also creating different codes from the same data set. Hence, the research findings should not be seen as the reality or explanations of what had happened. Instead, they should be considered as a personal understanding of how the researcher viewed the phenomenon, he is curious about, while relying largely on the participants' inputs. The researcher, however, sought to be transparent in every step of that reasoning, attempting to share his own beliefs with the reader alongside the interpretation process.

5.3 Limitations

Selecting a holistic single case study design (Yin, 2003) dictated that the outcomes would be aimed at particularisation rather than generalisation (Stake, 1995). Hence, the findings are limited to the store manager who participated in the researcher.

Identical to Mantere's cited studies (Mantere, 2005; 2008), this research is mostly dependent on the participants' account. While this was methodologically justified in order to respond to the research questions, it does place a constraint on the interpretation of the data.

Easterby-Smith et al. (2008) suggest that validity, reliability and generalisability mean different things within different research traditions according to the philosophical stance underpinning the tradition. They argue that within constructionist viewpoint validity is measured in terms of gaining access to the participants' experiences; reliability is built upon the transparency about how sense is made from the raw data; and generalisability is concerned with relating the findings to other settings.

Lincoln and Guba (1985, as cited in Bryman and bell, 2003) advocate four criteria for judging qualitative research. These criteria are credibility; which asks how believable the findings are, transferability; which considers whether the findings can apply in a different context, dependability; which enquires about applying the finding at other times, and finally conformability; which considers if the researcher has taken account of his/her own influence.

Judging the quality and limitations of this pilot study should take into consideration the above points. The researcher has provided the raw data prior to any data analysis and was transparent about the way he coded and interpreted the data. The researcher also has attempted to present his prior assumptions seeking to account for his own influence on the findings. And the study provides insights into the store manager's own beliefs and experience. However, this research does not make any claims of generalisation (Easterby-Smith et al., 2008), nor of transferability (Lincoln and Guba, 1985) of the findings. The choice of using single case study design and focusing upon single unit of analysis does not allow such claims. This pilot study allowed the researcher to test the methodology and practice the methods of data collection, within the given period, in preparation for future research.

5.4 Three main themes from the data set

Although the three themes presented here do not fully cover what emerged from the data, the researcher had to make a conscious choice of what are the prominent topics in relation to the research questions following Yin's advice (Yin, 2003).

5.4.1 Not one strategy, but two!

SM1 reported OPTIKA strategy is to provide not only direction but also tools for its members. Moreover, he thinks that this strategy ultimately serves to grow the business year-on-year. However, SM1 sees two types of strategy in OPTIKA. The first, an overall strategy shared at the organisational level. The second is a localised version of that overall strategy. While this localisation was seen in the literature as a source of conflict of interest between the head office and the store (Chang and Harrington, 2000), SM1 thought of it as supporting and following the overall strategy.

“... you’ve got the strategy of the company and then you’ve got your own strategy and how... you’re gonna follow... the company strategy...” (Appendix D: Interview transcript)

This localisation occurs due to the unique nature of each store, namely its staff and its customers. Garvin and Levesque (2008) saw this issue as a challenge that faces OPTIKA because of its structure. SM1 gave many examples including how he sets best-practice targets and focuses on improving staff skills, instead of relying solely on the company set monetary targets to monitor performance in his store:

“you... follow the strategy of the company as much as you can... but some times... in order to... follow the strategy of the company you have to... kind of have your own strategy... because your team will be different... mmm... your customer’s base will be different...” (Appendix D: Interview transcript)

Localisation is highly reliant upon the personal qualities of the store manager and involves trying different approaches. In addition, localising the strategy follows a different process in each store and SM1 achieves OPTIKA's strategy via adapting and changing his daily practices

"I changed, the way, I would do things... like in *[location 2]*... I hardly ever wanted to give discount out, you know you don't have to because people there have got the money...mmm ... you know... your average order 270 to 290 [UK pounds] and you're coming here... and the average order is 180, 190 and everyone wants discount, it's different..." (Appendix D: Interview transcript)

Finally, the extent to which a store manager is able to localise the overall strategy relies on his or her performance. SM1 recalled his experience in a different store, and how a previous boss did not interfere with his activities at that store.

"he left me to it as well... because *[location 2]* was the only one who's making plan in his region... and...my...*[previous regional manager]*... you know... he... he actually probably... gave, us, more, sort of, or me, more... sort of...leave him to it kind of thing...let him make decision" (Appendix D: Interview transcript)

5.4.2 The store manager's unconscious strategic agency

The data indicates the following contradiction. SM1 expressed his view on a few occasions that he cannot change OPTIKA's strategy. He cited a recent event in

support of his view. The event is an unsuccessful attempt by professional personnel to resist using a strategic tool that was introduced by OPTIKA's head office six months ago.

"I know you're trying to get... ahhh... how do I... do strategy myself... but it's like I said... it's dictated by the company... so ... strategy almost is... I guess dictated is quite a harsh word... but it's more like... you... you don't have... the scope to change... the company's strategy..." (Appendix D: Interview transcript)

Furthermore, he sees strategies formulated and developed at a higher level in order to include and accommodate different perspectives that store managers fall short of seeing. However, higher management, he reports, are absent from the shop floor and unaware of the daily activities when they formulate the overall strategy

"although it's just us in the store... we know what's going on... but people, above you... don't... umm... in the store" (Appendix D: Interview transcript)

Nevertheless, he discusses on many occasions how he can influence the implementation of the overall strategy through the localisation process. For instance, when the researcher prompted SM1 if following standardised procedures contradicts localising the strategy; SM1 replied

"you've got the tools... the way you apply it... has to be specific to the place where you work" (Appendix D: Interview transcript)

Furthermore, during the first meeting SM1 was able to tie everyday activities to strategic KPI's. He also discussed optimising everyday practices to comply with OPTIKA strategic directions in the second meeting. Moreover, SM1 considers breaking down strategies to operational daily activities for the team, his job.

"it is, I mean I guess it is my job to break it [strategy] down, I think... aaa...I don't want, to, insult, the, intelligence of, of the, team ... I don't ... I think everyone here, or in this team at least... knows, what they should be doing..." (Appendix D: Interview transcript)

In addition, the whole of the first meeting and most of the second were dedicated to discussing a mystery shopper report: a benchmark practice used by OPTIKA to measure compliance with its standards. SM1 was able to link that routine practice with one of the strategic goals of the company. The strategic goal is to provide an excellent customer service. This goal was introduced when OPTIKA was bought by a holding company twelve years ago.

"The same team was attending, the meeting was a follow-up from the first one, mainly discussing the same mystery shopper report. Last meeting ended abruptly and SM1 wanted to continue the discussion. Clearly, this is an important report / tool I must ask him in the interview. Not sure if it is important in the company or for SM1 only." (Appendix C: Notes from the second meeting)

And then:

“TE: ahhh, we... you did speak a lot about, in the two meetings I've attended, it was about the mystery shopper, wasn't it?”

SM1: mmm were they? (laughs)

TE: how, how do you think that links to the whole... process

SM1: what it, what it is, I mean, I, again, it's not, it's not, I can do a long plan, and how are we're gonna get there, all that whole half an hour, but... a lot to do with the company's customer service, and that's my pride...” (Appendix D: Interview transcript)

Recalling Johnson and his colleagues' definition of strategic practice (Johnson et al., 2007), the daily activities that SM1 connected with OPTIKA strategy can be an activity he engaged with, such as the mystery shopper or giving feedback, and an activity he does, like deciding on how to localise the strategy to his own store.

Recently, OPTIKA strategic focus has shifted to converting customers rather than previous focus on selling high-end products. During the second meeting, SM1 invited the team to reflect on the tools that are available to the staff to convert people; varying from software, quality of OPTIKA's products and services, loyalty cards... and so forth. Although he did not spell out that converting people is the new strategic goal, SM1 successfully described the localisation of the strategy by using a set of techniques to achieve that focus.

“there are more than ten things... to say to patients, look, this is what we offer, and this is what we do” “we have to make the most of it.” (Appendix C: Notes from the second meeting)

While SM1 is not aware of his strategic agency, he clearly is engaged in strategising (Jarzabkowski et al., 2007) and can be considered as a strategist (Whittington, 2006; Jarzabkowski and Spee, 2009).

5.4.3 Communication, communication, communication!

SM1 states that strategy is communicated through three main channels: in person during regional monthly meetings, by hard copies or memos, and via emails. The choice of method is dependent on the required urgency of the implementation. Moreover, to obtain clarification, store managers can contact either the regional manager or the person responsible at the head office. The ability to contact the head office directly indicates channels of communications outside OPTIKA's formal hierarchy of reporting to the regional manager.

“again it's important to know, and build a rapport with the support office as well... because it helps you... get the best out of them... to help you... in the store...”

(Appendix D: Interview transcript)

Hence, it is important for SM1 to work on communication lines with other departments at the head office even though SM1 is used to operating with ambiguity about who is responsible for what at the head office.

“like our PDQ machine broke down the other day... and there’s no communication on, who deals, with UK stores...” (Appendix D: Interview transcript)

Furthermore, SM1 conveyed a new procedure to his team members in the second meeting not only by presenting the physical document which was sent from Head Office, but also by explaining the reasons and the long-term results of adhering to, or refusing to comply with, that procedure.

“SM1 announced that there will be a new company’s procedure, telephone mystery shopper, which is separate from the general mystery shopper report and that is “actually... twice as long as the original” (he giggles)” (Appendix C: Notes from the second meeting)

In addition, later on during the interview, SM1 cited two loops of feedback communicated at two different hierarchal levels. The first exists between him and his team and in fact was witnessed by the researcher throughout the second meeting. The second feedback channel is present at the regional level where the regional manager collects feedback from the store managers. Within the regional level, store managers can object to and negotiate any strategy implementation, or localisation, issues with their regional manager. Full justification is needed in order for the regional manager to support any objection.

“communication...backwards... isn’t as...mmm ...like from the store level to the support office isn’t as...good I would say as the other way around then yeah... it could be a little bit slow for them to... to react on... I mean... [*regional manager*] is

there to... to tell... if you need, to, to tell them look it's too much for us, we can't do this right now... we can get an extension, and stuff like that... even he will fight your corner as long as you justify why you can't do it... and he's kind of in the middle where... he's been in the store he sees what it's like... he knows what we can and we can't do and then he'll challenge you... cause that's his job... to challenge us" (Appendix D: Interview transcript)

Additionally, besides the multi-unit enterprise structure of OPTIKA, stores are clustered for operational purposes in performance groups and senior management communicates selective information inside each group. Stores that belong to the same group are also benchmarked against each other. Nevertheless, the regional division dominates in any form of horizontal communications and work activities.

"in the yearly conference... you're still in your regions... you do meet different people yeah... but it's not like you... you have meetings with different region... [...] all your work group and stuff... still within your region..." (Appendix D: Interview transcript)

5.5 Implications

SM1's view on strategy does not match any of the ten schools provided by Mintzberg et al. (2001); SM1 talked about two strategies, one of which is localised to his store environment. The necessity of this localisation can be attributed to the fact that human beings are different in different locations, namely staff and customers. Moreover, SM1 needs the interaction with other humans in order to

both create this local strategy and implement it. This interaction includes collecting and communicating feedback. In addition, the ultimate goal for these local actions, in his opinion, is to achieve OPTIKA's strategy, and every company's strategy for that matter, of growing the business. Strategy is reported in this study as a "situated, socially accomplished activity" (Jarzabkowski et al., 2007, p.7).

SM1 reported that his daily activities shape a localised strategy when put together, that supports OPTIKA's organisational strategy. He talked about these activities as something that he does, such as setting targets for his staff members and delegating tasks, and as something that he is involved in, the discussion of mystery shopper's report for instance. SM1 also discussed the importance of the available tools to achieve his store's strategy. In his narrative, SM1 did not indicate any flow of activities, or what Whittington (2006) refers to as praxis. Moreover, he failed to recognise his strategic agency. Thence, SM1 could not relate his actions to the integrative framework of practitioners, practices and praxis, which supports earlier claim in this dissertation that this framework is theoretical rather than empirical. This dissertation, therefore, invites the researcher to find an alternative theoretical background for the successive piece of research.

Even though SM1 failed to acknowledge his strategic agency (Mantere, 2005; 2008), he was clearly able to describe his identity as a strategist linking his daily micro-activities (Johnson et al., 2007) to the overall company's strategy. Closer examination of these reported micro-activities suggests that while they mostly relate to the implementation of an overall organisational strategy, they also relate to the formulation of a localised strategy. The micro activities at this level seem to have a dual nature of both implementation and formulation in strategic terms.

These new insights support the rationale to study strategising among store managers.

Findings related to communications issues echo Garvin and Levesque's (2008) challenges for the multi-unit enterprise structure. Strategy, as a social accomplishment, was achieved through communications and interactions between SM1, his colleagues, his superior, his team and the people who work at the head office. Samra-Fridricks (Samra-Fredericks, 2005) looked into details of communicative actions at top management level using discourse and conversation analysis. Moreover, Jarzabkowdki and Spee's review of the SaP field (Jarzabkowski and Spee, 2009), discusses studies that looked at strategising at three different levels. However, there is a need to understand strategising as a shared activity among different level of organisation in order to link the micro and the macro.

Using semi-structured interview in this study allowed SM1 to reflect on his practices and to report this reflection. Observations, on the other hand, provided a live account on strategising as it is happening. Samra-Fridricks (Samra-Fredericks, 2003; p.142) did discuss looking at "strategy as a lived experience opposed to a reported experience". The emphasis on the "lived experience" should be a distinctive way in which SaP add to our current state of knowledge. Observations are rich source of data on strategising in the make and should be employed extensively. In addition to observations, the researcher will negotiate using video recoding as a data collection method in future research. Like audio recording, video recording is an unbiased account of the events. It also allows the researcher to review the recording for any data that he may have missed initially.

Finally, this pilot study supported some claims that was made earlier, strategy is social practice for example, and highlighted some important issues to consider at the successive research, the unconscious strategic agency for instance. But most importantly, it was a learning journey for the researcher in preparation for the full-scale research that will follow.

5.6 Conclusion

Conducting this pilot study allowed the researcher the time to look for and to read textbooks on academic research. The advice in these books included, but was not exclusive to, planning the research, negotiating access, considering ethical issues, getting funded, choosing research strategy, selecting research methods, collecting and analysing the data and writing the dissertation. These recommendations were valuable in terms of describing best practices under ideal conditions; that is when the research activities happen according to the initial plan. However, reality is different from these text books and researchers should be flexible in respond to the unforeseen changes. For instance, observation notes, according to most text books, should include every detail of what had happened. While this is desirable, Chapter Four discussed how difficult it was to catch every little detail (body language, expression, sarcasm and so forth). The researcher responded in the second meeting where he set his primary focus on issues related to strategy. Therefore, constructing good research questions is important to guide the research process, but it is crucial to focus on the significant aspects during the data collection phase.

Networking with other researchers from similar disciplines provided useful insights into how researchers go about unforeseen changes in the research environment. Management and business research have similar challenges in gaining access and limited control over corporate environment. The supervisors and PhD students within the Open University Business School provided valuable real-life examples from previous experiences. Discussions with students from different institutions offered a rich account of current research activities and contemporary topics of interest among scholars. Equally, discussing the research subject with research students from different disciplines exposed the researcher to variety of perspectives on data collection and data analysis methods. It also facilitated gathering critical views of the research topic. These networks were also effective in providing support and encouragement in the difficult times, in addition to sharing good research practices.

At the beginning of this study, the researcher was unable to establish links among his philosophical stance, the current literature, the available methods and the topic of interest. He learnt during the past year to bring all these elements together in order to serve the study objectives. Accepting critiques by colleagues and accounting for that critique in both the research approach and the written report is another important learning outcome. This learning involved accepting that academic studies are judged not against perfection but against what type of knowledge they are expected to produce, and that criteria of judgement should be related to the chosen methods in addition to the concluding findings.

Relating the researcher own experience to the research objectives was a simple task. On the contrary, understating how this experience is influencing the data

collection and the outcomes was a complicated one. Appreciating reflexivity and the ability of previous thoughts and beliefs to influence the interpretation of data took a long time and extensive reading. Social sciences are different from natural sciences because they involve humans and their ability to think. This thinking draws upon the individual's experience and hence can not be detached from emotions and beliefs. Observing reactions between two chemical elements in a laboratory is entirely different from observing interactions between two individual in a social context. While the first can be examined objectively, the second observations cannot be separated from the observer. A further difficult task was aiming to be explicit about implicit knowledge gained whilst working at OPTIKA. Attempting to discover the researcher's prior assumptions during the writing of this dissertation brought him one step closer to tackle this issue.

Finally, this pilot study was a positive experience and resulted in some exciting outcomes. This was an opportunity to learn and practice academic research. Additionally, the study findings encourage exploring strategising among store managers, which will be the topic of the next piece of research.

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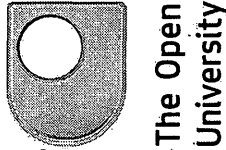
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7 Appendices

Appendix A: Consent form

Consent to participate in a research project:



Business School

The Open University
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 Walton Hall
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 Fax+44(0)1908655898
www.open.ac.uk/oubs

Dear Store Manager,

Thank you for agreeing to take part in this research. I am looking at what store managers consider as strategy and how their daily activities can (or can not) influence company's strategy. I am at the final stage of my Masters of Research and the data will be used mainly in producing my dissertation, but may also be used for academic publications.

You and your store participation are very valuable and any contribution will be kept confidential at all times. My dissertation will present only part of this participation in a way that no link between the data and you/your store can be established. The digital audio recordings will be stored mainly on a secure server, or otherwise in encrypted form in accordance with the Open University code of practice.

While most people find it interesting to be part of a business research, your participation is voluntary and you may ask to stop the recording or choose not to answer any question during the interview. You may also ask me to stop at any point while I am observing your weekly meetings. Finally, your consent can be withdrawn within one week by writing to me.

You are very welcome to read an early draft of my findings. If you wish to do so, please provide your preferred contact details. You can also discuss my research with anyone else including my supervisor Dr Alex Wright, who can be contacted at a.d.wright@open.ac.uk or via telephone 01908 655 878.

Thank you again for your time and support.

Yours sincerely,

Tamim.Elbasha (t.elbasha@open.ac.uk)

I agree to take part in the research outlined above.

Signature:

Date:

Preferred contact details (optional):



The Open University is incorporated by Royal Charter (RC 000391), an exempt charity in England & Wales and a charity

Appendix B: Notes from the first meeting

SM: Store manager

TL: team leader

AP: associate participant

PP: professional participant

ASM: assistant store manager

Meeting took place on Sat 7th July @ 8:30. The store manager was a bit anxious about me recording the meeting, I reassured him that there is nothing to be 'ideal' and that there is no 'correct' way of doing things and I'm not here to judge him. Seemed a bit more at ease after hearing that. He had a quick look at the consent form, and said he will read and sign it after the meeting.

I was wearing a company's badge, casual cloth. The team was friendly and asking about my newly born son. I know everyone personally. Explained why I'm here and what I will be doing. Asked their permissions for the photos, all agreed and then started to joke about how famous they will become after publishing their photos. I have intentionally left a gap between my position and the rest of the team, around two meters, setting outside their oval-shaped positions

The meeting was conducted in the shop floor not in the staff room, everyone was waiting for a late member of staff, SM1 decided to start the meeting. The recorder was very small, the size of a car key only. It was placed in front of SM1, people were seated in an oval-shaped settings, they sat around two sales desks.

SM1 started by giving out some paper, people didn't know what it is at first, they then discovered that it is sections of the quarterly mystery shopper report. SM1 divided the report into sections, I guess 6 or 7, and gave them randomly to people, (I need to ask him if that was random or not actually).

SM1 tried to engage the team: "what do you think we had?" and "what was it [the score] last time?" the score was far lower than the last time and therefore SM1 said "so, we will go through it one by one, each part, and then we'll talk about what went wrong, what went well, how we are going to change what we did to make it well, and who remembers our target?" people were reluctant to engage, ASM1 was eating cereals, TL1 and other member of staff were eating croissants, SM1 had a hot drink in front of him. The only person who started an effort to respond was the late member of staff. SM1 set a frame for the conversation, he will discuss the report to improve things and reach the shop's target which requires a 11% increase in the score.

He asked ASM1, who sat to his right, to start. She stated the title of the part she has got and read from the paper. SM1 asked her to start by stating the score, then to go through the details. AMS1 read from the paper. People were listening and looking to the ASM1.

As ASM1 finished her reading, Professional Participant1 PP1, an experienced professional member of staff, immediately sounded disagreement about this section: "correct me if I'm wrong, but if the appointment was made on the day, why would we confirm that appointment? For a start..." SM1 said that we don't know if the appointment was made for that day or not, and mostly it is not, he asked the team to presume that it was made couple of days before as most appointments.

SM1: "What is our learning from there, what didn't we do?"... TL1 responded : "ask more questions". "right...", agreed SM1, TL1 then suggested some questions. SM1 confirmed and

repeated, "what else" he asked, other members of the team started to respond stating detailed points, SM1 was explaining how to justify the cost of a certain service, staff members were objecting in non-verbal ways... SM1: how we justify the cost of [service]? PP1 responded, "it's a thorough [service]", SM1 "using the...?" TL1 "latest technology" in a reluctant tone, another participant was smiling... SM1 justified, "it might be not the latest, but comparing to other opticians... we have properly got better... up-to-date equipment."

PP1 in sarcasm: "we have more than 200 different ways of doing the [service]"

A discussion about how to over-come price objection among staff and SM1 took place. TL1 stated a new point to discuss: "the more you ask, the less time you have and some customers go on for long time about answering the questions" SM1 clarifies that a closed questions can be used. The point was supported by other members of staff including ASM1 and PP1, making a jock out of it by PP1 "[addressing the customer] and by the way, your [service] will take less than your telephone call"

SM1 interrupted, and asked about some future points that should be included, a member of the team made another jock. "Joking aside!" SM1 said with a slightly higher tone. Then he repeated the question. TL1 suggested the loyalty card and SM1 nodded positively.

ASM1 glanced at the paper and said "The name... no name was mentioned" people agreed that the name of the person answering the phone should be stated. SM1 then made a joke about one member of staff who doesn't answer the phone. PP1 joins in and most people laugh. The team spend 8 mins discussing this point.

SM1 moved the discussion to another point, asking the next person PP2 to state the score "we've done very well"... Asking the person to read it quickly. SM1 declares that nothing much needs to be discussed and asks to move to the next section after less than a minute.

Next person was PP1 to read another section covering another area. SM1 asked if we know who's done a certain task within that area where the store stored maximum points. PP1 found that AP2 was the person who completed the task. AP2 was present but clearly not focusing, everyone looked at AP2 and she was surprised asking "what? What is it?" PP1 explained while AP1 laughed.

SM1 Asked PP1 to move to the second part where AP2 has helped the mystery shopper and the store scored badly. PP1 sarcastically announce that the store lost points because "we didn't offer refreshment, OH MY GOD!" SM1 tried to illustrate how important that is while everyone is still making jokes about it, SM1 explains that it's the team's responsibility to offer hot drinks because of "because it's hot.. they can easily... somebody stupid can put their hand and scalp their hands" PP1 makes another joke: "it's quite a complex machine though" people laugh and SM1 tries again to be more serious... SM1 concludes "if it's a water, fine" "but if it's a hot drink.. then we can do them for them"

SM1 asks to move to the next area. AP2 read the section, SM1 stated the reasons for missing the points. Asked AP2 to join and remind him with the last reason he had just cited. ASM1 joined asking why the right questions are not being asked confirming that it's a persisting problem. PP1 complements TL1 skills in asking the right questions drawing on her own personal observation. SM1 elaborated "it's not so much what you don't write, it's what you ask... for example...." SM1 then explained how asking the right questions can improve store's KPI... team is listening but not joining in. SM1 continued. PP1 explained another benefit from asking the right questions related to her task in the store, "if we are running behind". SM1 suggested another practice in such situation "apologies when we're running late". SM1 stressed communication with customers, PP1 supported him. SM1 asked "what we are gonna do in [the practice that had just been discussed] now?" TL1 answered "ask more questions", "what kind of questions" SM1 asked, TL1 answered reluctantly.

SM1 asked also for a certain field to be filled in (in a software) when completing that practice. PP1 confirmed that the exact field suggested will make professional members' task easier as this will save them re-writing. It has been more than 15 minutes since the beginning of the meeting and people lost interest.

SM1 asked the next person TL1 to read only the negative points in his paper. Showing no interest in every little detail anymore. People were interrupting, but TL1 continued to read... PP1 got defensive as she is the person who had provided the service the topic of this section. SM1 didn't interfere. At the end, SM1 asked about the learning points, other member of staff reminded him that this is only half of the whole section and that AP1 had the rest of it. "ok yeah.. continue yeah..." he had clearly lost the track. AP1 said that there are no negative points on his part. SM1 asked "so we didn't mention [product 1]?" TL1 and PP1 disagreed "we DID mention [product 1]!" ASM1 explained more details. TL1 stated more areas that had low scores in the report, PP1 continued to be defensive. SM1 summarised the learning points, AP2 and PP1 are still defending their actions. TL1 joined the discussion, suggestions were provided by the four of them.

SM1 asks to move to the next section, his body language seemed to be artificial but showing engagement with the reader AP2. AP2 read the paper in her hand. PP1 asked why the store lost points, SM1 started with the first point about offering a product 2, and he thought that losing points didn't make sense in relation to the rest of the report as the mystery shopper needed different type of products. SM1 moved to the second point, elaborated a bit and explained how things should be done linking it to the previous practice 1. He also cited examples.

He is aware of the time by now, the store is due to open in two minutes, he pressed AP1 to read the missed points from the last section. AP2 read out. AP2 was laughing as he was reading, two other laughs are heard. The report asked if the assistant was engaged with the mystery shopper and being enthusiastic. TL1 was the assistant at that occasion and he sarcastically "I'm not gonna go, OH MY GOD BUY THESE" everybody laughs, SM1 said "yeah but it might help". ASM1 supported SM1. SM1 gave an example of how it could be done... TL1 responded defensively and justified his action. SM1 disagreed, TL1 tried to argue but SM1 continued with a slightly higher tone preventing TL1 from arguing. SM1 told TL1 to seek help from his colleagues if he is struggling with this issue. SM1 doesn't like TL1 body language, he asked him "no? yeah?" TL1 replied "ye..ah.... depends on what situation we are in" the argument continued between the two until AP1 interrupted shifting the focus to another point: the final cost of the product. AP1 read from the paper in his hand, SM1 explained how this is related mainly to closing the sale and linked it directly to his earlier discussion with TL1 using even a higher tone. A pause lasted for few seconds marking his domination of the conversation. SM1 elaborated about closing the sale. AP1 replied and argued about the cost, while SM1 linked it again to the earlier point he was arguing with TL1 and spelt the link out "there were no input from us" and elaborated on that to specifically how to address this issue. AP2 seemed convinced with this justification. SM1 continued explaining. ASM1 contributed by suggesting another way of closing the sale and overcoming objection on price. SM1 read briskly from the report. He acknowledged the need to open the store immediately, he tried to wrap up quickly but the team is packing up and everyone is moving around. SM1 apologised "sorry guys will continue this another day." The meeting ended abruptly.

It feels like they have to do it, no one is enjoying it! Everyone is defending his/her own practice and SM1 tries to explain, justify and convince the team to accept the mistakes they made and try for a better practice. At the end he gave a big sigh while raising his eyebrows. He was not satisfied and looked as if he is feeling board from the repeating the same thing. Is that 'same thing' is the meeting itself or arguing with the rest of the team? I'm not too sure.

Also, two members of the lab team arrived late, they weren't engaged and did not try to participate. They sat next to me actually about 1.5 meters away from the oval-shaped format.

Appendix C: Notes from the second meeting

The second meeting took place on Sat 11th July 2010 @ 8:30. In the pre-testing room, a new piece of hand-written paper specifying what to ask in practice 1 (referred to earlier in the first meeting) appears now next to the keyboard. The same team was attending the meeting was a follow-up from the first one, mainly discussing the same mystery shopper report. Last meeting ended abruptly and SM1 wanted to continue the discussion. Clearly, this is an important report / tool I must ask him in the interview. Not sure if it is important in the company or for SM1 only. PP1 was having her breakfast. The setting was slightly different, it was more spread out and less concentrated, it spanned over 4 desks instead of two. My own position contributed later to spread it over to 6 desks because all the late comers sat in the area around me. I have intentionally left a gap between me and the rest of the team, around 2 meters, setting outside their oval-shaped positions. However, all the late comers did not involve in the conversation, two of them were from the lab team, and the third was a locum professional member.

SM1 asked people to remind him of last week's discussion, focusing on actions and "what we are gonna do differently". "we'll ask more questions" AP2 responded. "what kind questions" SM1 asked people to join in and be more involved. The team responded and gave more details. SM1 asked for a role-play to pin down the questions and illustrate the actions everyone required to implement.

SM1 appointed TL1 to be the "patient who is objecting to the sales" AP1 interrupted asking to be the patient, SM1 ignored the voice and asked AP1 to be the associate. TL1 reluctantly said "go on then..." SM1 wanted TL1 to be more serious "is that how you sit?" he interrogated "that far apart?" the team laughed. AP1 wanted more details where to start. SM1 instructed them to jump to the closing of the sale where AP1 explains the cost of the products and services to TL1 who is playing the role of a patient.

AP1 started, the role-play continued and AP1 was taking it seriously while TL1 was not very involved. SM1 presses "pretend that you're a genuine customer". TL1 refused "but I'm convinced". Laughs. SM1 insisted on involving him. "let's switch now" asking TL1 to be the associate. TL1 started listing the prices. AP1 stated objections, TL1 responded. AP1 objected on the price of the primary service OPTIKA provides, TL1 responded in accordance with the company's discount policy.

SM1 invited debate in relation to the role-play "does everyone agree with that?" "would anyone think we can do better?" "Were you convinced?" ASM1 discussed a point, SM1 commented. ASM1 invited discussion to another point of objection. SM1 offered a solution to that point of objection, AP2 asked for more clarifications. PP1 joined in giving more advises.

One more point of objection was discussed where SM1 asked the team to use a more medical and professional term to describe a certain service instead of using a very simple reference: "digital retinal photography" instead of "the photo we took in the room". SM1 explained that the team could explain if the customers demanded clarifications about the term. PP1 interfered with a funny comment. SM1 joined laughing. "just little things like that to change the perception of the customer, so..." SM1 concluded this point.

SM1 asked the team to add more points "anything else?" PP1 gave an advice on downgrading to a cheaper product to respond to price objection. SM1 expanded on that and told the team to remind the customers that the expensive product is their own choice. "you've chosen the top-range".. "the whole point of OLR and OLS is that they're [customers] making the decision"

SM1 reminded everyone about the report emphasising the areas where store lost points. He referred to the discussion they had so far as asking them to take actions to score more points in "closing the sales" section. He also reminded the team of the actions they are supposed to take to improve another area, practice 1. The team gave examples of the questions they are supposed to be asking. SM1 seemed less focused on the discussion "sorry, I thought you are going on..." PP1 made another funny note "are you a mystery shopper?" everyone laughs. SM1 tried to end that joke, but PP1 and ASM1. SM1 does not seem to mind, until AP2 asked for clarification about an earlier question. SM1 answered with an example. SM1 pushed the team to remind him of justifications of charging higher price for the main service OPTIKA provides "using the latest technology" "with fully qualified [professional]".

SM1 announced that there will be a new company's procedure, telephone mystery shopper, which is separate from the general mystery shopper. "which is actually.. twice as long as the original [he giggles]"... the team did not seem neither supportive nor happy with the news. SM1 presented the 'telephone mystery shopper' report template to the team. SM1 wanted to brief the team with what they are expected to answer. He read from the template, people are not focused; TL1 is working on some paper work. SM1 explained further and gave more details. "I'll leave this on the table anyway so you can go through it" he said feeling the team's interest fading away. Someone asked a detail, SM1 re-start reading giving examples, he laughed ironically as he reads. "it's long, isn't it?" TL1 commented. PP1 objected as SM1 said that it is required from everyone to cite both minimum and maximum prices of the products and services. She is concerned that customers will choose the cheapest options. SM1 explained that the idea behind that is to "get them to come-in... and then we can talk about why our lenses... why they can go for better quality lenses... because we've got the means to do it..."... "It's a catch to get them in" He also insisted that if a customer comes in specially for the cheapest option, then the store still makes money because this type of customer wouldn't have come-in in the first place if they didn't know that OPTIKA offers products at that price. PP1 asked "so for every new patient, should we treat them like mystery shopper?"... "this is how they want you to do that , yeah" SM1 responded. SM1 expanded that if the store scores high on these reports but still not achieving sales plan, he can turn around and say that they are "doing everything that the company wants us to do".... "this is supposed to be tried and tested means"... He the wrapped up saying that in that case, he will not be heavily criticized for not making sales targets, PP1 commented "you won't lose the job?". Few joking comments came from PP1 and ASM1.

SM1 clarified that the mystery shopper will prompt most of the points during the telephone conversation. He also gave hints focusing on new customers... "it's all about the invitation and once they're in... we've got the means and the tools to convert them" he summed up. He asked agreement from the rest of the team twice, no one is interested or convinced, someone agreed to him "yeah... yeah..." He asked everyone to read the template during their lunch break, and announced that he will be asking his personal friends to call the store and score the store using that template. The team suddenly is more alerted. AP1 interrogated and asked for more details about the last comments, SM1 answered that he is not sure, he sounded like he just thought of that idea. SM1 justified his actions as the only way to know before the next actual telephone mystery shopper report comes through with low score. AP1 now is interested and asks more questions, SM1 answered them and commented on other points in the template.

SM1 then invited the team to reflect on the tools that's available to the staff to convert people; varying from software, quality of the service and products OPTIKA offers, suitable prices, loyalty cards... "there are more than ten things... to say to patients, look, this is what we offer, and this is what we do" "we have to make the most of it."

SM1 announced a new procedure that “came from the head office” in link with a new loyalty card scheme. He used the term Head Office even though OPTIKA insists on using another term instead, which is ‘the support office’. The procedure should be read and staff should initial their names on the documents, he read and explained some of the main points included, employees are asking details, and SM1 replied and justified, giving practical solutions to some anticipated problem related to the procedure. He explained that for those who do not comply there will be disciplinary actions because it costs the company money. The team seemed surprised and SM1 communicated the cost of the new loyalty scheme comparing it with more known points-based loyalty scheme.

He asked “so any sort of other business, before we get to work today? who knows our plan today?” he communicated the need to do more than the planned sales to catch up for the loss during the week. He then linked this higher target to the previous ten tools that he had mentioned earlier. He also linked attitude to losing some points in the report. He then asked people to repeat the daily targeted KPI’s and made some jokes.

“Let’s get to it, thanks guys” and the meeting ends.

Appendix D: Interview transcript

Interview took place on Sunday the 25th July 2010 at 9:45, before the opening of the store.

TE: Thank you very much for meeting me Sunday morning... ahh... *[name of SM1]* I just, can I just ask you what, ahh, you’ve been with the company for how many years now?

SM1: five years...

TE: Five years... and how many of them you’ve been... manager and assistant manager

SM1: I’ve become an assistant manager... in *[location 1]*... in two thousand... and... six, yeah, two thousand and six...the end of two thousand and six and then ... end of two thousand and seven... I was the store manage in *[location 2]* street...

TE: yeah..

SM1: and I was there for two years... two and a bit years... then I came here February... march

TE: march... that’s...yeah

SM1: yeah...

TE: so you’ve been in management for a while...ahh... just how... how the word strategy... what does it mean to you... in

[OPTIKA]...does it trigger anything? Does it not? What you think?

SM1: it’s direction isn’t it? It’s like... what, where the company wants to be and what... and what they want you need to do...

TE: yeah...

SM1: in order to get there...mmm... that gives us... two folds isn’t it though?

TE: yeah...

SM1: you’ve got the strategy of the company and then you’ve got your own strategy and how... you’re gonna follow... the company strategy

TE: okay... so...

SM1: I guess (laughing, and eyebrows up)

TE: (laughing) so that..

SM1: you’ve never heard that before, have you?

TE: so that is on a store level then?

SM1: hey??

TE: is it on the store level? So you’ve got strategy of your store... and then strategy of your company...

SM1: yeah, I guess so! I mean... you... you... follow the strategy of the company as much as you can... but sometimes... in order to... follow the strategy of the company you have to... kind of have your own strategy... because your team will be different...mmm... you're customer's base will be different...

TE: mmm

SM1: so you have to... apply... the company strategy.. in order to... in order to follow it you need to apply it in a different way....

TE: okay...

SM1: according to who you work with... I think

TE: okay... mmm... do we have... in the company... do we have one strategy or more than one strategy? How do you see it? Do you see it...

SM1: at the moment, probably.... there is a few strategies going on (laughing)

TE: yeah...

SM1: yeah...

TE: yeah...

SM1: but I think... that is because... there is different... different departments wanting to achieve.... different things...

TE: aha..

SM1: and... in this time of... you know... when.... Sales are short... and stuff like that, it's kind of... it's not as the way it used to be where it used to be one thing at a time... they wanna try to... do as much as possible to try and... shift things round... you can see it from their point of view... why they do it

TE: they are doing it...

SM1: yeah...

TE: you think they are doing it because they're responding to... external... crisis... money financial crisis or is it internally we haven't.... we hadn't done good so they are changing...

SM1: yeah... (interrupting) I don't think it's... I don't think... I don't think we're doing as good as they'd hoped we're going to do....

TE: mmm...

SM1: but... I don't think... in the same respect that... it's the financial crisis...

TE: okay...

SM1: because if.... the company is still doing well...

TE: mmm

SM1: but relatively... to what they've done in the past... they are not doing well.

TE: mmm

SM1: if that makes sense...

TE: yeah...it does... it does... and... you know all these strategy, strategies the company is...

SM1: yeah...

TE: how do they communicate it? Do they do it... through emails? ... do they do it personally? Do they do it...

SM1: mmm... they... well... we have monthly managers meeting...

TE: aha..

SM1: so..

TE: that's the store managers' meeting?

SM1: yeah... so it's the review... it's the... operations review

TE: mmm

SM1: that we're going through... so in there details of what's... coming... things will be... or what will be happening... and then when it's, when it's being implemented you get the... memo's and stuff through emails..

TE: mmm

SM1: sometimes through hard copies... depending on how quickly they wanna move

TE: and can you refer back on these to... somebody else? Or... do you have to figure it out yourselves? So if they say you need to...

aaaa... satisfy customers... do you do that on your own ...

SM1: yeah yeah (interrupting)

TE: or do you...

SM1: I don't think you need a memo to satisfy...(laughing)

TE: yeah...

SM1: if that's the example...

TE: yeah...

SM1: mmm I mean, that for you isn't it really...mmm... I think...what... ahhh...i mean if they

TE: give me an exam... yeah

SM1: for example promotion

TE: for example yeah...

SM1:mm then, yeah.. I would be expect it... to be... you know... methodically thought out...and...

TE: mmm

SM1: and ... mm... so that...you and your associates know what you're doi... what the promotion limitations and restrictions are... so that you're not looking like... when the customer confronts you saying, this, this and this..

TE: mmm

SM1: you can say actually, you can't do this, because it says here and here and here, as oppose to thinking oh I don't know... if you can or can't.... were if it is something to do with...as...as... I think as general as customer service... I think that's...or satisfying customers that is on a specific level isn't it?

TE: yes..

SM1: everyone's satisfaction is different

TE: is different yes...

SM1: everyone's satisfaction is different...

TE: absolutely... and why do you... I mean you've mentioned earlier that you implement the strategy but as... you implement it, you

localize it to your store... your area... because of the customers, because of the, things you've mentioned...where do you fit in... in that process, is it... can you change the strategy totally so if they say...

SM1: no no

TE: no..

SM1: I think the ultimate strategy is what the company wants you to do...

TE: okay..

SM1: but how you do it... is... I guess... like-for-like, or being specific to... so the ultimate goal has to be the same

TE: okay

SM1: but how you... implement it, well... may be different

TE: and the company will encourage you to do that? Basically...

SM1: mmm

TE: as long as you...

SM1: yeah I mean... as long as you... you're not deviating far away from... the process...

TE: mmm

SM1: if that makes sense... and you don't... and you know... you're not being too radical...

TE: yeah...

SM1: radically changing things... but I don't think you can, in order to... if you...mmm... yeah.. I mean if you wanted to change the strategy then you can... do that, BUT... you can't... so...

TE: alright... restrictions...

SM1: yeah, yeah... (laughs) the ultimate goal is the ultimate...sort of things so if the company wants x amount

TE: yeah

SM1: then... you have to do as much as you can in order to get there...

TE: yeah

SM1: you have to do as much as you can in store

TE: so they say, we want to increase sales by 10%, that's the ultimate goal... and then if you have to do promotions in store, or if you had to hold back promotions...even if it's... implementing then that's... will help you... in getting there...

SM1: mmm... I mean it's all trial and error isn't it now?

TE: yeah...

SM1: if you haven't... in a store that you haven't been to or you haven't been before,

TE: mmm

SM1: you only go back from your experience and how things'd worked and... mmm... and then just try it, and then if it doesn't work, then you have to, may have to change your... your mind-set and your behaviour

TE: mmm

SM1: in order to actually... let me... let me... look out of the box for a second and say... let's try this and let's try that instead... to see if you can get there...

TE: mmm and how...how much there is a difference between aaa because you've been an assistant store manager and a store manager... how much of a difference there is in that role... ah... when you play that role

SM1: to be honest, I can't remember much (laughs) of when I was back then...

TE: it's been few years

SM1: aaaa... and [store manager at location 1] there, he used to... push me a lot anyway

TE: mmm

SM1: like... mmm... which is partially probably why where I am... because he'd let me just get on with, he'd let me get on with things and do things, and all I have to do is to tell him...and he'd be like, yeah go ahead and try it and... stuff like that, so...mmm... and then when I went into [location 2], it was different because I didn't have that... backup,

almost... so it was almost, like I had to... do it on my own, and it was my decision making... so there was no... it was...I mean...there is sometimes here initially I might concern things I don't know if it's a good idea... but then you kind of, have to learn...you have to, make decisions on the spot, whether good or bad and then, that's where you learn from...so...yeah

TE: so it's your own personal experience input in that process

SM1: mm mm, I mean the difference is that, you had...ultimate... the accountability wasn't... yours...

TE: mmm

SM1: aaa... and then when you're going to [location 2] then, it is

TE: yeah

SM1: but it kind of stuck with you, probably... were it did use to a little bit in [location 1] but you always knew you have, you know, your manager to say, oh well he said I can do it this way

TE: you were trying

SM1: yeah... were when you become a store manager it's, your decision... but then, even now...

TE: mmm

SM1: I'm still the kind of person that will... sit back and think about, things... before making a decision and...I would rather get people's input... as oppose to saying it's my way or the highway sort of things...

TE: yeah... a little chat? and that would be, be it a store manager, be it another store manager, be it a regional manager, be it...

SM1: mmm [positively]

TE: how about your associates about your... do you think they are aware of the strategy, where going, that ultimate goal everybody's heading to or is it your job to, break it down or...

SM1: it is, I mean I guess it is my job to break it down, I think...aaa...I don't want, to, insult, intelligence of, of the, team... I don't ... I... think everyone here, or in this team at least... knows, what they should be doing... they look at the KPI's, I don't need to tell them, they know what their own sales are, they know what they're doing... mmm... [ASM1]'s responsibilities to make, you know, keep on top of this sort of, the KPI's that are falling and stuff like that, mmm... but, I think everyone... at, this moment in time where, we're not making plan... I don't want to make, making plan a big issue, because... it, can work, the other way around as well

TE: aha...

SM1: I'd rather push each and every sales that they can, in order to try and achieve plan, but if not... it's, not, the end... of, the game, sort of thing, it's like... I'd rather them to be happy so they can push themselves in that respect as oppose to, get depressed, and fall back, because... and take it personally

TE: for not making plan...

SM1: mmm... (nodding positively)

TE: ahhh, we... you did speak a lot about, in the two meetings I've attended, it was about the mystery shopper, wasn't it?

SM1: mmm were they? (laughs)

TE: how, how do you think that links to the whole... process

SM1: what it, what it is, I mean, I, again, it's not, it's not, I can do a long plan, and how are we're gonna get there, all that whole half an hour, but... a lot to do with the company's customer service, and that's my pride...

TE: mmm

SM1: I like... I mean, I want, I don't want somebody walking out thinking... we're not good or we're not...I'd rather somebody leaves happy... and not make plan rather than...five people been to store... angry at us, and hate us... because it's at the end of the day, it's long term what you have to think

about, not just...that day, or that short term, specific sort of... scenario... it's how, people on the outside, perceive us... ummm... and people talk people more likely to talk if they're unhappy, than they are if they are happy

TE: yeah

SM1: so... and that's, ultimately what... I believe in as, in working in this company, customer service has to come, top I mean that's what separate us, from the competitors as well...

TE: okay...

SM1: that's why mystery shopper is such a big deal to me...

TE: ummm

SM1: because if I see that...people can't do this or people can't do that... it's like, why can't they do it... we have to, be able to do it and... therefore...if we can do it then that means...we're doing everything that we can... that the company wants us to do...in order to make plan, so if we're not making plan... and we're not doing well in the mystery shopper then...it raises eye browses as well

TE: right...

SM1: so if you're doing well in the mystery shopper... you're not doing plan... then they like, okay...

TE: you're ticking the boxes...

SM1: you're ticking the boxes, they're doing,...they making the most of every opportunity that comes walk through the door... that's why it's important

TE: ummm

SM1: it's not if... because, it's, although it's just us in the store... we know what's going on...but people, above you... don't...ummm... in the store...so it's kind of...that's why I think it's quite important... on, on that sort of, two fold...

TE: you've mentioned people above you, and I'm always... strategy always been thought of, and even you told me that, it's, it's... they

make it, and we implement it... they do it and they will even provide it... and do you think... do you think that is because of the absence... they are not on the shop floor everyday...they don't see everybody coming in and out... on contrary to you obviously... or is it because they're job is to do other things, which is, for example... setting higher targets and bigger issues...

SM1: I mean... aaa... every company's goal is to grow... and you have to respect that... you have to take, to respect that they want to grow from what they did last year... and the year before... mmm...and...they have to think of different ways in order to grow... they can't just be... stagnant or... just think the same way... they expect to grow... you have to allow the company to evolve with the climate as well... so in that respect, I... I don't blame them...mmm...for what they have to do...mmm... and... in another way it makes our jobs interesting because we are not doing the same thing every day...

TE: ummm

SM1: we don't have to... ummm... you know... there is new thing being implemented, yeah... we have to implement them... but... at the, end of the day, it either do that or...or perceive the company of them not doing anything, to help us... you know... you can see from their point of view that they are trying to...

TE: hmmm

SM1: and then, the things that you have to do, then you have to do it... I guess it's different if it's your own business... if you're working...for somebody you have to... you know... you can't really... I guess... I mean you can give them feedback how it's doing... you know... if it's too much for the guys, or if it's too much for... us... to slow down, then you know... they have to take this feedback on board...it's like... it's like if... I give... an associate task...

TE: umm

SM1: and they say look, it's too much for me, then I have to, obviously, question why is it too much, is it too much... and then...you know... divert some of what they have to do to somebody else

TE: ummm...the same process more or less... happens...at...higher level...

SM1: yeah... but because... communication...backwards... isn't as...mmm...like from the store level to the support office isn't as...good I would say as the other way around then yeah... it could be a little bit slow for them to... to react on... I mean... *[regional manager]* is there to... to tell... if you need, to, to tell them look it's too much for us, we can't do this right now...

TE: right...

SM1: can we get an extension, and stuff like that... even he will fight your corner as long as you justify why you can't do it... and he's kind of in the middle where...he's been in the store he sees what it's like...he knows what we can and we can't do and then he'll challenge you...cause that's his job... to challenge us...to challenge me... to challenge my team...

TE: yeah...we mentioned a lot of communications coming upwards and downwards... you've mentioned that *[regional manager]*... sometimes... will... I didn't get it... clearly actually I'm asking for clarification here...is it go through *[regional manager]* everything or is it...

SM1: no, not all the times

TE: when you need him... you will call him in...

SM1: I mean to be honest... I don't... I don't call him as much as maybe some other mangers...

TE: yeah...

SM1: might do...because I know... what is in my remit... and what I need to... what I can do and decide on my own...

TE: ummm

SM1: and I also know... what my boundaries are in... in respect to that... so... and then... I know when I need to ask him for authorisation or clarification for something... then that's when I speak to him... but ... I'm... more of those... more of the kind of guy that... would rather... do it on my own initiative as oppose to... get people telling me what to... do sort of thing

TE: what to do...

SM1: yeah, sort of... mummy cuddle me I'm not ...doing quite well... I'm claustrophobic and all that (laughs)

TE: ahhh... these boundaries, relation boundaries between... well... what you wanna do and what you don't wanna to do is it set by the companies or is it something you develop over time, is it by...

SM1: it depends... yeah... I mean... initially it's how your relationship with your store manager when you're assistant manager...

TE: ummm

SM1: you know what decisions you can make on the floor... an then you obviously...you know what to... you need to know what decisions you can't make... and which need to go through the store manager before actually start implementing it... so it's like wise when you become a store manager...yeah your remit is larger, you can make decisions within the store and how we can implement things...

TE: yeah...

SM1: but instead of me sort of... for example...ummm... you know... somebody... an associate comes to me and ask me... I want a salary increase...

TE: yeah...

SM1: obviously... I wouldn't... if I... if I... felt like... I know that the decision is gonna be no... then I would... I would say...you know... because of a b and c this won't happen, but then if I feel like that this associate deserves it... and because they

giving me a good reason for why they deserve it...

TE: hmmm

SM1: then that's when I have to speak to [*regional manager*] about it... so it's not something... I won't go up to him and say, oh this person wants a pay rise...when I already know the answer is gonna be no... so... you know... where I think it should be a yes... the obviously I would fight that corner

TE: yeah...

SM1:does that make sense?

TE: yeah... it fits very nicely with what...what [*regional manager*] does for you doesn't it? Because he will fight your corner when...

SM1: yeah...

TE: when he knows you're right and you justify the reasons...

SM1: exactly...

TE: you're giving him...

SM1: yeah...

TE: and this is...how it is... have you worked with... in a different region at all?

SM1: well, we had... [*location 2*] was in...in its own central London region, wasn't it?

TE: ummm... ummm (positively)

SM1: so that was a... different... region all together...as well...

TE: yeah...

SM1: again...he left me to it as well... because [*location 2*] was the only one who's making plan in his region...

TE: yes...

SM1: emm... and...my...[*previous regional manager*]... you know... he... he actually probably... gave, us, more, sort of, or me, more... sort of...leave him to it kind of thing...let him make decision... than, maybe [*current regional manager*] would... but very subtly different...

TE: yeah...

SM1: it's not... too much...umm...but errr... then that because of the circumstances and I know...that if... if [location 2] for example wasn't perfuming well...

TE: yeah...

SM1: then I'll be hearing a lot more from him...

TE: right, okay...

SM1: so...

TE: so it... you think your boundaries and where you can move...and ...and how much decisions you can make... it has a personal element to it between you the regional manager, the relation... that personal relationship or is it because you were doing well... and he wanted you to deal... because you were doing well... then you know what you're doing...

SM1: he had to concentrate on the stores...

TE: on the other...

SM1: on the other stores that...didn't do so well... he told me that blatantly...

TE: right...

SM1: he came up to me and said look I know I'm sorry I haven't spent time with you... ummm... but... you know... you... you done... like in my review...you were saying that, you're doing well, there is no point me... coming here, telling you what your doi, what to do, when I got four or five other store, that need to be... you know... han... need to be told... need to be directed... more

TE: yeah...

SM1: ...so... I mean last year [location 2] was like...emmm...ten, twelve percent growth... so...you know...from that perspective... very little that he could've done in order to... to make it more, do you see what I mean?

TE: yes, yes... absolutely...

SM1: I mean, I... I didn't think any differently anyway...because... emm... if I needed help, I would go, i'm that kind of person that only

when I need help, is when I will go... to someone

TE:

SM1: it's not a pride thing... it's just... I know [exact]... but I know what i can do... i know my limitation, sort of thing...so...

TE: how important it is to know where to go... for help... where to go...rather than

SM1: it's very important...

TE: when to go...

SM1: very important...

TE: is it...

SM1: because if you don't do to the right department... something silly like...as if, you don't know your... the person in the accounts, for example...

TE: ummm...

SM1: like our PDQ machine broke down the other day...

TE: yeah...

SM1: and there's no one communication on, who deals, with UK stores...

TE: right...

SM1: so you're phoning different cash-up personnel...

TE: aha...

SM1: and next thing... oh you need to speak to this person, you need to speak to that person... and you're like... what... and then the other day... I was speaking to... we only found out that the merchandiser that was dealing, that used to deal with us... doesn't work at the support office anymore... (TE laughs)... so you're like... okay... then... that's important as well because... you want the merchandiser oversees, the one looks after your product, and if you're not getting good replenishment, then you have to kind of... find nowhere to question... and if you know the person that you... you know... that you, you knew you deal with... and you won't told that this person left, so... you know...

TE: a bit of surprise...

SM1: yeah exactly (laughs)

TE: is that knowing based on personal ... you've seen the other person where you've been...

SM1: yeah... well...

TE: or at the support office or...

SM1: yeah... he came down to visit actually, not here... when I was at [location 2]... he came to visit us and tried to apply different ways, and stuff like that... he knew... there were face to the name and stuff...

TE: yeah...

SM1: and then, HR issues... you know who your HR contact is...

TE: ummm...

SM1: and because of this whole NHS PCT visit...

TE: yes...

SM1: was very... like... a big dialogue going on between us... and...and... and her

TE: ummm...

SM1: and... again it's important to know, and build a rapport with the support office as well... because it helps you... get the best out of them... to help you... in the store...

TE: yeah... ummm... that's very interesting... I don't know if you have any... any... thing to do with strategy in this context... do you think you would... you would... do you think you're changing your strategy in everyday's activities, i'll just put it bluntly... do you do it while you're doing discounts... while you're... i don't know... when you change the layout... are you changing the company's strategy or are you...

SM1: ummm...

TE: where do you see yourself in that process?

SM1: where I see myself in that process... well... I think I change... ummmm... eh... it... ummm...it's... it's difficult... you can't change

the strategy of the company... it's... so... going back to what I said before...

TE: yeah...

SM1: it's how you do it... is different...

TE: okay...

SM1: like I changed, the way, I would do things... like in [location 2]... I hardly ever wanted to give discount out, you know you don't have to because people there have got the money...mmm... you know... your average order 270 to 290 and you're coming here... and the average order is 180 190 and everyone wants discount, it's different... it's different...

TE: yeah...

SM1: but you also have to think at different level... where... mmm... in [location 2] you have to protect your profit more... because... mmm... overheads were more... ummm... in relation to how much money the store is taking...

TE: yeah...

SM1: this store is slightly different...

TE: aha...

SM1: where... overheads aren't as much as...ummm... at... or... you know... there is overheads is... is similar maybe to [location 2] but the sales are more... even though we're not making plan so you know... from a cost implication if you are giving twenty pounds or thirty pounds away... it's not gonna making that much difference on your bottom line... ummm ... you know... so... it's the change in behaviour... I think... maybe more than strategy...

TE: yeah...

SM1: that you have to... and that's... that's how... I have to implement things... you know... I will... I might have come here...as... almost like a snood... like yeah I want this done... I know this is gonna work... but it doesn't... because... you've got a very mixed area...

TE: ummm...

SM1: you know... ummm... and you have to cater for every one of those... like mmm... like last year I would've... I wouldn't... I wouldn't have wanted to do two for one, but I know that... this store needs it... it needs that volume to come through...

TE: ummm...

SM1: you know... you haven't got the big spenders... you have to rely on the amount... the amount of people that walk in through the door...

TE: ummm...

SM1: and you have to try and convert every one of them... in order to... to protect your bottom line... that... so it's like I said... it's not the company's strategy that's changing...

TE: mmm...

SM1: ummm... you're just ummm... changing the way maybe you do things... to what worked for you in the past... like when I used to work in [location 1]... it used to be very booming time...

TE: yeah...

SM1: people didn't mind spending more money... ummm... in [location 1] there is that... more class defined there... where we're in the shopping centre... people come into the shopping centre... do actually... want to spend more money than the people maybe in the high street... I guess it might be similar, here where we're in the high street and not in a shopping centre... so it's kind of... we... we've got the other side of that class-defined, kind of thing... so... if that make sense...

TE: yes... yeah...

SM1: so when... when I look at it like that... it's kind of... you have to analyse things... the store... on a local level... before you can say... what we'll do for the company... what... how we're gonna implement strategy of the company ...

TE: again, we've mentioned during the meeting, I remember you said that we've got a lot of tools now... and, these, tools, can be,

used to do... X and Y and Z... ummm... do you think these tools are standard between the stores, or do they need to be used in different ways or...

SM1: some stores may have to rely on it more than the others...

TE: ummm...

SM1: I think we might have to rely on the two for one offer more than... ummm... another store... like canary wharf for example...

TE: for example...

SM1: yeah... ummm... interest free credit... again... it's an option... ummm... for patients... something that... no other optician has... somebody wants to buy quality... can now afford it... cause they can break it up over six or twelve months period... nectar card again I think is a big thing... loyalt... you know... it's gonna bring loyalty to the store and also... cause... some people are really... into their loyalty cards, right?

TE: yeah... yeah...

SM1: and people really want to get these points... so they can get money off their shopping or cinemas, and things like that...

TE: yeah... yeah...

SM1: I'm a Tesco club card kind of guy, not joking...

TE: not Costa... (laughs)

SM1: but I still got a nectar card (laughing) ... so... but... I know it's like... like when I do my online shopping... where I buy things, will be dictated... mostly... from where I can get the points from because I... I'm a big airmiles collector... so... if I can buy something... through... as it is on or maybe one or two pounds more...

TE: ummm...

SM1: but I know I'm getting five or six or even ten airmiles from... you know... that's a small amount of money to pay to get that extra amount of airmiles... it's similar to people... maybe wanting to come... because the nectar card... they can come here and get X

amount of points... and then later they build... they're building it up to get some virgin holidays or something like that...so... I think... from that perspective we never had as much... capture... like... as much of... an incentive to come to the store and... and... less of an incentive not to... to buy

TE: yes...

SM1: if that makes sense...

TE: yes... it does... I... well... I mean... I haven't got anything else to ask... (SM1 start laughing) it was very interesting...

SM1: okay...

TE: thank you so much again ...

SM1: well I know... I mean I'm sorry it doesn't answer... I know you're trying to get... ahhh... how do I... do strategy myself... but it's like I said... it's dictated by the company... so... strategy almost is... I guess dictated is quite a harsh word... but it's more like... you... you don't have... the scope to change... the company's strategy...

TE: yes...

SM1: I think collectively, if all the store managers felt the same way...

TE: yes...

SM1: and wanting something changed that's different...

TE: yes...

SM1: but... you know... if the company wanting something done... then you have to try and do as much as you can... so you make sure...

TE: but that's interesting, how do you think... do they get the feedback... because you said if we wanted collectively to do that... do you communicate with the others?... do you wait...

SM1: no you don't...

TE: till you meet them?

SM1: I only say that because it's almost like... you know... if a large workforce did come together and say, we don't like this...

TE: yeah...

SM1: then the company will have to listen... but there isn't... I guess there isn't a... but... the thing is...I... there is nothing that I don't believe in...

TE: yeah...

SM1: so... I have to... kind of... may clarify that position as well...

TE: right...

SM1: what I don't like... is how the speed and...ummm... the speed at which they want us to do it, but at the same time I respect it because they need... it's changing times and you have to... they have to... to try to do as much as they can to make sure that they protect... growth...

TE: you do meet your other... regional managers...and

SM1: store managers yeah... on a monthly ...

TE: store managers in your region... every month...

SM1: yeah...

TE: and you meet the whole company's managers every year, don't you?

SM1: yeah... we do... yeah...

TE: so do you communicate on that le...

SM1: yeah yeah... on store managers level, like on our regional level... we do communicate what you don't and do like...

TE: yeah...

SM1: again it can be very specific to the stores in the region...

TE: ummm...

SM1: so sometimes you might say... oh... you know... oh I'll live with it, I'm fine with that... it's fine... sometimes like yeah... I

strongly believe... but it's not... and [*regional manager*] will take that feedback,

TE: ummm...

SM1: back to Aaron, and will say listen this A,B and C... that this this this and this... you know... when this is gonna change... but what might an issue for one store might not be an issue for another...

TE: right, okay...

SM1: so... it's not... there is never been a time when we all said, actually... this is, we don't like this... because of this, this and this... you know... I think the big... the biggest ho-ha... I've ever witnessed... was when OLR came in...

TE: ummm...

SM1: ummm... I mean... with the [*certain professional members*] around the table, that said... why you're getting a piece of... software to dictate what... what should be dispensed...

TE: yeah

SM1: you know... what a dispensers gone through... and I was one of them that... that didn't like it (laughing)

TE: yeah...

SM1: and I said an excuse after excuse after excuse... like why would you sell a 1.74 lens for a -2 prescription, that doesn't make sense...

TE: yeah...

SM1: and then you're getting these questions back like... why wouldn't you... and it's like... well that's not an answer... to my question...

TE: yeah... (laughing)

SM1: so... you're overselling a product... yeah... if you want a 1.6 for any prescription, fine... I can understand that...

TE: yeah...

SM1: it will be flatter, ect ect ect... but... you don't sell a 1.7 with a minus...

TE: yeah?

SM1: yeah...

[TL1 is knocking on the store's door to be let in. When TL1 is in, SM1 asks about a professional member of staff]

SM1: yes I mean that... and then we were told... you know... the company wants to do this, you have to do this... and then... quite quickly actually... I was like actually... this is actually... really good... because you can see... from a customer perspective... cause you can already see from your own perspective and...

TE: ummm...

SM1: how, you feel... but when you see... when the customer reacts to it... it's all on the screen, prices are there, it does that... it actually looks... and looks more professional, than you're saying... you know... I can actually go for this and this... while on OLR computer tick a box and everything so... I quickly kind of...

TE: that doesn't...

SM1: quickly warmed to it...

TE: that doesn't contradict with... you, localising stuff? because they will see that everywhere they go...

SM1: yeah...

TE: we've got the store standards now?

SM1: yeah... yeah... but...

TE: so you need to see consistency in everywhere...

SM1: yeah... I think the way you apply what you do...

TE: ummm...

SM1: ... you've got the tools... the way you apply it... has to be specific to the place where you work, depending on who your customers are... and even then... you can get a suited and booted customer comes through the door...

TE: ummm...

SM1: and you can get... yeah... you know... a single mother of three... comes through the door

TE: ummm...

SM1: and you have to change, the way, you do things... because one is gonna want that, and one may not want that... so then, it's not for you to assume or to judge that... you still have to give the whole, options... from it...

TE: ummm...

SM1: but saying that... at the same time... you're gonna... you kind of... I'm kind of putting myself in the hole here... am I?

TE: no (laughs)...

SM1: so... so... you know what I mean... you...

TE: yeah...

SM1: you have to... if you've got more... more NHS-based patients then you have to... and you've got more older clientele that buy, [product] and stuff like that... you have to... change the way you do it...

TE: I mean... for me... hearing that... it seems like two levels of customisation, one is to each and every one within the store, and one to... different stores and different places... does that... does that sound...

SM1: yeah...

TE: what you're...

SM1: yeah... I think so...

TE: yeah...

SM1: but it's also like... you get an associate like... [AP1] for example...

TE: ummm...

SM1: and he is very... speeched... he's very, scripted...

TE: yeah...

SM1: and, you know... he... although he can sometimes make a judgment... he still say the same speech... because that's the way... he does things...

TE: ummm...

SM1: and he surprises himself sometimes so, that's kind of... you know... testament to the OLR...

TE: yeah...

SM1: where it's designed to make sure that you give the options to everyone... and he was doing it in... his static... method of selling... things like scripted...

TE: that is also interesting... (SM1 laughs) like you said

SM1: yeah...

TE: just one last thing, you did mentioned that... i'll go back to the collective part and when store managers communicate with each other's...

SM1: yeah...

TE: and... you did mention, the... monthly, store managers meeting... we mentioned the yearly meeting...

SM1: yeah...

TE: ahhh, two things... ummm... I'm really... interested in, what is the difference between the two... if there is any difference ...you know... communication wise... do they communicate the same thing? Do they communicate something different? Or is it...

SM1: ummm... yeah the regional... mmm... the regional... meetings... are... different... because... mainly... you meet them every month... it's a monthly, sort of on going things...

TE: aha...

SM1: in the yearly conference... you still in your regions...

TE: umm...

SM1: you do meet different people yeah... but it's not like you... you have meetings with different region...

TE: okay... so you still sort of clusters of the regions...

SM1: yeah... yeah... you still... all your work group and stuff... still within your region...

TE: yeah... and is that dictated by just the region...or is it... I mean... if you know for example... you worked now in central London... yeah... and you split into different groups because... you know... of somebody... would you go and sit on a different table... or is it already pre-set?

SM1: it's kind of... it's something...

TE: umm

SM1: when you're going in to the conference and doing... go through presentation... you sit with... with your own region...

TE: region

SM1: that's probably who you know...

TE: yeah...

SM1: when you're... sort of... mingling... like when you're at lunch or something like that... breakfast... then yeah... you go and... you might sit with different people and stuff

TE: and do you meet the store managers... within your region... or outside the region... outside these meetings... or is it... depends... or...

SM1: no, hardly ever...

TE: hardly ever...

SM1: sometimes... like... I get on well with *[another store manager 2]* and...

TE: yeah...

SM1: *[store manager at location 1]* and stuff...so yeah sometimes you will... but I haven't done that for quite sometimes... (laughing)

TE: fair enough... ah... thank you very much again...

SM1: is that alright?

TE: yeah...

SM1: obviously this doesn't go back to the company...

[Recording ends]