DEVELOPMENT OF EXPERTISE THROUGH CO-CREATION IN NETWORKS

An ethnographic case study from a professional service context

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Dedicated to my loving husband, Janne Mattila

ABSTRACT

Professional service firms are recognized as a still growing sector in modern economies. In professional services, expertise and knowledge are the key resources, and constant development and renewal of the resource base is essential to remain innovative and successful. Vast research and literature on professional services provide insights into how professional service providers use their expertise in collaboration. However, business development occurs in co-creation networks, where professional service providers collaborate with customers and other stakeholders. In these types of co-creation processes, the solution is sought together, utilizing the expertise and knowledge of all participants; this search is also about embracing uncertainty and working without setting an exact goal.

Therefore, focusing explicitly on outlining expertise and what constitutes business-to-business services based on co-creation is needed. Since professional services rely heavily on expertise and are crucial in facilitating knowledge creation in their customers, a more detailed understanding of expertise is needed to successfully collaborate with customers in value co-creation networks. I also argue that the expertise needed when operating in co-creation networks differs from that needed in more traditional development and collaboration processes between professional service provider customers. More precisely, I believe different aspects and expertise areas gain a more prominent role when collaboration occurs in co-creation networks.

My study aims to build an empirically grounded framework of expertise and its development in professional services in today's ever-more networked business world. To reach the research objective, I have conducted an ethnographic case study of three individual studies and the synthesis part. Adopting ethnography as a research approach allows for building a contextual and detailed understanding of expertise in professional services. The individual studies focus on developing an executive learning community focusing on collective creation, facilitation activities and their role in supporting co-creation, and strategy co-creation between independent consultants in a micro firm context.

The synthesis part of this study integrates the literature and empirical findings of the original studies and introduces the empirical framework and discusses what the expertise consists of in professional services, especially in management consulting, coaching, and business development. The key concepts of service-dominant logic and its view on co-creation – service, value, actors, and resources – are used to

highlight the areas of expertise that gain importance when professionals engage in co-creation with customers and other stakeholders. Expertise areas in professional services based on the results of my study are 1) knowledge-based expertise, 2) practice-based expertise, 3) emotional and situational expertise, and 4) a co-creation mindset. The fourth category – a co-creation mindset – can be seen as an area of expertise that guides the collaboration and work of the professionals at the heart of expertise forming the so-called red thread. In the ever more networked, interactional, and joint way of conducting business, developing new solutions, and enabling learning, expertise permitting co-creation is highlighted. It can be argued that the network's multi-layered nature is a platform for expertise development. Also, varied contexts provide access to myriad resources or arenas for developing practice-based expertise via reflection, which then develops into a part of knowledge-based expertise. In practice, expertise develops through reflection, action, and dialogue.

This study contributes to the professional service literature by providing a nuanced and fine-grained analysis and the categorization of expertise by combining existing literature and the findings of the empirical study. This study increases understanding of the practice of expertise development and discusses the nature of expertise. Expertise results from resource development and experience developed through consciously addressing challenging problems and having the courage to step beyond one's comfort zone. Expertise is also developed and appreciated in interaction; thus, this study highlights the social aspects of expertise.

TIIVISTELMÄ

Asiantuntijapalvelut muodostavat yhä kasvavan sektorin ja toimialan. Asiantuntijuutta ja asiantuntijatietoa avainresursseina tulee kehittää jatkuvasti innovatiivisuuden ja menestyksen varmistamiseksi. Kirjallisuudesta ja tutkimuksesta löytyy tietoa ja esimerkkejä siitä, miten asiantuntijapalvelujen tarjoajat hyödyntävät asiantuntemustaan ja osaamistaan yhteistyöprosesseissa asiakkaiden kanssa. Aikaisempi tutkimus on nostanut esiin konteksteja ja prosesseja, joissa asiantuntijuutta voidaan kehittää ja tapoja sekä menetelmiä asiantuntijuuden kehittämiseen. Kuitenkin tänä päivänä yhteistyö ja liiketoiminnan kehittäminen enenevissä määrin tapahtuu yhteiskehittämisen verkostoissa ja usein mukana kehitystyössä on palvelujen tarjoajan ja asiakkaiden lisäksi myös muita sidosryhmiä. Tällaisissa prosesseissa ratkaisuja etsitään ja kehitetään nimenomaan hyödyntäen kaikkien osallistuvien toimijoiden asiantuntemusta ja tietämystä.

Sen vuoksi on tärkeää tutkia ja rakentaa ymmärrystä asiantuntemuksesta erityisesti sellaisissa liiketoiminnan business-to-business asiantuntijapalveluissa, jotka pohjaavat yhteiskehittämiseen ja joissa asiantuntijoilla on merkittävä rooli asiakkaiden tiedon luonnin tukijoina ja fasilitoijina. Ymmärrys asiantuntijuudesta ja sen kehittämisestä on erityisen tärkeää, jotta yhteistyössä ja kehittämistyössä arvon yhteisluonnin verkostoissa voidaan menestyä. Tämän lisäksi väitöskirjassani nostan esiin näkemyksen, että asiantuntijuus yhteiskehittämisen verkostoissa näyttäytyy erilaisena kuin perinteisemmässä kontekstissa, jossa yhteistyö on asiakkaan ja palveluntarjoajan välistä.

Tutkimuksen tavoitteena on rakentaa käytäntöön pohjaava viitekehys asiantuntijuudesta ja sen kehittämisestä asiantuntijapalveluissa, kontekstina tämän päivän yhä verkostoituneempi liiketoimintaympäristö. Tutkimus on toteutettu etnografisena tapaustutkimuksena, joka koostuu kolmesta osatutkimuksesta ja synteesiosasta. Etnografinen tutkimusote mahdollistaa kontekstuaalisen ja yksityiskohtaisen ymmärryksen rakentamisen asiantuntijuudesta. Osatutkimuksissani tarkastelen: oppimisyhteisön rakentumista liikkeenjohdon koulutuksen kontekstissa hyödyntäen improvisaatioteatterin keinoja ja lähestymistapaa, fasilitaation roolia yhteiskehittämisen tukemisessa ja mahdollistamisessa sekä strategian yhteiskehittämistä pienissä asiantuntijapalveluyrityksissä asiantuntijoiden välisenä yhteistyönä.

Tutkimuksen synteesiosassa tuon yhteen kirjallisuuden ja osatutkimusten tulokseen viitekehykseen, joka kuvaa asiantuntemusta, mistä se koostuu, erityisesti

johdon konsultoinnin, valmennuksen ja liiketoiminnan kehittämisen palvelujen kontekstissa. Viitekehyksen rakentamisessa ja asiantuntijuuden osa-alueiden tunnistamisessa ja määrittämisessä olen käyttänyt palvelulähtöisen logiikan (Service-dominant logic) keskeisiä käsitteitä: palvelu, arvo, toimijat ja resurssit. Niiden avulla on mahdollista nostaa esiin asiantuntijuusalueita, jotka ovat merkittäviä yhteistyössä asiantuntijoiden ja muiden sidosryhmien kanssa.

Tutkimuksen tulosten mukaan asiantuntijuus koostuu: 1) tietopohjaisesta asiantuntijuudesta, 2) käytäntöpohjaisesta asiantuntijuudesta, 3) tunne- ja tilanne asiantuntijuudesta ja 4) yhteiskehittämisen ajattelutavasta. Neljäs kategoria, yhteiskehittämisen ajattelutapa (mindset) voidaan nähdä osaamisalueena, joka ohjaa yhteistyötä ja asiantuntijoiden toimintaa, on sen keskiössä muodostaa toiminnan lävitse kulkevan punaisen langan. Vuorovaikutukseen ja yhteistyöhön pohjaavassa tavassa toteuttaa liiketoimintaa, kehittää ratkaisuja ja mahdollistaa oppimista, se on yhteiskehittämistä mahdollistavaa asiantuntijuutta. Verkostojen monitasoisuus ja muutos tarjoaa alustan osaamisen kehittämiselle. Erilaiset kontekstit mahdollistavat pääsyn kiinni lukemattomiin resursseihin ja areenoihin, joilla kehittää käytäntöpohjaista asiantuntijuutta. Reflektoinnin kautta siitä tulee osa tietopohjaista asiantuntijuutta. Käytännössä asiantuntijuuden voidaan nähdä kehittyvän reflektion, toiminnan ja dialogin prosessin kautta.

Tämä tutkimus tuo uutta näkemystä asiantuntijapalvelujen kirjallisuuteen tarjoamalla vivahteikkaan ja hienojakoisen jaottelun asiantuntijuudesta. Tutkimus myös lisää ymmärrystä asiantuntijuuden kehittymisestä käytännössä ja asiantuntijuuden luonteesta. Asiantuntijuus on tulosta tavasta katsoa ja yhdistää sekä luoda resursseja uudella ja erilaisella tavalla, se kehittyy itseään koko ajan haastamalla ja kokemuksen kautta sekä mukavuusalueen ulkopuolella. Asiantuntijuus kehittyy ja sitä arvostetaan vuorovaikutuksessa, ja sen vuoksi tämän tutkimuksen kautta haluan myös nostaa eriin asiantuntijuuden sosiaalisia ja kontekstuaalisia puolia sekä luonnetta.

Tutkimus tuottaa myös ajankohtaista ja käytännöllistä tietoa asiantuntijapalveluja tarjoaville ja niitä kehittäville tahoille sekä koulutusorganisaatioille. Merkitys korostuu erityisesti sellaisten palvelujen kehittämisessä, joissa asiantuntijoilla on merkittävä rooli asiakkaiden tiedon luonnin tukijoina ja fasilitoijina. On tärkeää miettiä, miten tukea oppivan yhteisön syntymistä ja minkälaiset rakenteet ja materiaalit tukevat yhteistä tekemistä sekä miten saadaan toimijat sitoutumaan yhteistyöhön ja tuetaan luottamuksen rakentumista. Tutkimus nostaa esiin myös käytäntöjä ja aktiviteetteja, joiden kautta asiantuntijat yhdessä muiden toimijoiden kanssa luovat tavoitteet ja tilan yhteistyölle ja mahdollistavat oppimista sekä uuden tiedon luomista erilaisin työkaluin. Yhteiskehittäminen arvon yhteisluonnissa sisältää myös ajatuksen epävarmuuden sietämisestä ja yhdessä tekemisestä luottaen prosessiin sen sijaan, että lähtökohtana olisi hyvin tarkkaan määritelty tavoite.

ASIASANAT: asiantuntijapalvelut, asiantuntijuuden kehittyminen, tieto, arvon yhteisluonti, etnografia, sosiaalinen konstruktionismi

Acknowledgments

Rivers know this: there is no hurry. We shall get there some day.
Joet tietävät tämän: ei ole kiirettä. Pääsemme perille jonakin päivänä.

A.A. Milne, Winnie-the-Pooh

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List of Original Publications

This dissertation is based on the following original publications:

I   Tanja Lepistö, Ulla Hytti (2021). Developing an executive learning community: Focus on collective creation. Academy of Management Learning & Education, 2021; Vol. 20, No. 4: 514–538.

II   Tanja Lepistö, Arja Lemmetyinen (2023). Facilitation activities and their role in supporting co-creation in a professional service context. Earlier version presented at a Nordic workshop on inter-organizational research, Sweden (4/2019).

III   Tanja Lepistö, Satu Aaltonen, Ulla Hytti (2018). Co-creating strategy between independent consultants in a micro firm context. Chapter 8, In. Hytti U., Blackburn, R. and Tegtmeier, S. (Eds.) The Dynamics of Entrepreneurial Contexts. Frontiers in European Entrepreneurship Research. Edward Elgar Publishing, in association with The ECSB, 2018: 142–165.

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1   Introduction

1.1   Motivation to study expertise development with a focus on professional services

The motivation for my research stems from my experiences working on R&D projects focusing on co-creation and new service development. During these projects, I observed and collaborated with the professionals in their work. Since I began considering my Ph.D. research, I have known I wanted to study co-creation. At the heart of my thinking was interaction, which is central to the co-creation process. However, from which angle would be the focus to study interaction? Observing professional service providers (PSPs) in a collaboration that builds on the ideas of co-creation made me think of expertise. I became interested in learning what kind of expertise these professionals engaging in co-creation need and how engaging in co-creation in networks could affect expertise development.

While observing an intervention for executive coaching, a business coach showed a video to participants in which Simon Sinek talked about the concept of the golden circle. His work and ideas about the golden circle are based on the idea that one should start by proposing and outlining how what one does differs from what others do and then make concrete decisions about products and services (e.g., defining the purpose, motivation, cause, and beliefs concerning one's business or interests). After determining the purpose, one can plan value to inspire, thus inspiring others and helping build trust (Sinek, 2019). Defining the purpose (i.e., value proposition) for oneself and customers in reciprocal dialogue and interaction is what I have observed while collaborating with professionals in the research project I worked for. I am interested in learning what kind of expertise the professionals use, first by defining the value proposition and second, by continuing the collaboration to actually co-create value.

In professional services (PS), expertise and knowledge comprise the key resources (e.g., Sarvary, 1999; Engvall & Kipping, 2002; Anand et al., 2007). Thus, remaining innovative and successful requires constantly developing and renewing the resource base (Anand et al., 2007). The need for resource development also stems from the fact that professional service firms (PSFs) help shape managerial thoughts and actions through their advice to customer firms because they operate in the

interface between their customer's tacit knowledge base and the economy's wider knowledge base. Diagnosing customer needs and service delivery involves a high degree of interaction with the customer, highlighting the need for an interactive problem-solving process (Windrum & Tomlinson, 1999). The questions about the knowledge base, knowledge management, and learning are at the heart of discussions concerning PS and professional service organizations, from managing explicit knowledge (Swart & Kinnie, 2003) to tacit knowledge and communities of practice (Faulconbridge, 2006 and 2010).

There are literature streams highlight the importance of strong academic knowledge and emphasize the formalized, rational character of professional knowledge created in academia or similar institutions. However, some researchers want to stress that focusing on academic knowledge tends to downplay the importance of other areas of knowledge and expertise of PSP. For instance, interpreting, persuading, storytelling, and narrative practices could be mentioned (Nikolova, 2019, 23), highlighting the role and importance of everyday practice in creating professional knowledge. Building on the argument that professional knowledge-in-use is always blended with pragmatically developed rules of thumb of expert practitioners (Brante, 1988; Reihlen, 2003; Reihlen & Apel, 2007) entails that "expertise is not mere knowledge but the practice of knowledge" (Freidson, 1970, 91). The practice of professionals is context-dependent, and the solutions to certain problems depend on general and specific knowledge and the customer's circumstances (Brante, 1988, 131). Therefore, studying expertise means looking at professionals expert-in-context (Garrett et al., 2008: Hoffman et al., 1997, p. 553), as the relationships with customers are embedded in a broader institutional context, such as long-term relationships between customers and service providers and alliances between consulting firms (O'Farrell & Wood, 1999, 134–135).

PS provide an interesting and relevant context to study expertise and its development since they are recognized as a still growing sector in modern economies (von Nordenflycht, 2006; Toivonen, 2007; Nikolova, 2019); one example is the increase of consultancy services for business management. During the past three decades, the PSF sector has emerged as one of the most significant, profitable, and rapidly growing sectors in the global economy (Empson, Muzio, Broschak, & Hinings, 2017). Since management consultants are adopting increasingly active roles with the companies, governments, and other institutions they assist, the organizational importance of consulting is increasing (Nikolova, 2019). Support from experts external to the focal organization is sought due to structural changes in the companies; this support is found valuable when re-evaluating business focus and differentiating from competitors. Focusing on core competencies also increases the demand for external advice in renewing activities and developing businesses and innovation (Hirvonen & Helander, 2001; Toivonen, 2007). The idea of knowledge

as the most significant resource in the modern economy places knowledge-intensive or professional firms at the forefront of this development (Nikolova, 2019).

Concerning knowledge and its development, PS can be seen to represent extreme cases since they employ highly educated people and are particularly dependent on their ability to attract, mobilize, develop, and transform the knowledge of these employees to create value for their customers (Løwendahl et al., 2001). Thus, PS have a crucial role in developing human capital, creating innovative business services, reshaping government institutions, establishing and interpreting the rules of financial markets, and setting legal, accounting, and other professional standards. Consequently, studying PS can offer insights into the contemporary challenges facing organizations within the knowledge economy and increase the understanding of more conventional organizations (Empson, 2015).

If we look at management consulting a bit more closely since it is the focus of this study, it can be considered a quite diverse industry because consultancies span from more generalist to scientific or expert consultancies. Consulting services are not only offered by consulting firms but by accounting, IT, logistics firms, and academics on a part-time basis (Aharoni, 1999, 153; Nikolova, 2019). Broadly defined, management consulting is "*a service offered by independent service providers that assist client organizations to develop and implement problem solutions to particular management problems*" (Nikolova, 2019, 24). This diversity can make choosing the service provider challenging for potential customers; thus, the capability to facilitate a customer's decision-making process through reciprocal value propositions is critical. Furthermore, the verb assist refer to something done collaboratively, but the customer has a central role in the process. The literature has emphasized that integrating customers into the consulting problem or challenge is the most important success factor (Werr & Styhre, 2003). However, research has rarely focused on explaining what close co-operation between consultants and customers implies, especially for the problem-solving process, although some important studies focus on problem-solving (Nikolova, 2019; Aarikka-Stenroos & Jaakkola, 2012). Thus, the need to improve co-operation between customers and service providers to provide real value to the customer is highlighted (Nikolova, 2019) to ensure value creation and avoid standardized solutions or quick fixes (Poulfelt et al., 2005; Nikolova, 2019). In addition, the importance of networks (Maclaran, Saren, Stern, & Tadajewski, 2011; Aarikka-Stenroos & Ritala, 2017) raises the need to study and better understand the social and dynamic nature of expertise. This research has decided not to adopt a finite definition of any certain type of network. My studies will introduce the types of networks this study focuses on. This study looks at networks via relationships. "*Relationships, by any definition, are not limited to dyads but are nested within networks of relationships and occur between networks of relationships. These networks are not static entities but are*

dynamic systems that work together to achieve mutual benefit (value) through service provision. To fully grasp value creation, this broader, relational context must be understood" (Vargo, 2009, 378).

1.2 The research gap and positioning of the study

This research aims to contribute to the literature on PS by focusing on expertise development and defining the areas of expertise the professionals utilize during co-creating with customers and other stakeholders. The discussion concerning the nature of knowledge, its development, and knowledge's role as a key resource is the starting point of creating the theoretical starting point of this study. However, to build an understanding of expertise in B2B services and in a network context means other literature streams need to be incorporated since expertise is a multidisciplinary concept. This study includes ideas of what expertise is and how it is defined, as well as literature streams focusing on resources and their contextual creation and development. These literature streams will be introduced next; from there, the key concepts of this study and discussing them will help me introduce the research gap.

1.2.1 Professional services and knowledge

Earlier in the introduction, I discussed knowledge's role as a key resource in professional services. Two broad streams of literature focus on expertise and knowledge development in professional service: strategic management of a PSF (e.g., Løwendahl, 1997; Broschak, 2017) and knowledge management, which concentrates on questions about the knowledge base and learning (Alvesson, 2001; Empson, 2001; Løwendahl et al., 2001; Gottschalk, 2014; Faulconbridge, 2015; Faulconbridge, 2017). Both approaches look at expertise mostly at the firm level, adopt a managerial approach, and view knowledge and expertise as highly valuable organizational resources (e.g., Bender & Fish, 2000; Empson, 2001).

Professionals allegedly develop their expertise when they work with their customers and engage in projects for value creation (Løwendahl et al., 2001; Fosstenløkken, Løwendahl, & Revang, 2003). Therefore, knowledge in a PSF is enriched and developed primarily through day-to-day operations (Itami, 1987). Since professionals learn from the clients they work for and with and through the projects they engage in, the projects help determine what they know and how much. Thus, a strategically targeted portfolio of clients and projects can be seen to facilitate developing and improving the knowledge base. Without such focus, the choice of projects, knowledge development, and recruiting may remain ad hoc (Løwendahl et al., 2001). This means that characteristics of knowledge and learning (knowledge development) are crucial when building an understanding of the form, management,

markets, and service a PSF produces (Faulconbridge, 2017). Thus knowledge can be seen "as the main input (the employment of knowledgeable individuals) and as the main output (advice that addresses the client's needs)" (Faulconbridge, 2017, 431).

Knowledge management is viewed in two ways: knowledge as an asset and knowing as a process (Empson, 2001). The knowledge as an asset perspective builds on the firm's resource-based view (RBV), looking at managing and developing knowledge as a source for competitive advantage (Penrose, 1959; Teece, 1981) and organizations as mechanisms for creating and utilizing knowledge (Barney, 1991; Conner & Prahalad, 1996; Grant, 1996). Those viewing knowledge from knowing as a process perceive that knowledge cannot be analyzed and understood as an objective reality (as in knowledge as an asset view). Instead, knowledge is considered a social construct that is developed, transmitted, and maintained in social situations (Berger & Luckmann, 1967; Blackler, 1995; Tsoukas, 1996). Building on this process view and focusing on value creation, Løwendahl et al. (2001) define knowledge as the combination of skills, routines, norms, and values (developed and shared by at least two employees working together), along with each employee's knowledge and the information available to them. Also, cultural systems – through which professionals achieve their knowledge – socialization processes, and other socially situated activities influence the knowledge base (Alvesson, 1993; Lave & Wenger, 1991; Blackler, 1995).

As mentioned, PS are characterized by customization and interaction, tailoring the offering and processes to the special needs of customers, so understanding how to effectively capture and use practice-based knowledge to develop new services for value co-creation is important (Dougherty, 2004; Ballantyne & Aitken, 2007; Kohtamäki & Rajala, 2016). Thus, research incorporating the aspects of two research streams (knowledge as an asset and knowing as a process) is still needed to further the understanding of expertise in today's networked way of collaborating with customers and stakeholders and looking at expertise as a key resource and how it is developed via the collaboration process, as expertise is also socially constructed. Through ethnography, a learning stance can be taken as seeking to learn something new with and from the people (Skukauskaitė & Green, 2023). That is why a longitudinal and qualitative approach that enables immersing into context and analyzing the contextual layers of the co-creation process is called for to develop a fine-grained analysis of what expertise consists of and how it can be developed to stay current in changes in business environments.

1.2.2 Focus on practices

The practice research stream has also approached co-creation in the professional service and knowledge-intensive business service context. Practices as "more or less

routinized actions, which are orchestrated by tools, know-how, images, physical space, and a subject, who is carrying out the practice" (Korkman, 2006, 27) are accepted ways of doing things that are embodied, materially mediated, and shared between actors and routinized over time (Reckwitz, 2002; Schatzki, Knorr-Certina, & von Savigny, 2001). What the practice approach seeks to do is explain how a phenomenon transpires without prioritizing the conceptual importance of individual actors (the idea that actors socially construct the world without societal influences) or societal structures (societal structures determine the micro-level action ultimately) (Reckwitz, 2002; Whittington, 2006). For example, Kowalkowski, Persson, Ridell, Röndell, and Sörhammar (2012) have studied the co-creative practice of forming a value proposition.

Research has identified practices characterizing client-consultant interaction (shaping impressions, problem-solving, and negotiating expectations), highlighting the critical role customers play in these practices (Nikolova, Reihlen, & Schlapfner, 2009). Furthermore, practices of community co-creation (e.g., engagement) (Jensen Schau, Muñiz, & Arnould, 2009; Kowalkowski et al., 2012, 1556) and social networking (Jensen Schau et al., 2009) have been in focus. In the context of the co-creation of value and co-production of value proposition, the complementarity of resources and commitment to common goals (Hakanen & Jaakkola, 2012), active commitment (Chen, Tsou, & Ching, 2011), joint sense-making (Kohtamäki & Partanen, 2016), and the ability to see larger patterns (Aarikka-Stenroos & Jaakkola, 2012) are highlighted. The expertise and skills of PSP are utilized to facilitate the collaboration, especially the explication and combination of tacit knowledge (Kohtamäki & Partanen, 2016; Kohtamäki & Rajala, 2016).

Literature provides insights into how PSP uses its expertise in the collaboration process (e.g., by focusing on customer-consultant interaction via a series of linked activities) (Bitner, Ostrom, & Morgan, 2008). The professionals use their expertise to engage customers in the value creation process: diagnosing needs, designing and producing the solution, organizing the process and resources, managing value conflicts, and implementing the solution (Aarikka-Stenroos & Jaakkola, 2012). During this process, professionals use their expertise by adopting several resource-integration roles (e.g., delegator, coach, partner, mentor, and validator). They support customers' resource integration by applying appropriate resources with varying combinations (Ng, Plewa, & Sweeney, 2016). Achieving a mutual understanding in solution co-creation calls for developing platforms and procedures invoking dialogue, facilitating the identification of misunderstandings, and ensuring an inadvisable solution is not developed (Aarikka-Stenroos & Jaakkola, 2012).

However, none of these studies has focused explicitly on outlining expertise and what it constitutes of in business-to-business (B2B) services (based on co-creation). Since PS rely heavily on expertise (Windrum & Tomlinson, 1999) and have a critical

role in facilitating their customers' knowledge creation, a more detailed understanding of expertise is needed to successfully collaborate with customers in value co-creation networks. A practice approach is also important in increasing understanding regarding the strategic management of a PSF and the role expertise plays in strategy development.

The extant literature strongly focuses on co-creation between the service provider and customer (in a dyad) (Fosstenløkken et al., 2003; Payne, Storbacka, & Frow, 2008; Aarikka-Stenroos & Jaakkola, 2012; Rasmussen, 2012). Thus, focusing on co-creation in a network context is needed, along with the idea that the practices and activities of co-creation may differ when multiple actors are involved. The literature also tends to focus on specific cases to highlight developing a specific service innovation or solution (e.g., Aarikka-Stenroos & Jaakkola, 2012; Jaakkola & Hakanen, 2013). Relatively little research is available that focuses explicitly on the PSP resource base, resource integration, and transfer in practice (Fosstenløkken et al., 2003; Anand et al., 2007; Boussebaa & Morgan, 2017). This research aims, for its part, to address this omission.

1.2.3   Resources and their development

In a B2B context, the research conducted by Industrial Marketing and Purchasing Group since the beginning of the 1980s has challenged traditional ways of examining B2B marketing (moving the focus from single purchases toward relationships). Their work has shown the importance of interaction between service providers and customers during business relationships (Gadde & Håkansson, 1992, 2011), paving the way to focus more on organizations' processes, relationships with customers, and networks with stakeholders when studying the B2B context (Maclaran et al., 2011).

Discussion has also centered around resources and how, in any industrial setting, many resources are involved and connected in complex constellations (built up over a long time and consisting of tangible and intangible resources). The view of resources being interlinked and a resource appearing when combined with other resources (Gadde & Håkansson, 2011) is related to the idea that resources are not, they become – resources need to need be put to use to benefit the parties engaged in the business relationship (e.g., Vargo & Lusch, 2011b).

This study builds on the idea that as the business environment changes – with the growing importance and focus on networks (e.g., Aarikka-Stenroos & Ritala, 2017) and service systems (Edvardsson, Skålen &Tronvoll, 2015) – so does the expertise in PS change and develop. This is partly because when customers in today's knowledge economy are skilled and experienced in using external services (professional services), they expect more. Therefore, PS need to be valuable and useful for the customer from the beginning of the collaboration process and provide

not only solutions to individual problems but support the customer's business and processes (Cooper et al., 1996; Hirvonen & Helander, 2001; Toivonen, 2007). This usefulness can be enabled by designing service systems and platforms that permit and support customers and other actors in resource integration and value co-creation processes by paying attention to social structures and forces that facilitate resource development (Edvardsson, Skålen & Tronvoll, 2015).

Since this study sees expertise development as resource development occurring in interaction and collaboration (and expertise denoting the ability to use resources), a literature stream or theory is needed to help understand resources, processes, and interactions. In this study, that theory or lens is service-dominant (S-D) logic (e.g., Vargo & Lusch, 2004; Lusch & Vargo, 2006); I will briefly explain why. S-D logic is "a meta-theoretical framework for explaining value creation through service exchange among multiple resource-integrating actors." Thus, S-D logic can be seen as 1) a new paradigm in marketing and service science, 2) a theory of value creation, and 3) a perspective or mindset helping us articulate and understand the exchange and value creation in markets in a new way (Lusch & Vargo, 2006).

S-D logic builds on the literature of networks and interaction developed by the Industrial Marketing and Purchasing Group research that looks at interaction as a core process of business (e.g., Ford, 2011). However, S-D logic provides tools and perspectives to focus on co-creation (integrating, creating, and exchanging various resources in interaction). More precisely, it gives an understanding of elements through which co-creation can be understood: value propositions (co-developed understanding of benefits, articulated as promises and expectations), practices (activities and interactions in a specific context), and institutions (coordinating mechanisms, like rules, norms, and symbols enabling and constraining co-creation) (Frow & Payne, 2019). S-D logic describes human actions within social systems as enabled and constrained by social structures. These structures are expressed through norms, values, and ethical standards. They guide people in defining what is acceptable or unacceptable when interacting with others (Giddens, 1984; Edvardsson et al., 2011).

S-D logic denotes the shift from a product-centered view of markets to a service-led model, providing a new way of looking at what customers and PSP exchange in business relationships. Instead of a product (a tangible product or service as intangible product) being at the center of an exchange, the focus is on resources and services. By adopting this kind of service mindset, S-D logic highlights that the actors' knowledge and skills are fundamental to economic exchange, and by utilizing them, change can be created. The know-how, capabilities, and competencies are key resources for creating value propositions and extracting value from them as the primary source of collaborative advantage leading to competitive advantage (Maclaran et al., 2011; Lusch &Vargo, 2016). The argument is that looking at

expertise and its development through the key concepts of S-D logic enables identifying the types of capabilities needed and the nature of knowledge required for successful collaboration and allows the informal and formal structures actors learn within during collaboration (e.g., communities and spaces) to be explored and discussed. These structures can enable accessing or creating what actors need.

Figure 1 presents the positioning of this study, showing that the need for this research is introduced at the intersection of literature streams forming the theoretical basis of this study.
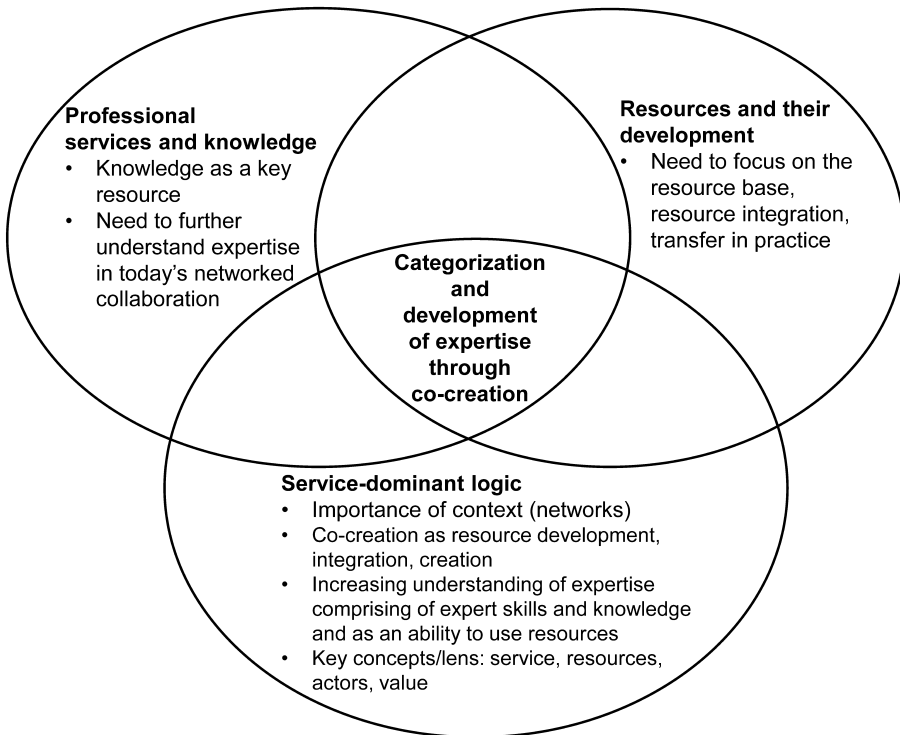
Figure 1. The positioning of the study.

For this study, the literature on professional service provides background and an introduction to PS, their key areas of expertise, and how developing expertise has been studied. The literature on expertise provides definitions and theoretical perspectives on skills and knowledge, clarifying how this study defines expertise.

This study sees expertise as comprising skills and knowledge and the ability to use resources. Expertise development is continuous, and the process in this study is viewed through S-D logic (co-creation). When expertise development is viewed through co-creation, there is a clear shift from service-provider-led development

toward a more reciprocal process during which the resources of all actors engaging in collaboration are considered crucial for success in value co-creation. This study defines co-creation as a **process of resource integration** (Payne, Storbacka, & Frow, 2008) **between stakeholders initiated by the firm at different stages of the value-creation process with a series of activities facilitated by social interaction. Co-creation is a creative collaboration process between an organization and a group or network of co-creators, involving iterative construction and deconstruction of knowledge and experience. This process is embedded in a certain value-creation context and environment** (Payne et al., 2008; Payne, Storbacka, Frow, & Knox, 2009; Mitleton-Kelly, 2011).

Consequently, this study focuses on reciprocal resource development and how it can provide a platform for expertise development by focusing on the professionals (individuals). Rather than focusing on certain special processes (e.g., service innovation or solution development), the focus is on day-to-day business and how resources develop through "business as usual." This notion builds on the idea of progressive problem-solving and continuous development of expertise through experiences and practice. Through empirical insight, the study aims to demonstrate how expertise can be developed and categorized as what it constitutes in PS.

1.3   The objective of the study

This study is at the intersection of PS and knowledge (expertise), as well as resources and their development and S-D logic. This study examines expertise development in co-creation networks in the context of PS. In addition, this research builds on the argument that the expertise needed when operating in co-creation networks differs from that needed in more traditional development and collaboration processes (between service provider and customer). Through this study, I will demonstrate these differences and show how different aspects and areas of expertise become more prominent when collaboration occurs in co-creation networks.

Looking at knowledge and expertise as a resource and studying how professionals develop their knowledge and expertise in practice when they collaborate and interact with customers, peers, and other (non)professional communities is important because, in professional service organizations, knowledge is highly practice-based and possessed by the individual professionals (Faulconbridge, 2015), providing a vital strategic resource for service innovation (Løwendahl et al., 2001). The possibilities for innovation and ideas for new services emerge from the interaction between the professional and customers, ongoing work, and organizational structure as new knowledge is acquired or expanded knowledge develops (Barrett & Hinings, 2017). Through improving knowledge development processes in professional service organizations, the knowledge of individuals can, to

some extent, become collective knowledge (Barrett & Hinings, 2017) and provide opportunities for innovation, new service development, and value creation (Dougherty, 2004). Consequently, focusing on business as usual instead of putting the focus on just special cases or specific innovations is important.

Instead of adopting the firm level, this research focuses on the micro level – on individual professionals in the field of B2B PS. Expertise development is studied by looking at collaborative processes among the service provider, customers, and other stakeholders. The discussion of different types of knowledge – knowing-what (fact-based knowledge), knowing-how (experience-based, subjective, and tacit knowledge, skills, understanding, and reflection), and personal knowledge (talent, aptitudes, artistic abilities, creativity, and intuition) (Løwendahl, 2001) – forms the basis of building the framework of expertise and its development. This study examines expertise as continuously evolving and relative to specific contextual conditions. Thus, becoming and being an expert is not only a personal but a continuous journey requiring a willingness and the ability to question one's existing skills and expand one's knowledge base (Mylopoulos & Regehr, 2007; Yanow, 2015).

The overall objective of this ethnographic case study (e.g., Hill, 1991; Ellenbogen, 2002) is to build an empirically grounded framework of expertise and its development in PS. The empirical data for this study comes from the B2B services (management consulting, business development, and coaching) context. This study answers two research questions (RQs):

RQ1: What constitutes expertise in business-to-business professional services?

RQ2: How can professionals develop their expertise in inter-organizational networks?

This thesis consists of three studies and synthesis parts. The individual studies demonstrate how a) professionals facilitate network activities, b) enable learning community creation as a prerequisite for co-creative learning, and c) utilize networks in strategizing and discussing the competencies (knowledge and skills) needed in managing one's business, especially in a micro-firm context.

This synthesis integrates the literature and empirical findings of individual studies, through which the framework of expertise in B2B professional service will be compiled. Areas of expertise introduced in the final framework are divided into four broad categories: knowing-what, knowing-how, knowing-why, and personal knowledge. This categorization highlights the areas of expertise that gain importance when professionals co-create with customers and other stakeholders. The S-D logic provides a novel approach to collaboration between professionals, their customers, and other stakeholders, providing a valuable and functional lens to co-creation.

By combining empirical evidence and literature, this study provides an empirically grounded framework of expertise in management consulting, coaching, and business development contexts. Thus, these insights should not be suggested to apply to all areas of PS. However, the insights this study presents can provide valuable knowledge and the tools to understand and develop co-creation processes in other fields of PS. Understanding expertise development through resource integration occurring in co-creation can help overcome resource scarcity and develop activities and practices for collaboration that benefit all actors involved.

This research makes several contributions. First, this study will contribute to the literature on PS by extending the ideas about key resources (critical areas of expertise) in PS, especially in management consulting, coaching, and business development. The areas of expertise explored and identified in this study stem from reciprocal development through value co-creation. Second, this study provides an empirically based framework for looking at networks as a platform for expertise development. Third, this study's findings provide new knowledge of resource integration and highlight (e.g., the importance of expertise in facilitation). The focus is on the facilitation's role in building the platform, thus creating possibilities for resource integration among actors during a joint co-creation process. The research will provide practical implications for developing, organizing and implementing co-creation – especially in PS – as well as implications that co-creation suggests for developing expert work.

1.4   Introducing the structure of the study

Following the introduction in Chapter 1, this study is structured as follows: Chapter 2 introduces this study's theoretical background with a literature review on PS and another on expertise. Chapter 3 introduces some approaches to studying resources before moving into S-D logic, focusing especially on practices, value propositions, and institutions through which the co-creation process can be analyzed and understood. Chapter 4 focuses on the methodological choices of this study and describes the ethnographic case study, research context, data collection, and analysis. Chapter 5 summarizes the original articles/studies and their objectives, methods, results, and contributions. Chapter 6 focuses on introducing this study's findings and building the framework of expertise (what expertise consists of in B2B services and how it can be developed through co-creation), thus providing answers to the RQs. Chapter 7 discusses this study's results, outlines the future research topic, and highlights the theoretical and managerial contributions. **Figure 2** introduces the study's outline.

Chapter 1: Introduction

Chapter 2: Theoretical background: professional service and expertise

Chapter 3: The expertise development through co-creation in networks. Introducing service-dominant logic as s lens for studying expertise developement

Chapter 4: Methodology

Chapter 5: Summary of the original articles

Chapter 6: Building the framework – discussing the findings of the study

Chapter 7: Conclusion Summary of the results and discussion with conclusions

Figure 2. The structure of the study.

2 Theoretical Background: Professional Services and Expertise

2.1 Professional services

What are PS, especially regarding key resources, and what makes them distinct? This chapter reviews the literature on PS, discusses the importance of the resource base, and builds the link to co-creation. The literature cited here does not attempt to represent an exhaustive list of publications focusing on PS but provides an introduction before moving on to the empirical part of this study.

The literature on PS has its roots in research in organization theory (Barley, 2005; Blau & Scott, 1962). Later, the discussion moved to characteristics of professions (e.g., doctor, lawyer) (Cogan, 1953; Goode, 1957; Millerson, 1964; Wilensky, 1964), and then in the 1960s to discussing professional organizations, meaning the organization of professionals (Miller, 1967; Montagna, 1968; Bucher & Stelling, 1969; von Nordenflycht, 2010). The literature on PSFs has its origins in the 1990s (focusing on commercial firms, law, accounting, management consulting, and being managerially oriented) (Cooper, Hinings, Greenwood, & Brown, 1996; Maister, 1993; Winch & Schneider, 1993; von Nordenflycht, 2010).

The literature contains several definitions of PS and knowledge-intensive business services (KIBS). Generally, KIBS can be defined as services involving economic activities to create, accumulate, or disseminate knowledge or as "expert companies that provide services to other companies and organizations" (Toivonen, 2006). Bettencourt et al.'s (2002, 100-101) definition is more precise and adds the idea of value creation: "enterprises whose primary value-added activities consist of the accumulation, creation, or dissemination of knowledge to develop a customized service or product solution to satisfy the client's needs." The key denominator is the expert knowledge and its development and utilization while collaborating with customers. This study utilized and reviewed the literature on KIBS and PS. For clarity and readability, I will use the term PS throughout my study, not both.

What makes PS an intriguing context for research? As von Nordenflyct (2010) states, PSFs are interesting because of their distinctiveness, which stems from the idea that they face an environment calling for a special type of management. Other industries can learn much about knowledge intensity by benchmarking PSFs and

looking at how they manage changing markets and environments. Thus, PSFs are considered role models and vital drivers of the knowledge economy's development (Skjølsvik, Pemer, & Løwendahl, 2017; Løwendahl, 2000; Brock, Powell, & Hinings, 2007; Gardner, Anand, & Morris, 2008).

PS is also distinct in that the service usually needs to be customized (tailor-made solutions) for each client, entailing flexible and responsive organization. When extensive customer interaction exists, bringing its own challenges and expertise related to interaction and facilitation is called for; standard processes and procedures must be scarce, and each professional needs to have autonomy and authority to deliver what best serves each customer's needs for a PSF to remain innovative (Løwendahl, 1997). The literature introduces several characteristics that define PS. These characteristics are collected in **Table 1**. Although these characteristics may not simultaneously apply to all services defined as PS or represent an exhausting list, they introduce the main features that make PS unique.

Table 1. Characteristics of professional services.

Author(s) Year	Characteristics of professional services
Starbuck (1992) Winch & Schneider (1993) von Nordenflycht (2010) Morris & Empson (1998) Brivot (2011)	PS are characterized by knowledge intensity; producing a firm's output relies on a substantial body of complex knowledge (e.g., Starbuck, 1992; Winch & Schneider, 1993; von Nordenflycht, 2010). Typically, PS provide intangible experiential services as knowledge-rich, time-sensitive advice to customers (Morris & Empson, 1998; von Nordenflycht, 2010; Brivot, 2011).
Hedberg (1990) Sveiby & Risling (1986)	A key characteristic of knowledge-intensive organizations is the capacity to solve complex problems through creative and innovative solutions and the ability to produce exceptional results with the help of outstanding expertise.
Svensson (1990) Alvesson (1995)	Technical and theoretical knowledge is not everything since uncertainty, complexity, instability, and uniqueness characterize day-to-day work. The work tasks vary considerably. The capacity to adapt to various contexts is an important skill and differs from applying a specialized set of knowledge.
Alvesson (2000)	Knowledge-intensive work is characterized by ambiguity, meaning the abilities to deal with rhetoric, regulate images, and manage relationships and interactions with customers are central characteristics of knowledge-intensive work.
von Nordenflycht (2010)	Low capital intensity means that producing services does not involve significant amounts of nonhuman assets (inventory, factories, equipment patents, or copyrights).
Nanda (2002) von Nordenflycht (2010)	PS are characterized by professionalization (features aside knowledge-intensity): ideology referring to the professional codes of ethics (Nanda, 2002) and norms that define appropriate behavior for professionals, together with self-regulation (professionalized occupations having strong control over the practice of the said occupation) (von Nordenflycht, 2010).

Author(s) Year	Characteristics of professional services
Empson, Muzio, Broschak, & Hinings (2017) Dougherty (2004) Gann & Salter (2000) Løwendahl (1997 & 2001)	Knowledge-intensity in value creation and service delivery by highly educated employees who keep current with research and scientific development within their area of expertise. Professional assessment by experts forms the basis of the services in the field. Services involve a high degree of personal judgment by the experts; in some industries, this means personal legal responsibility for potential liability claims. Customizing services to fit each customer's needs by applying specialist knowledge (Løwendahl, 1997 & 2001). A high degree of interaction with a customer is needed in diagnoses (of customers' needs and challenges) and service delivery (Løwendahl, 1997 & 2001; Empson et al., 2017; Gann & Salter, 2000; Dougherty, 2004). Individuals are typically trained in a standardized body of knowledge, which is common to all professionals in that sector and is certified by the relevant professional authority. Professional norms of conduct restrain services (e.g., setting client needs higher than profits and respecting the limits of professional expertise) (Løwendahl, 1997 & 2001).

As the characteristics in the previous table show, the literature illustrates PS as intangible and heterogeneous, typically being customized for individual customers' unique needs and produced and delivered during an interactive process (Thakor & Kumar, 2000). PS are also seen as knowledge-intensive, with knowledge being the core product (Sarvary, 1999) and delivered by people with higher education. Substantial interaction with the customers is required; professional norms of conduct guide the service delivery, such as placing client needs above profits and respecting the limits of professional expertise (Løwendahl, 1997; Fosstenløkken et al., 2003). PS are distinguished by interaction (e.g., Lovelock & Wirtz, 2006) and a high degree of personalization and customer disposition to participate (Larsson & Bowen, 1989).

One way to explain what services are professional is to use a taxonomy based on the characteristics of PS: knowledge intensity, low capital intensity, and professionalization. According to von Nordenflycht (2010), PSFs can be divided into Classic PSFs, Professional Campuses, Neo-PSFs, and Technology Developers. Law and accounting firms are classical PS with the highest degree of professionalism and professions with ideology and self-regulation. Hospitals can be considered professional campuses; compared to Classic-PSFs, there is specialized physical

infrastructure and thus capital intensity. Management consulting, coaching, advertising and business development that are of interest in this study, belong to the next category: the Neo-PSFs. In this category, knowledge intensity is seen more broadly instead of being connected to strictly defined professions. Technology Developers belong to R&D labs and biotechnology; in these capital-intensive firms, the workforce is mainly engineers and scientists. There are also arguments that many of today's new services and activities may not fit into these categories but are breaking boundaries. That is why PSFs (and KIBS) could be defined more broadly as *"enterprises, which are characterized by the ability to receive information from outside the company and to transform this information together with firm-specific knowledge into useful service for their customers"* (Hipp, 1999, 93).

Empson et al. (2017) build their definition of PS on four central characteristics. They start from the customization (providing customized solutions to a customer's needs) and see it as the most defining characteristic of PS. Knowledge as a second characteristic is considered a core asset, including specialized knowledge of professionals and in-depth knowledge about customers. The third defining characteristic is autonomy – the right to choose how to best employ specialized skills and knowledge when delivering services. They add the idea of identity, meaning those working on a PSF recognize each other as professionals, with customers and competitors seeing them as such.

Is there some way to differentiate KIBS from PS, despite being considered synonymous? According to Løwendhal (2001), knowledge-intensive service is not professional if it is mass-produced. If the professional norm of protecting a customer's best interest or the professional norms of ethics are violated, it is unprofessional; maximizing profits comes with the price of compromising the quality of service. These delineations highlight customization, customer-centricity, and the importance of professional norms.

2.2 Key resources comprising expertise in professional services

2.2.1 Discussing expertise

As this study focuses on expertise and its development, discussing and defining expertise is important before moving into key resources in PS. This chapter does not focus on giving an extensive review of different literature streams and definitions stemming from them but briefly summarizes expertise and how this study defines it. Researchers from several disciplines have approached the study of expertise and brought their own backgrounds and focus, resulting in a variety of definitions and making it difficult to generalize the definition of expertise across different disciplines

(Garrett, Caldwell, Harris, & Gonzalez, 2008). When discussing expertise, denoting the dual meaning of expertise is important. Gobet (2016) explores expertise from a wide range of disciplines – psychology, neuroscience, sociology, philosophy, law, and artificial intelligence – and refers to the Oxford Talking Dictionary (1998) in which expertise is defined as expert opinion or knowledge, know-how, skills, or proficiency in a subject. The duality stems from the fact that an expert opinion or knowledge is about knowing-that, whereas the other meaning highlights the skill – the knowing-how (Gobet, 2016).

Who, then, is an expert? Some definitions of expertise and expert stem from the idea of acquiring experience and the time spent in a certain domain, although it can be argued that the time spent does not necessarily indicate expertise (Ericsson, Krampe, & Tesch-Römer, 1993; Richman, Gobet, Staszewski, & Simon, 1996). Expertise is attained with effort and is an intentional process with a clear goal (Bereiter & Scardamalia, 1993). Thus, becoming an expert involves stages (Dreyfus & Dreyfus, 1988) and developing intuition; human cognition is situated, embodied, and experimental. As one becomes an expert, one progresses from conscious, analytic, and deliberate behavior and reliance on instruction to behavior that is intuitive, fluid, and naturally aligned with the environment's requirements (e.g., Gobet, 2016).

The definitions focusing on deliberate practice: Experts must practice selected components of their skill instead of only performing routine actions; thus, the expertise is something that develops over time (Ericsson et al., 1993). The fact that experts consciously address problems, whereas nonexperts carry out routines, is highlighted (Bereiter & Scardamalia, 1993). Expertise can thus be defined as surpassing oneself in progressive problem-solving, meaning an expert defines and redefines their tasks at higher and higher levels. Instead of incorporating a particular solution to a problem into their routines, an expert aims to gain an even deeper understanding of the subject for future reference (Bereiter & Scardamalia, 1993; Tynjälä, 1999). An expert obtains results vastly superior to those that most of the population obtains (Gobet, 2016, 5).

The existing literature also highlights that experts are fluid in their behavior and require only a few conscious decisions (Gobet, 2016; Dreyfus & Dreyfus, 1988). Experts and highly skilled operators can better determine what information is relevant in a given situation and utilize more sources of pertinent information during a task than less skilled operators (Mieg, 2001). Thus, the distinction between novices and experts is not based (solely) on the amount of knowledge one has accumulated in a specific domain but on the interaction between general domain knowledge and a specific case (Scardamalia & Bereiter, 1993), as well as how they can apply their knowledge in different situations and new contexts. According to Simons and Rujters (2004), expertise development occurs through a) elaborating and developing

work competencies, b) expanding theoretical knowledge and insights, and c) sharing the practical and theoretical insights to benefit the team, organization, or even the overall profession. Some want to focus on the role of talent. If the focus is on innate talent (no input from practice explaining expertise), then the role of learning and developing expertise is downplayed. In contrast, if practice is emphasized, the argument is that learning is the only path to expertise (Gobet, 2016, 138).

Most of the definitions of expertise previously presented originated in psychology, focusing on the performance of experts and the process of becoming one. From the perspective of sociology, the interest lies in how society defines experts. Since this study focuses on (value) co-creation, which is processual, interactional, and social, noting the social aspect of expertise is important. It is central if one adopts the standpoint that "*human activity, including knowledge, basically routes in an adaptation to the environment's constraints: every human thought and action is adapted to the environment, that is, situated, because what people perceive, how they conceive of their activity, and what they physically do develop together*" (Mieg, 2001, 6–7). When focusing on social systems and situations, the "*construct of expertise is seen as jointly determined by individual skills and knowledge, and the needs, perceptions, and activities of the members of the social system with whom the experts interact*" (Stein, 1997, 182).

Expertise or being an expert can be a label that society or certain groups give individuals. One can be considered an expert if one has an official university or professional title or even if the community perceives someone as an expert (e.g., a "local technology wizard") (emphasis original) (Gobet, 2016, 5). The motivation to grow and practice as an expert is also linked to social systems since experts work and interact in expert subcultures. Thus, expertise exists within a certain field. Within an expert subculture, progressive problem-solving and continuous competence building are central to one's participation in the life of the expert community (Bereiter & Scardamalia, 1993, 105). Gobet (2016, 246) summarizes how and why someone becomes an expert: "*early start, existence of role models, presence of feedback during practice and expertise development in general, family and community support, and presence of talent.*"

For this study, a twofold definition of expertise is adopted. First, expertise is defined as something that results from learning (resource development) and experience and develops through deliberate practice, consciously addressing challenging problems (Ericsson et al., 1993; Bereiter & Scardamalia, 1993). Expertise results from having the courage to step out of one's comfort zone and try new things deliberately, thus challenging oneself. Second, expertise is developed and appreciated in interaction, considering the social aspects of expertise. Thus, expertise is seen as jointly determined by individual skills and knowledge and by the needs, perceptions, and activities of the members of the social system with whom the

experts interact. Individual skills and knowledge gain meaning in the social system to which an expert belongs (Stein 1997, 182). However, many terms denote what a person knows or can do and what expertise comprises: skills, capabilities, and competence. **Table 2** discusses these concepts.

Table 2. Expertise and concepts close to it.

Author	Concept and definitions from the literature
Skill(s)	
Dawson (2000)	Unique to people and a vital component of knowledge (usually refers to a tacit component of knowledge). Skills are significant components of the action in the capacity to act effectively.
Löbler (2019)	Denotes the ability to act or do; to perform or carry out specific known procedures.
Scmidt & Boshuizen (1993)	Learned and needed to perform a task. Are about task performance. Not an action based on procedural memory alone. Knowledge is needed when deciding to use a certain skill (situational understanding).
Eraut (2004)	Something that is learned to carry out one or more job functions, allowing representations of competence, capability, and expertise.
Proctor & Dutta (1995)	Goal-directed, well-organized behavior acquired through practice and performed with economy of effort and development over time (through practice). Can be divided into perceptual, response selection, motor, and problem-solving skills.
Sanchez, Heene, & Thomas (1996)	
Sanchez (2004)	Skill is a special form of capability, typically embedded in individuals or teams. Useful in certain situations or when using a particular resource.
Capability/Capabilities	
Brown & McCartney (1999)	Concerned with the ability to do, but not as easy to define as competence, being only apparent "in its reflection" and having a know-it-when-you-see-it property that cannot easily be translated into standards and specifications.
Lester & Chapmann (2000)	While competence is concerned with fitness for purpose (or getting the job right), capability is concerned with reaching conclusions with fitness of purpose (or making judgments about the right job to do).
Lester (2013)	Being functionally competent and aware of the limits of one's competence and how to overcome them in a given situation.
Stephenson (1998)	Is about intelligent judgment, ethical practice, self-efficacy, and competence.
Dawson (2000)	In an organizational context, capabilities focus more on skills and processes.
Teece, Pisano, & Shuen (1997); Zahra & George (2002)	Dynamic capabilities, such as absorptive capacity (the ability to recognize the value of new information, assimilate it, and apply it to commercial ends), are embedded in organizational processes.

Author	Concept and definitions from the literature
Makadok (2001)	Capabilities are considered an ability to deploy resources through a firm.
Day (1994)	Can be defined as accumulated knowledge and skills that enable coordinating activities and advantageous resource deployment (Day, 1994).
Möller & Törrönen (2003)	Capabilities that form the basis for an organization's value creation are organizational and often (at least partly) tacit and not easy to benchmark. They can be divided into production, delivery, process improvement, incremental innovation, relational, networking, radical innovation, and mastering the customer's business capability.
Sanchez et al. (1996); Sanchez (2004)	Capabilities are repeated patterns of action in using resources to create, produce, and/or offer products to a market. They rise from the coordinated activities of groups combining their skills using resources.
Competence/Competencies	
Lester (2014); Eraut & du Boulay (2000)	Broadly concerned with what one can do (notions of competence are used in many occupational standards, fitness of purpose, or getting the job done). The ability to perform tasks and roles to the expected standard.
Eraut (1994)	Can be looked at by focusing on the individual's attributes and abilities (competency referring to one's behavior as underpinning competent performance) or activities and functions that need to be performed to meet expectations (aspects of the job one can perform).
Boyatzis (1982)	Competence represents the capability one brings to a job.
Roach (1992); Winterton, Delamare-Le Deist, & Stringfellow (2006)	Having the knowledge, judgment, skills, energy, experience, and motivation to adequately correspond to the demands of one's professional responsibilities (Roach, 1992). Can also be divided into general problem-solving competence, critical thinking skills, domain-general and domain-specific knowledge, realistic, positive self-confidence, and social competencies) (Winterton et al., 2006).
McLagan (1997); Herling (2000); Westera (2001)	Competence can be considered the outcome (McLagan, 1997) and a specific knowledge set (Herling, 2000). Competence is a related construct and component of expertise, "defined as displayed behavior within a specialized domain in the form of consistently demonstrated actions of an individual that are both minimally efficient in their execution and effective in their results" (Herling, 2000, 20). It transcends the levels of knowledge and skills to explain how knowledge and skills are applied effectively (Westera, 2001).
Prahalad & Hamel (1990)	On the organizational level, core competencies can be defined as the collective learning in the organization, especially how to coordinate diverse production skills and integrate multiple streams of technologies. A core competency is the combination of resources and skills that distinguish a firm in the marketplace.
Hunt (1997 & 2000)	Organizational competencies are "higher-order, socially complex, highly interconnected, combinations of tangible and intangible basic resources that fit coherently and help a firm efficiently/effectively produce valued market offerings."

Author	Concept and definitions from the literature
Sanchez et al. (1996, 8); Sanchez (2004)	"Competence is the ability to sustain the coordinated deployment of assets in ways that help a firm achieve its goals."
Expertise	
Swanson (1994, 94)	"Optimal level at which a person is able and/or expected to perform within a specialized realm of human activity."
Herling (2000)	A dynamic state and domain-specific (consisting of basic components of skills, knowledge, experience, and problem-solving) (13). Thus, expertise can be defined as "displayed behavior within a specialized domain and/or related domain in the form of consistently demonstrated actions of an individual that are both optimally efficient in their execution and effective in their results" (20).
Sarasvathy (2008,12)	"Expertise consists of tacit as well as learnable and teachable aspects of expertise that are related to high performance in a specific domain." An expert is someone who has reached a high level of performance in the domain resulting from years of experience and practice.

As the definitions and descriptions of these related concepts show, finding one all-encompassing definition for each concept is challenging, if not impossible, because each is discussed in various literature streams. Some researchers have also constructed hierarchies of these concepts based on the idea that competencies and/or capabilities are higher-order resources in that they are bundles of basic resources (e.g., Hunt, 2000; Collis, 1994; Winter, 2003). However, a hierarchical examination is not the focus of this study. Common to the definitions in **Table 2** is that skill(s) are seen as something one has and needs to develop. When one is highly skilled, they can be seen as having competence. Competence is considered more of an end state and capabilities a process; capabilities are more difficult to define and assess than competencies. Competencies and capabilities are examined in the existing literature from two perspectives – from an individual and from an organization. Some consider competencies and capabilities interchangeable (Day, 1994; Hunt & Madhavaram, 2006).

Whether we talk about skills, competence, capabilities, or expertise, different types of knowledge are needed and cultivated to develop competence and capabilities. More precisely, knowledge is applied using skills (Löbler, 2011). Skills are part of personal knowledge and cultural understanding and knowledge (Eraut, 2000). Thus, knowledge is due to an interaction between intelligence (denoting the capacity to learn) and situation (denoting the opportunity to learn). The literature on PS builds on knowledge in defining (at the firm level) it as "*the combination of skills, routines, norms, and values developed and shared by at least two employees working together, each employee's knowledge, and the information available to them*" (Løwendahl et al., 2001, 917). Therefore, discussing the concept of knowledge as a key (operant) resource in PS in more detail is important.

2.2.2   Knowledge as a key resource in professional services

According to S-D logic, specialized skills and knowledge are operant resources providing competitive and/or collaborative advantage (Madhavaram & Hunt, 2008). The resource base of a PSF can be defined as the combination of the tangibles (e.g., finances, buildings, production machinery) and the intangibles (e.g., professional expertise, reputation, client loyalty, corporate culture, and management skills), which can be applied to generate value for the firm and its stakeholders.

For a PSF, knowledge represents the key strategic intangible/operant resource (Løwendahl, Revang, & Fosstenløkken, 2001). Specialist skills and knowledge acquired through extensive and formal training and practice are utilized to solve the problems and challenges customers have. This study understands knowledge to be quite a broad term and includes tacit (the kind of knowledge difficult to transfer to another person orally or by writing it down) and explicit (i.e., expressive knowledge that can be readily articulated, codified, stored, and accessed) (Polanyi, 1958). The literature on workplace learning, education, and PS includes a discussion about expertise and different types of knowledge. Knowledge is divided into categories or types. Common to these categorizations is the difference between practical and more theoretical knowledge. There is also an element of personal knowledge. Since this study focuses on professional service, more precisely on B2B services, a categorization of knowledge in the literature of PS is adopted. Løwendahl et al. (2002) define knowledge as a resource at the individual level and divide it into three types. The first is fact-based or knowing-what, comprising information-based, objective, and task-related knowledge (universal, formal, and explicit; can be explicated, e.g., in books and lectures). The second type is experience-based or knowing-how, including subjective and tacit knowledge, skills, understanding, and reflection (not so easy to explicate; intuitive, implicit, or tacit; case-specific and gained through practical experiences). The third is personal knowledge, denoting talent, aptitudes, artistic abilities, creativity, and intuition (Løwendahl, 2001; Bereiter, 2002; Bereiter & Scardamalia, 1993; Tynjälä, 2008). This type of knowledge can be called dispositional knowledge (Brown & Duguid, 1998).

When these three elements/categories are considered, the distinction between novices and experts is not based on the amount of knowledge one has accumulated in a specific domain but on the interaction between knowing-what and knowing-how (a particular case) (Scardamalia & Bereiter 1991). Knowing-what is turned into skills when theoretical knowledge is used in real working-life situations to support problem-solving. When knowing-how is reflected and conceptualized, it becomes part of an expert's theoretical knowledge base. Motivation is essential in this process – the drive to grow and practice as an expert (Tynjälä, 2008, 144-145; Bereiter & Scardamalia, 1993, 66).

The research on expertise has focused on identifying and categorizing the components or elements of expertise on an individual level (Bereiter & Scardamalia, 1993; Eraut, 1994, 2004; Le Maistre & Paré, 2006). The individual level is the focus of this study, too. However, since, in this study, the interest lies in looking at expertise in the co-creation context, the interpersonal and social aspects of expertise in PS need to be incorporated to understand expertise in a group setting (e.g., knowing how to get others to do as one intends or how to coordinate the activities of others). In PS, especially in management consulting, coaching, and business development, interaction and collaboration are often based on working in groups and with groups of people. And when the idea is to leverage the expertise (skills and knowledge) of the whole group, the focus is not only on the individual experts but at the group level. Caldwell (1997) discusses the social and interpersonal aspects of expertise by focusing on an explanation of expertise that can optimize group interactions. The emphasis is on structuring the distribution and utilization of expertise in a group setting and the relevant social and contextual issues. Garret et al. (2008) have identified elements of expertise required to enable successful group interactions:

- Subject matter (knowledge about "what" and "how" something works in a specific domain; information flow among team members).
- Situational context (recognizing environmental and situational demands; ability to identify and understand the current and changing context; knowing "when," "where," and "why" certain topics and stimuli are relevant).
- Interface tools (skill in using complex technological systems; an emphasis on the process of information flow, usually between the human and system interfaces).
- Expert identification (knowing who has what level of expertise in a specific area; ability to create a network map of other individuals' expertise levels; ability to "collect people").
- Communication skill (ability to transmit knowledge and information effectively – the knowledge of what and how to communicate).
- Information flow path expertise (the technical knowledge of what communication paths exist and which is most appropriate to use in each situation).

The existing literature has elaborated on the role of management consultants as disseminators of business knowledge (Sturdy, Clark, Fincham, & Handley, 2009). They can be key agents in adopting new management ideas and practices in organizations, bringing new knowledge to customers or those who legitimate client knowledge (Sturdy et al., 2009). Professionals can bring technical, experiential, or facilitation expertise and an external view (Werr & Styhre, 2003); therefore, their work is based on "other types of expertise than that of the customers" (Armbrüster,

2006, 52). Also, especially in executive coaching, the objective is not so much to offer instant, ready-made solutions but to foster learning and change. Coaches may use a range of interventions to promote learning. For instance, listening, understanding, and encouragement from the coach positively impact the customer's mind. Empathy, authenticity, and involvement are also emphasized (de Haan, Culpin, & Curd, 2011). When professionals collaborate with their customers, they acquire knowledge from them, allowing them to offer customer-specific solutions while enhancing their own knowledge base (Muller & Zenker, 2001). This view highlights the win-win situation inherent in S-D logic and its view on co-creation: understanding the joint problem-solving process is crucial (i.e., the core of PS). It is about jointly defining the problem, problem-solving, and allowing the customers to co-construct the service experience to suit their context (Aarikka-Stenroos & Jaakkola, 2012). Thus, creating an experience environment for continuous dialogue is essential (Prahalad & Ramaswamy, 2004, 8). These examples provide evidence of professionals utilizing their expertise (knowledge and skills) in practice. Co-creation with a customer when the challenges or problems addressed are novel and unstructured will likely increase knowledge development because of the higher demand for new ways of thinking and tailoring the solution (Skjølsvik, Løwendahl, Kvålshaugen, & Fosstenløkken, 2007, 113). Thus, co-creation processes provide a valuable and fascinating arena to study expertise and its development. **Figure 3** brings together the categories of knowledge in professional service; these types of knowledge that are building blocks of expertise are developed in the interaction between capacity and a situation, permitting and enabling learning.

Knowledge in professional services = the combination of shared skills, routines, norms and, values

Knowing-what	**Knowing-how**	**Personal knowledge**
• Fact-based knowledge • Theoretical understanding • Subject-matter	• Experience-based knowledge • Interaction • Practice • Contextual • Groups	• Talent • Aptitude • Creativity • Skills • Intuition
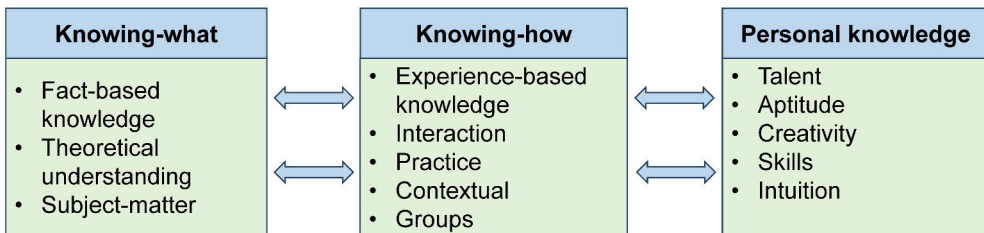
Explicit ⟷ Tacit

Knowledge develops = is due to an interaction between capacity to learn and situation/an opportunity to learn.

Figure 3. Summary of knowledge as a key resource.

3   Resource Development

3.1   Approaches to studying resources

Previous chapters discussed the importance of key resources in PS. The knowledge base is built through learning by doing, education, contacts, networking, exposing oneself to new areas, getting out of one's comfort zone, and learning divergent and imaginative thinking – creating meaning through experience. Resources and their development are a phenomenon that has been viewed from several perspectives. To develop a richer depiction of resources and find the focus for my approach, I aim to compare different approaches next. The literature streams focusing on resources and their development are the RBV of the firm, the dynamic capabilities view, IMP research, and S-D logic.

3.1.1   The resource-based view and dynamic capabilities

Understanding resources as the source of sustained competitive advantage for firms has long been a major area of research in management. An RBV has its origins in strategic management and strategy research. This view was originally developed to complement the industrial organization view, placing the determinants of firm performance outside the firm in industry structure; in an RBV, internal resources are the source of competitive advantage. An RBV is a theory about what firms are and how they function, which highlights path dependence (history and choices made before) and heterogeneity (every firm is different) (Lockett, Thompson, & Morgenstern, 2009). An RBV defines resources as a collection of assets tied semi-permanently to the firm. There are tangible or physical assets and brand names, less tangible organizational routines, and capabilities (which can be dynamic, like learning). Resources are considered specific to the firm (since they are a consequence of its past) and thus difficult for others to replicate. A firm is a bundle of resources whose value is in constant flux (Lockett et al., 2009). From an RBV view, assessing whether a particular resource is a source of sustained competitive advantage means evaluating whether it is valuable, rare, imperfectly imitable, and non-substitutable with some other resource (Barney, 1991).

When viewing resource development from the perspective of RBV, the role of managers and their capabilities in acquiring necessary resources seems especially important. They are responsible for searching for novel uses of existing resources. Combining resources in a different way creates value (complementarity, relatedness, and co-specialization). Resource combination and recombination are central in the literature on capabilities. Capability is a firm's ability to undertake productive activity created through simultaneously deploying resources and production factors. Current capabilities are elaborated through pioneering and creative learning. Resources can be acquired (e.g., through mergers and acquisitions) and other collaborative associations (Lockett et al., 2009).

From an RBV originates the dynamic capabilities view. It could be argued that the view of resources in RBV is static; thus, there has been a need for a more dynamic approach. The advances in dynamic capability literature, entrepreneurship, and Austrian economics partly answer this need (Kraajienbrink, Spender, & Groen, 2010). Dynamic capabilities are considered specific processes firms use to alter their resource base. Thus, capabilities can be considered a firm's capacity to deploy resources (Makadok, 2001). Dynamic capabilities are embedded in a firm's managerial and organizational processes (e.g., product development, resource-transferring processes, knowledge creation, strategic decision-making, and alliance formation) (Eisenhardt & Martin, 2000). The ability to change and learn are possibly among the most critical capabilities for firms (Barney, 2001), which is reflected in the dynamic RBV with the notion of continuous adaptation, integration, and/or reconfiguration of capabilities into other resources and capabilities (Eisenhardt & Martin, 2000; Teese, Pisano, & Shuen, 1997). Other additions to the RBV and related analyses, in addition to dynamic capabilities, are core competencies (Prahalad & Hamel, 1990), a knowledge-based view (Grant, 1996), and network management/networking capabilities (Möller, Rajala, & Svahn, 2005). Researchers also highlight that the research on dynamic capabilities would benefit from incorporating the concept of time, space, and uncertainty resolution, thus moving toward an inherently social and more subjectivist approach (Kraajienbrink et al., 2010).

3.1.2   The industrial marketing and purchasing group

The IMP research has focused on B2B relationships (industrial buyer-seller relationships), concentrating on the importance of close relationships. Thus, IMP research has presented a view that shifts the focus from managing resources to managing relationships, laying the foundation for research on industrial relationships (Håkansson, 1988). Although beginning with a dyadic perspective, the focus moved toward a network perspective (Axelsson & Easton, 1992). Further work by the IMP

Group includes another approach – the network approach – which focuses on relationships in business markets; industrial markets can be represented as exchange relationships among multiple organizations. The network approach addresses multiple dimensions of buyer-seller relationships and focuses on interactions between actors (e.g., Möller, 1993).

Another important result of the IMP Group's work is the ARA model (Anderson, Håkansson, & Johanson, 1994), which characterizes the function of business relationships through three essential components: actors, activities, and resources. Actors control activities and/or resources, they can be collective actors (groups, organizations, groups of organizations), and individuals. Actors are responsible for building and maintaining relationships with other actors. Although industrial relationships tend to be long-term, this does not mean they stay unchanged. People engaged in the relationship affect how it develops. Resources are needed to conduct activities, and different kinds of resources are identified: human, technical, financial, procurement, and marketing. Therefore, activities are based on resources because resources are used during the activities to cultivate other resources (Gadde & Håkansson, 1992).

The studies focusing on innovations in the B2B context continue and build upon the IMP Group's work. For example, studies concentrate on network participants' interpretations of innovation, diffusion, and adoption processes (Gupta & Woodside, 2006) or the shift from product innovation to industrial service innovation and the importance of employees and customer interaction for innovation (Panesar & Markeset, 2008; Syson & Perks, 2004). Much research has focused on the relationship between the value of industrial services and the revenue generated by services (Barry & Terry, 2008; Oliva & Kallenberg, 2003), followed by the shift from offering service to offering solutions has (Cova & Salle, 2008). Cova and Salle's (2008) work concentrates on solutions offering co-creation and involving customer network actors to value co-creation. Further, value co-creation based on the ideas presented in Nordic School – such as those by Gummesson (2008), Prahalad and Ramaswamy (2004), or Vargo and Lusch's (2004) S-D logic perspective – are still growing in interest and evolving into a new paradigm in markets and marketing.

3.1.3   Comparing the approaches to resource development

S-D logic has its origins in marketing, providing a different approach to service, markets, and value exchange, with links to various literature streams (e.g., effectuation) (Sarasvathy, 2001), practice approach (e.g., Nicolini & Monteiro, 2017), structuration theory (Giddens, 1984), RBV, and dynamic capabilities. The

works of the IMP Group and their examples and evidence regarding actors, activities, and resources have also influenced S-D logic.

S-D logic emphasizes all exchange into resources. Resources are exchanged, developed, and integrated between actors (individuals, organizations, or networks) through service (the co-creation process). S-D logic provides a more open view of resources since, according to it, resources are a function of human appraisal. Resources are anything actors can draw on for support; thus, resources are inherently dynamic as actors obtain the knowledge and skills to convert latent or potential resources into actualized resources. Instead of resource scarcity, S-D logic encourages us to view resources differently: potential resources can be combined with other possible resources in infinite ways to create new resources, thus creating a new context (Lusch & Vargo, 2016). **Table 3** compares these approaches.

All the approaches above constitute extensive literature streams and have increased our understanding of resources: their use, development, and acquisition. Starting from the RBV, each literature stream builds on one another by adding new focuses and providing different views on resources and their development. However, the RBV, the dynamic capabilities view, or the IMP research approach are not best suited to answer this study's RQs. First, because the RBV focuses on resources and their development at the organizational level (taking a quite static view of resources), this study focuses on the individual level, with the professional in the center and the interest in their expertise. Second, the dynamic capabilities view the dynamic capabilities in a firm's processes; this study focuses on the process of an expert or professional adopting the micro perspective.

The S-D logic approach provides a helpful lens to study expertise and its development because it builds on the ideas in other research streams, meaning the ideas from other research streams are useful and provide valuable knowledge when looking at resources However, S-D logic also focuses explicitly on service-for-service exchange – the reciprocal application of resources for others' benefit (Vargo & Lusch, 2004). Focusing on service (singular) steers attention to the process (enabling looking at expertise development) rather than the units of output exchanged. Hence, value creation occurs in networks in which resources are exchanged among multiple actors and is, therefore, more accurately conceptualized as value co-creation (Vargo & Lusch, 2008a; Vargo, Maglio, & Akaka, 2009).

S-D logic also enables understanding the aspects affecting co-creation (shared institutions) and provides tools for understanding the elements through which co-creation occurs (value propositions, practices) because the discussion has moved toward a dynamic, systems orientation in which value co-creation is coordinated through shared institutions (Vargo & Lusch 2016; Frow & Payne, 2019). S-D logic focuses on actors – using the generic term actor for individuals, organizations, customers, or service providers – to study resource development in different

contexts, and in dyads, triads, networks, and service systems. Moreover, instead of talking about developing competitive advantage, discussing collaborative advantage (and what it suggests for resource development) would be more useful in today's networked way of collaborating with customers and other stakeholders, as highlighted in S-D logic (e.g., Vargo & Lusch, 2004 & 2006; Lusch & Vargo, 2016).

Table 3.   Comparing the approaches to resources and their development.

Approach	Definition of resources	Resource development	Fit for the study	The level at which resources are studied
RBV (a theory offering insights about the decision-making behavior of managers, what firms do, and why firms exist).	Source of competitive advantage internal to a firm; collection of assets (tangible and less tangible). Valuable, rare, imperfectly imitable, non-substitutable. Resources are considered quite static (Kraajienbrink, Spender, & Groen, 2010).	The role of managers in acquiring new resources for an organization is highlighted (e.g., through mergers and acquisitions), including obtaining resources from the outside and making them the organization's. Developed through finding new uses for existing resources and resource combinations.		Firm/organization
Dynamic capabilities view	Focus on capabilities rooted in a firm's managerial and organizational processes. Aims to create, coordinate, integrate, and reconfigure or transform a firm resource position. Considered identifiable and specific processes rather than tacit and idiosyncratic (Eisenhardt & Martin, 2000).	Occurs through developing the processes, such as absorptive capacity (focusing on identifying, assimilating, transforming, and using external knowledge).		Organization applies and absorbs resources. Resources are something the firm has and are looked at from the component level.
IMP	Focus on resources that are internal and external to the organization. Resources are needed to conduct activities and provide value in relationships: human, technical, financial, procurement, and marketing.	The structure within which a business operates is seen as interdependencies and relationships. The activities, resources, and participants evolve and are transformed through businesses among active participants (Ford, 2011).	(X)	Organizations, relationships, networks.

Approach	Definition of resources	Resource development	Fit for the study	The level at which resources are studied
Service-dominant logic	Resources are operand (tangible) or operant (intangible), market, private or public, internal or external to the actor). Function of human appraisal (anything actors can draw on for support). Inherently dynamic (actors obtain the knowledge and skills to convert latent or potential resources into actualized resources) → resources are not, they become. Resources are the skills, competencies, and knowledge (=service). They are a source of collaborative advantage; by developing this advantage, competitive advantage follows.	Occurs through actors innovating and discovering new ways of integrating resources and creating new ones (by applying skills and competencies); resourceness. Must occur in interaction since no actor has all the necessary resources to create value (which do not have to be owned to create value). Through integration, exchange, and collaboration between actors (=co-creation).	X	Can be that of an actor, organization, network, system, and nation Systems view of the role of resources in service exchange.

3.2 Resource co-creation – key concepts of service-dominant logic

3.2.1 Service and actors

Next, I will introduce the key concepts of S-D logic – service, actors, resources, and value (e.g., Vargo & Lusch, 2004; Lusch & Vargo, 2006) – before moving on to the empirical part of this study since they guide me in analyzing the individual studies and answering the RQs in following sections.

At the heart of S-D logic and its basis is the notion of service, which individuals, organizations, markets, and society are fundamentally concerned with. Service is the basis of all exchange, defined as integrating resources and applying competencies (specialized knowledge and skills) to benefit oneself and other actors (e.g., Vargo & Lusch, 2016).

S-D logic discusses service in singular rather than plural since service is not considered an output (an intangible product). Instead, service is a process (e.g., Vargo & Lusch, 2016). For B2B PSP, adopting the idea of service means a shift in

focus from designing service concepts, objectives, and pre-defined offerings more toward aiding, supporting, and enabling customers in their processes. The work of the professionals is then more about designing systems and platforms that permit and support customers and other actors in their resource integration and value co-creation processes in service exchange. In designing these systems and platforms, paying attention to social structures and forces facilitating resource development is essential (Edvardsson, Skålen, & Tronvoll, 2015). This does not mean developing service concepts that can be applied to several customers or productization is no longer important but that it is the expertise of professionals to see when more co-creative and iterative collaboration is called for and when pre-designed service concepts could be applied to meet a certain customer's need.

By defining service differently, S-D logic also redefines the role of the customer or client. The customer does not buy the services (intangible products) from the service provider but is an actor and active collaborator capable of combining skills, experiences, and knowledge in the co-creation process for the advantage of another actor and/or themself.

Adopting the word actor instead of the more usual way of defining the actors as service providers or customers stresses the common activities all actors do regarding value creation. Actors are, to some extent, service providers and service beneficiaries. However, this does not mean all actors are similar; rather, the idea is not to pre-define their roles when exploring service exchange (Lusch & Vargo, 2016; Koskela-Huotari & Vargo, 2019, 43). Actors are not viewed as separate, with some being active and others passive; all co-create value (Lusch & Vargo, 2016, 93). Therefore, the PSP needs to recognize the importance of varied skills and competencies, the aptitude to bring actors with varied experiences together, and steer the process, helping others use their skills and competencies.

It is also essential to understand the shifts and changes in the actor roles, allowing actors to participate, take center stage, or sometimes a more observant role, depending on their situations or resources available. Service is inherently co-creation, and if one wants to understand and study co-creation in more detail, one must understand and discuss the resources, mechanisms, and processes of resource integration.

3.2.2   Resources and their integration

S-D logic introduces a more nuanced view of resources, which has implications for B2B PSP. As discussed, service is about applying specialized skills and competencies to benefit oneself and others. This application is achieved via resource exchange, integration, and creation – a co-creation process. S-D logic invites embracing a broader view of resources and can offer professionals tools to seek new

ways to use resources and experiences and find novel combinations and applications. This type of imaginative and unconventional thinking entails that the environments, contexts, and their role in the collaboration are also understood and utilized. This calls for looking at the different layers of co-creation, institutions that affect co-creation, and concrete co-creation practices.

In S-D logic, value co-creation denotes the entire process during which the resources are integrated from several sources by multiple actors aiming to realize the benefit for the beneficiaries involved. In this process, the customer is always involved (McColl-Kennedy, 2019, 60). The term co-production has also been used to denote collaborative processes (McColl-Kennedy & Cheung, 2019). S-D logic initially used the concept of co-producer of value to refer to the customer's role (Vargo & Lusch, 2004). Later, the term was replaced with co-creator to highlight that the customer is always a co-creator of value (Lusch & Vargo, 2006; Vargo & Lusch, 2008b). Co-production is now defined as the customer's optional involvement in creating the value proposition (design, definition, production, etc.). Thus, it relates to co-creation and may even be a subset, although they are clearly two different things (Vargo & Lusch, 2016, 8). Value co-creation differs from co-production because it is multi-party, unavoidable, and broad-based (McColl-Kennedy & Cheung, 2019). This study uses the concept of co-creation, referring to the entire resource integration process.

Resource integration can occur in a dyad (e.g., between a professional service firm and the customer) or networks of multiple actors (Vargo & Lusch, 2008a; Vargo, Maglio, & Akaka, 2009). Second, value co-creation from the S-D logic perspective is viewed by adopting the bigger picture networked environment rather than exploring it in dyadic interactions between firms and customers (McColl-Kennedy, 2019). The understanding is that value is co-created in social systems. Individuals engaged in these systems can learn, adapt, choose, and base their decisions on perceptions of their socially constructed world (Giddens, 1984; McColl-Kennedy & Cheung, 2019).

Lusch and Vargo (2016) state that looking at networks is a manageable way to move from exploring the dyad (a relationship between two actors). Dyadic relationships still exist but are embedded in networks. S-D literature discusses using the term systems in addition to networks. The idea is that the term network can inform us about the connections and ties between actors but perhaps not so much about the flows and exchanges. The term system in S-D logic literature denotes the dynamic relationships and exchanges at the center of S-D logic, building a link to the bigger picture, environments, and contexts (e.g., Lusch & Vargo, 2016).

Institutions frame the context of co-creation; therefore, these two are inseparable. What makes co-creation a complex process is that a variety of resources is integrated, and this integration occurs in dynamic socio-cultural contexts. This is

why skillful orchestration is often called for (McColl-Kennedy, 2019). Why? First, S-D logic sees value as an experiential process outcome, not a property of output (Vargo & Lusch, 2017). The value creation process involves effort (Sweeney, Danaher, & McColl-Kenney, 2015) and is not a homogeneous process for each actor participating since not everyone co-creates value the same way, meaning each customer may choose or can engage themselves in the value creation process differently.

Institutions and institutional arrangements (norms, symbols, and other heuristics/rules) enable and constrain co-creation (Lusch & Vargo, 2016). These formalized rules and less-formalized norms define appropriate behavior and cultural beliefs and represent cognitive models that guide social action in relationships and networks (Scott, 2014, s. 46). The actors are simultaneously influenced/restricted by the institutional context and influence it themselves (Giddens, 1984). Value is thus co-created in that that it involves the activities of multiple actors and is reciprocally driven (Lusch & Vargo, 2016). S-D logic considers value creation as something uniquely interpreted through many vantage points. Unique resources can become available by integrating the resources of multiple actors. Mutually beneficial co-creation requires establishing and utilizing co-created, shared coordinating mechanisms (Vargo & Lusch, 2016).

The actors co-create, co-produce, and collaborate by ***developing social practices*** that contain rules, procedures, and methods for meaning-making and action. Not only do they help us understand how value is co-created but adopt a bigger view of how markets are created (Lusch & Vargo, 2016). In collaborating and co-creating with customers, the practices are formed as the resources of customers and service providers interlink with different contextual elements (Reckwitz, 2002). These social practices often developed over a long period. Through these practices, the actors can coordinate their meaning-making in service-for-service exchange for mutual gain (Lusch & Vargo, 2016). The discussion on practices in S-D logic originates from the practice theory, which explains how and when resource integration occurs (Echeverri & Skålen, 2011; McColl-Kennedy, Cheung, & Ferrier, 2015; Frow & Payne, 2019). Enacting these practices creates value for actors within networks (Korkman, Storbacka & Harald, 2010).

Practice is defined as a routinized behavior consisting of several interconnected elements: forms of bodily activities, mental activities, objects/things (and their use), and background knowledge (e.g., understanding, know-how, emotion, and motivation) (Reckwitz, 2002). Practices can thus be seen as ways of understanding, saying, and doing (Schau, Muñiz, & Arnould, 2009) and understood *"as activity patterns across actors that are infused with broader meaning and provide tools for ordering social life and activity"* (Loundsbury & Crumley, 2007, 995). Resource integration involving actors follows the value propositions and thus occurs when

value propositions attract actors to share their resources during collaborations and interactions in a specific context. This resource sharing takes place via co-creation practices (McColl-Kennedy, Vargo, Dagger, Sweeney, & van Kasteren, 2012; Frow et al., 2016). In S-D logic literature, practices have been studied from two perspectives: a practice approach has been used to capture value realization and on the other hand, interest has been on exploring how practices contribute to creating and maintaining markets and service systems (Kjellberg, Nenonen, & Thomé, 2019).

3.2.3   Value

Value is co-created and challenging to define and conceptualize (Grönroos & Voima, 2013) since it can be considered something that is (always) individually assessed (Holbrook, 1994 & 1999). This assessment can be done by looking at trade-offs between benefits and sacrifices (Day 1990; Woodruff & Gardial, 1996; Zeithaml, 1988) or means-ends models (Woodruff 1997; Zeithaml 1988). Value can also be defined more holistically with an experiential perspective that recognizes the value in the context of customer experiences (e.g., Heinonen & Strandvik, 2009; Helkkula et al., 2012), as part of extended social systems (Edvardsson et al., 2011; Epp & Price, 2011) or in the monetary gains mutually created by business partners (Grönroos & Helle 2010). The multidimensional definition of value sees it as complex and includes the dimensions of utility, function, emotional appeal, perceived benefits, and costs and acquisition (Boksberger & Melsen, 2011; McColl-Kenney & Cheung, 2019).

Clarifying whose perspective is adopted – the customer's or the service provider's – is important when defining value. It can be argued that a firm's purpose is to create and deliver customer value, co-worker value, social value, and shareholder value (Normann & Ramirez, 1994). Thus, focusing on customer value is important since it can be argued to be the basis for all other values. By creating value for the customer, the stakeholder and shareholder values can be realized (Khalifa, 2004).

More generally, increasing the customer's well-being creates value, making them better off (Grönroos, 2008; Nordin & Kowalkowski, 2011; Vargo et al., 2008). The discussion on value co-creation marks the shift from a firm-oriented to a more customer-oriented view on value and its creation, meaning customers can have an active role in value creation and are not just passive receivers of value (Normann & Ramirez, 1993).

The term value-in-context has been introduced to denote the different contexts where value creation occurs. This view advocates a broader view of value creation (seeing the bigger picture) and helps to understand networks where value creation occurs (McColl-Kennedy & Cheung, 2019). Chandler and Vargo (2011) define

networks as social structures in which service exchange between actors occurs in micro-, meso-, and macro-level contexts, meaning understanding what happens at one level without viewing it from another is impossible. Actors – firms, customers, or other stakeholders – are seen to have an agency, meaning they can influence their environment and not just be influenced by it (Lusch & Vargo, 2016). The idea is also that all actors in a network are resource-integrating and service-providing (applying their skills and knowledge) and are engaged in simultaneous exchange relationships, meaning none of the processes occur in isolation, the service beneficiary (customer) integrates the service offering with other resources (public, private, market resources), and determines the value during this process (Chandler & Vargo, 2011).

A customer value proposition as a core marketing construct is recognized in the literature as the firm's most crucial organizing principle (Webster, 2002). Payne, Frow, and Eggert (2017, 472) define it as *"a strategic tool facilitating communication of an organization's ability to share resources and offer a superior value package to targeted customers."* Thus, value proposition articulates the resource offering of one actor to another (Payne, Frow, & Eggert, 2017). Value propositions also summarize the core of a firm's marketing strategy decisions and signal implementation priorities to all actors in the organization (Eggert, Ulaga, Frow, & Payne, 2018).

From the conventional perspective, a value proposition means the marketing offer or value promise formulated and communicated by a seller for a buyer. Looking at value proposition from an S-D logic perspective introduces a shift from a unidirectional communication of value to developing reciprocal promises of value. S-D logic builds on the idea of co-creating value (seen as a process) and resource integration (seen as an outcome). Communicative interaction is central to this process, and the outcome emerges from that interaction (Ballantyne, Frow, Varey, & Payne, 2011). Value propositions can thus be seen as means through which actors interact, share knowledge, and shape mutual expectations regarding collaboration (Edvardsson, Tronvoll, & Gruber, 2011). The value proposition should also be a dynamic and adjusting mechanism for negotiating resource sharing within networks between different actors (Frow, McColl-Kennedy, Hilton, Davidson, Payne, & Brozovic, 2014; Wieland, Hartmann & Vargo, 2017).

As Ballantyne et al. (2011, 208) discuss, reciprocal value propositions are developed in dialogue, where the customer or service provider can invite the other actor to discuss mutual requirements and make a draft reciprocal proposition for a basis of discussion and adjustments. Thus, *"a statement of customer requirements emerges through a mutually creative co-constructed dialogue."* To communicate dialogically, the actors involved need to interact and learn together – to co-create the customer's voice (Jaworski & Kohli, 2006). Consequently, value propositions are proposals that move actors from passive to active players (Prahalad & Ramaswamy,

2004) and motivate them to engage in resource-sharing activities aimed at fulfilling their resource needs (Frow, McColl-Kennedy, & Payne, 2016). Naturally, developing value propositions in a dialogue requires varied expertise (knowledge and skills), and these areas of expertise, among others, are identified and explored in this study.

3.3   Theoretical framework of expertise and its development

This study's theoretical framework **Figure 4** binds the literature on PS and its view on knowledge and expertise with theoretical perspectives on expertise and the view on co-creation in networks provided by S-D logic. This framework describes how expertise and its development are seen in this study. The ideas are based on the insights from original studies and theoretical background.

The starting point of this theoretical framework is the understanding of expertise and different types of knowledge identified and discussed in the literature on PS (knowing-what, knowing-how, and personal knowledge). These different types of knowledge, with various skills, form the basis for expertise development, seen as a continuous and social process. Answering the RQ (i.e., What constitutes expertise in B2B services?) enables identifying special and differing knowledge and skills when focusing on co-creation among professionals, customers, and other stakeholders. These capabilities are required to conduct co-creation, especially focusing on the knowledge and skills needed for interaction (e.g., in facilitation). Expertise in this study is viewed as an ability to use resources. The focus is on operant resources (knowledge and various skills). Hence, the S-D logic's view on co-creation (resource integration, creation, and development during interaction among different actors) helps increase the understanding of expertise.

Answering the second RQ (i.e., How can professionals develop their expertise in inter-organizational networks?) focuses on capabilities that can be developed in co-creation with customers and other stakeholders. Thus, the answer helps to demonstrate how co-creation processes can form a platform for expertise development in B2B services. More specifically, through co-creation (e.g., Vargo & Lusch, 2004; Lusch & Vargo, 2006), expertise development is examined in this study.

Value propositions denote co-defining and deciding together why something is done. Considering value propositions as reciprocal – a co-developed understanding of potential value or benefit and articulated as an implied or explicit promise and expectation – helps to uncover what kind of knowledge and skills the professionals need to engage the customers and other stakeholders to craft value proposition together. It can be argued that professionals need various types of knowledge and

experiences in value proposition creation. The analysis will identify these knowledge and skills in more detail.

Co-creation practices denote what the actors do concretely during collaboration when integrating resources; these practices consist of activities in facilitated social interaction, suggesting that particularly, practical knowledge (knowing-how) – but theoretical and personal knowledge too – are needed when professionals facilitate interaction. The institutions consist of rules, norms, and symbols and act as coordinating mechanisms enabling and constraining co-creation. People conform to institutions and institutions coordinate their actions, but people can (to some extent) also create and change these coordination mechanisms. When people (actors) come together from different industries and backgrounds, the institutions guiding their actions may also differ. Looking at institutions will help to understand what kind of knowledge and skills are needed so that the rules for people working together can be decided. The institutions are seen to affect the use and development of all types of knowledge (enabling and restricting). However, since institutions are humanly devised, they can be at least partly changed and developed; in this process, the professionals need theoretical, practical, and personal knowledge.

This framework helps identify what expertise consists of in B2B services focusing on co-creation and how expertise can develop during co-creation. When professionals collaborate with their customers and other stakeholders, the skills and different types of knowledge areas can develop as a sort of byproduct of collaboration because of the characteristics of the co-creation process in that it is about resource sharing, integration, and development between different actors. This study's findings section details these insights.
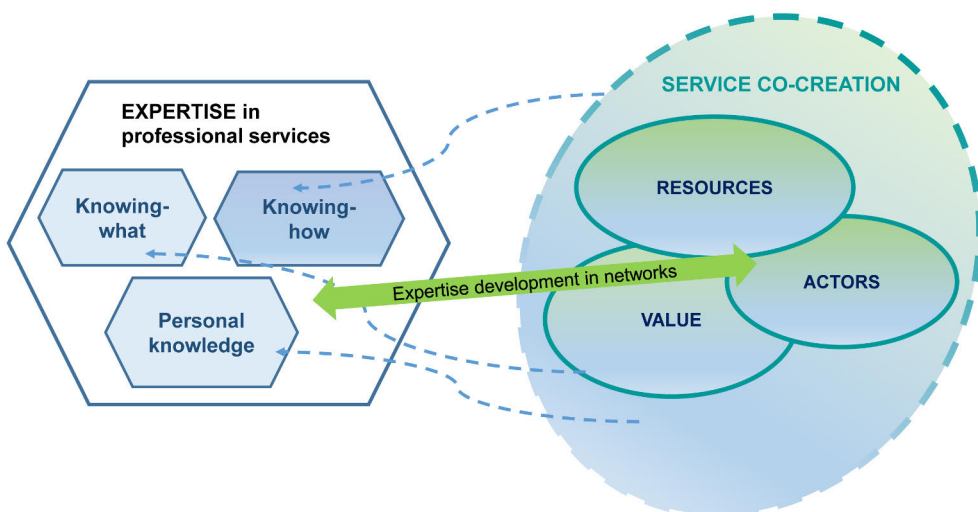
Figure 4. The theoretical frameworks of the study.

4 Methodology

4.1 Social construction as a philosophical orientation for the study

Behind all research are philosophical assumptions. Thus, the research always reflects a particular way of looking at the world (ontological assumptions) and has a certain orientation that dictates legitimate ways of establishing valid claims to knowledge (epistemological assumptions), all of which will influence the methodology used (Hunt & Hansen, 2011; Armstrong, Boyle, Heron, Locke, & Smith, 2019).

This study builds on social construction (the notion that reality is socially constructed and can best be understood by exploring the tacit [i.e., experience-based] knowledge of individuals) (Armstrong et al., 2019, 46–47). Stake (1995, 100) explains the social constructivist position: "No aspects of knowledge are purely of the external world, devoid of human construction." Thus, the possibility of objectivity stressed in positivist research is questioned (Hudson & Ozanne, 1988). This questioning stems from the fact that the researcher is not considered someone separate from the world but an active participant. Also, researchers can only view phenomena through their subjective history, life experiences, and academic socialization (e.g., Markin, 1970; Maclaran et al., 2011).

Thus, social constructionists (or interpretive researchers) stress the emergent nature of research. Not only do the research findings emerge, but the research design can be modified and changed due to initial exploratory excursions into the field (empiria). Moreover, research does not have to be directed toward producing nomothetic generalizations because the very nature of interpretive research is time- and context-specific (Hudson & Ozanne, 1988, 513). Developing the theory is not the only important aspect; building an understanding of the context and phenomena is also important (Dyer & Wilkins, 1991). "*Whatever else may be said about the postmodernist turn in contemporary studies of society and culture, its critique of assumptions about the objectivity of science and its presumed authoritative voice has raised issues that all qualitative researchers need to address.*"

There is criticism toward the objective standards of scholarship; now, raising the question of whether "*observational objectivity is either desirable or feasible as a goal*" is possible (Angrosino & Mays de Pérez, 2000, 674).

4.2 Ethnographic case study as a research approach

Ethnography is "the description and interpretation of a culture or social group" (Holloway, Brow, & Shipway, 2010, 76). Ethnographic research aims to analyze cultural processes and the different meanings actors give them to make the stories of ordinary people visible (Atkinson, Coffey, Delamont, Lofland, & Lofland, 2001). Tedlock (2002, 455) describes ethnography as involving "an ongoing attempt to place specific encounters, events, and understandings into a fuller, more meaningful context. It is not simply producing new information or research data but how such information or data are transformed into a written or visual form," meaning research design, fieldwork, and methods are combined to yield descriptions, interpretations, and representations of human lives that are historically, politically, and personally situated. The key assumption in using ethnography is that a better understanding of people's beliefs, motivations, and behaviors can be obtained through close and lengthy interaction with them (Tedlock, 2002; Ó Rian, 2009). Methods such as observation and field notes are often used to collect situated and nuanced data. In doing that, the ethnographers search for patterns of behavior (e.g., rituals or social behaviors) and how the ideas and beliefs of people are expressed through language, material activities, and actions (Creswell & Poth, 2018).

The reasoning behind choosing a qualitative approach and conducting a case study is focusing on the topic calling for an openness to explore, studying things in their natural settings, and attempting to make sense of and interpret phenomena regarding the meanings people bring them (Denzin & Lincoln, 2000; Eriksson & Kovalainen, 2008). Accordingly, a case study is a research strategy that scrutinizes a certain phenomenon in its naturalistic context and uses multiple data sources. The idea is to confront the theory with insights from the empirical world (Ragin, 1992; Piekkari, Welch, & Paavilainen, 2009). The aim can be to identify constructs for later theory testing or find an explanation of how processes and causes fit together in each case (Ragin, 1992).

This research is abductive because there is a relationship between empiria and theory. This relationship can be understood through abduction, which Dubois and Gadde (2002) refer to as systematic combining and discuss the intertwined research process enabled by case research (non-linear). Systematic combining is about the continuous interplay between theory and observation, where surprising or new insights from empiria mean theory development through generating new concepts and developing theoretical models is possible. Thus, the empirical world is explored, destabilized, and reconstructed (Dubois & Gadde, 2002).

Taking a pragmatic approach to research design means that clear understanding of the goals and outcomes for the project determines the decisions about the research design. Consequently, understanding why the research is conducted is crucial to

answering questions about how to do the research (Morgan, Fellows, & Guevara, 2010, 189). When conducting a case study adopting this approach, the case selection is not guided by the theory; rather, finding cases that provide opportunities for learning and extending one's understanding as a researcher is important (Stake, 1995; Piekkari & Welch, 2017). The casing process – deciding what the case in one's research is – is important (Ragin, 1992). A case can be an instance, incident, or unit of something; it can be anything: a person, organization, event, decision, action, or location. The case can be found at the micro-, meso-, or macro-level and an empirical unit or theoretical construct. Possibly, *"what the research or case object is a case of may not be known until most of the empirical research is completed"* (Schwandt & Gates, 2018, 341).

The richness and contextualization of the case study are a source of theoretical insight (Stake, 1995; Platt, 1992). As Dyer and Wilkins (1991) stress, it is not about how long one writes, the number of cases, or even how long is spent in the field collecting the data. The researcher must be able to comprehend and describe the research context and its social dynamics, make it understandable to readers, and *"generate theory in relationship to that context"* (Dyer & Wilkins, 1991, 616).

In essence, ethnographic case studies are *"employing ethnographic methods and focused on building arguments about cultural, group, or community formation or examining other sociocultural phenomena"* (Schwandt & Gates, 2018, p. 344). A characteristic for them is prolonged observations over time in a natural setting within a bounded system and the description of a culture-sharing group (the context where the human experience occurs) (Angers & Machtmes, 2005). The observational method is chosen to understand another culture, while the case study contributes to the knowledge of individual, group, organizational, social, political, and related phenomena (Yin, 2009). The context in which human experience occurs must be naturally occurring and not artificial (Ary, Jacobs, & Razavieh, 1996).

Consequently, being where the stories are conducted is important. The difference can be made between the stories people tell and noticing, cataloging, and analyzing the corpus of narratives for similarities and differences. The idea is that the stories people tell are not only articulations of experience within but can be seen as windows to distinctive social worlds. Thus, *"narratives have different or similar formats and, in turn, that different formats relate to what is told, to how and where narratives take place, and how they are understood"* (Gubrium & Holstein, 2008, 241). The settings where the stories are constructed are an integral part of narrativity – the social context where the stories are told. The term narrative practice (asking what, how, where, and when) is used to *"encompass the content of accounts and their internal organization, as well as the communicative conditions and resources surrounding how narratives are assembled, conveyed, and received in everyday life"* (Gubrium & Holstein, 2008, 247).

In this study, the ideas and research traditions of ethnography have guided the research process. One could describe this research as a case study informed and flavored with ethnography. In all the individual studies, the research data has been collected by observing actors, immersing oneself into the process, and being present where the actors co-create. The data for Studies 1 and 2 is longitudinal and consists of video-recorded material, field notes, and non-participant observation. In Study 1 narrative ethnography is the chosen method. In other studies, the idea has been to understand the contextual, situational, and social aspects of co-creation, thus defining and illustrating the spaces, discussions and activities is highlighted. Therefore, the ethnographic tradition and approach are in each study since the findings were presented by giving the actors a voice and endeavoring to give the reader a sense of being there via narratives and examples and portraying the contexts of co-creation.

4.3 Research data and methods of original studies

This thesis includes three original studies or research papers. In the studies, various research methods and data were applied. In Study 1, narrative ethnography was chosen to demonstrate the development of a co-creative executive learning community and conceptualize it via empirical data. Study 2 is a qualitative case study focusing especially on facilitation in a business coaching context and introduces a co-creative facilitation framework. Study 3 adopts a strategy-as-practice approach, as it focuses on co-creation of strategy via strategy dialogue between independent consultants in a partnership. **Table 4** presents the objectives of the original studies with the methods and data. Chapter 5 will introduce the methods of the original studies in more detail, with findings and implications. Each study's role in contributing to this study's overall objective will also be discussed.

Table 4. Objectives, data, and methods used in original studies.

	Objective of the study	Data used in the study	The method of the study
Study 1 *Developing an executive learning community: focus on collective creation*	To propose a co-creative executive learning community as a novel model for organizing executive education by conceptualizing a co-creative executive learning community and, via empirical study, demonstrating how it can be developed.	The video-recorded data from three 36-hour learning camps (22 hours). Two researchers took field notes while observing the learning camps.	Narrative ethnography
Study 2 *Facilitation activities and their role in supporting co-creation in a professional service context*	To answer the following research question (i.e., What are the key facilitation activities in the multi-actor context?) and introduce a co-creative facilitation framework for business coaching.	Group interviews were conducted in the five participating companies (20), interviews of the business coaches, field notes, and video-recorded data from learning camps (22 hours).	Qualitative case study
Study 3 *Co-creating strategy between independent consultants in a micro-firm context*	To present concrete examples of co-creating, extend the concept to co-creation, and explore the question: How is strategy constructed in a dialogue between independent consultants in a partnership?	Data was collected from two 3-hour workshops, recorded discussions, and field notes, plus additional material.	Case study with strategy-as-practice approach

Table 5 presents the timeline for each study. This research took a while since the data was collected while working on research projects; I have been data gathering with other project team members. The writing process of the research papers has been parallel due to several revisions of manuscripts preceding their final form. The table depicts the timeline for developing the original studies and outlines the most important academic forums where the manuscripts and final versions of the independent research papers were introduced. I have presented each study in conferences, research seminars, and workshops and received reviews from senior and experienced researchers while writing each paper.

Table 5. Development of the original studies.

Title	Developing an executive learning community: focus on collective creation	Facilitation activities and their role in supporting co-creation in a professional service context	Co-creating strategy between independent consultants in a micro firm context
Earlier version(s)	First version presented in RENT XXX - (Research in Entrepreneurship and Small Business) Conference in Belgium, November (11/2016).	First version presented at the IMP-34th Annual Industrial Marketing & Purchasing Conference, France (9/2018). Revised manuscript presented at Nordic workshop on inter-organizational research, Sweden (4/2019).	First version presented at the RENT XXIX – (Research in Entrepreneurship and Small Business) Conference in Croatia (11/2015).
Final version	Published in Academy of Management Learning & Education (2021). 20(4): 514–538 https://doi.org/10.5465/amle.2018.0338 (Online: 4 May 2020).	To be submitted to a journal in the spring of 2024.	Published in The Dynamics of Entrepreneurial Contexts, Frontiers in European Entrepreneurship Research, Edward Elgar Publishing, in association with The ECSB (2018). ISBN: 978 1 78811 0983.

4.4   Data analysis methods

For Study 1, the chosen method was ethnography since we saw this method would allow us to build an understanding of the learning camps, unlike the more traditional approach (e.g., interviews). The idea was to observe the interaction between people and their environment to understand their culture (Eriksson & Kovalainen, 2008). The insights from narrative ethnography and narrative research helped us provide

readers with the experience of being there, take them to the learning camps, and describe the context in detail (Gubrium & Holstein, 2008; Dyer & Wilkins, 1991).

The data for Study 1 was derived from the three learning camps, each lasting 1.5 days. All three camps generated approximately 22 hours of video material. I had the privilege to be in each camp as a non-participant observer, enabling me to take field notes, make observations, and see the actions and discussions. In addition, being there allowed the participants' feedback and reflections to be heard through the facilitating business coaches. An integral part of the analysis was data workshops between facilitators and researchers to discuss the observations and ideas related to the camps.

Study 1's data analysis process involved an iteration between relevant literature about learning communities, executive education, improvisation, empirical data, watching the video-recorded data, making sense of it, and analyzing it in depth. Thus, the analysis project followed abductive logic (Mantere & Ketokivi, 2013). The interpretative reasoning focused on how the participants engaged with the learning camps and collaborated in producing knowledge and insights into the topics discussed (Coffey & Atkinson, 1996). The video-recorded data enabled looking back at precise interactions during the learning camps. Comparing the video-recorded data field notes, in which comments, details of interactions, and initial findings were listed, permitted focusing more closely on social situations, units of interaction, and their interrelationships (Flewitt, 2006; Knoblauch, 2012). During this process, a coding scheme was developed, video recordings were rewatched, and field notes were read; coding generated a description of the setting and the categories for the analysis (Creswell, 2009). The data was coded by analyzing the people involved, examining what they were doing and how they related to working together, assessing what kinds of knowledge they shared, and identifying the materials and spaces and how they were used (Eriksson & Kovalainen, 2008). The initial codes then focused on the interactions among the facilitator, participants, and setting. The literature helped identify and analyze the elements that supported or restricted the development of the learning community in the learning camps.

Following the ethnographic research approach, the study's findings were presented as narrative episodes illustrating units of action and interaction (Eriksson, Henttonen, & Meriläinen, 2008) during each of the three learning camps, including quotations and comments by the learning camps' participants; thus, rich descriptions could be provided. These descriptions revealed the dynamics of the phenomena in question and can thus help others identify similar dynamics in their research or daily lives (Dyer & Wilkins, 1991).

Data for Study 2 came also from the process of developing learning camps. In addition to video recordings of three learning camps, the data included one transcribed group interview from each participating company before the first camp,

non-participant observation, field notes taken during the camps, and recorded and transcribed interview of two business coaches facilitating the learning camps. An interview was conducted after the third camp. Study 2's chosen method was a qualitative case study (Piekkari, Welch, & Paavilainen, 2009) since developing and executing learning camps was a longitudinal, intensive, and definite process engaging coachees from five companies. Following the process helped us paint a rich picture of facilitation activities in business coaching, affording unique opportunities for building an understanding of an underlying social reality (Dubois & Gadde, 2002).

The study's data analysis process aligned with moderate constructionism, where abduction and induction play a role during the research process. The method choice permits researchers to access prior theory and new knowledge generation via a dialogue between theory and empirics while studying the process in a real-life context (Järvensivu & Törnroos, 2010). This dialogue means the literature and theoretical background (of value co-creation, coaching, and facilitation) provided an initial understanding, but there was room to immerse ourselves in the data. In the analysis process, the processes introduced by Corley and Gioia (2004) and Gioia, Corley, and Hamilton (2012) were followed.

The open coding of the data was done in the first stage. More precisely, the data analysis began by reading the interview transcripts of focus group interviews, identifying the challenges and change processes in the organizations where the coachees came from. The patterns of objects, expectations, and ideas for learning camps were also examined. We especially focused on what the facilitators did to initiate the coaching process. After that, it was time to watch the videos and write down initial extracts and patterns, in addition to those from focus group interview data, by clustering the data regarding the extracts related to what facilitators and coachees do, the resources identified, tools and materials used, and the themes discussed. Immersing ourselves in video data also revealed what kind of changes were made during the process regarding the tools, methods, and facilitating the group work and, of course, how the participants responded (Knoblauch, 2012). These initial codings were then discussed, compared and contrasted, and complimented with field notes with intuitive impressions and first-hand observations during the learning camps to decide on first-order themes.

The second-order concepts, activities, stemmed from returning to the video material and then reflecting on and discussing the clustering. In this second phase, the transcribed interview of the business coaches was also analyzed to identify instances where the reflections and experiences of coaches corroborated or contrasted our first-order insights. Comparing the experiences and insights provided by the business coaches and the initial findings drawn from the video data and field notes was a source for triangulation. The second-order themes were further discussed

and reflected on to decide on the aggregate themes, the key facilitation activities (e.g., Corley & Gioia, 2004). Tables present the results where the reader can see the first- and second-order themes and the aggregate dimensions, which are also discussed with examples and quotations from coachees and business coaches.

The chosen method for Study 3 was a practice-based view (Orlikowski, 2010), and, more precisely, a strategy-as-practice, since the focus was on the co-creation between partners in a micro firm context and, more precisely, on strategy as constructed in a dialogue between independent consultants in a partnership. Strategy-as-practice enables an in-depth analysis of what occurs in activities dealing with strategies within organizations because strategy is not just considered property of an organization but something people do with others from within and outside the organization (Whittington, 2006).

Study 3 focuses on the micro-level interaction between individual practitioners in strategizing (Jarzabkowski & Spee, 2009). The data for the study comes from two workshops organized for two PSFs who wanted to work on their strategies. The contention was that workshops as a mode of doing strategy can be considered practices. These practices represent "concentrated episodes in the wider strategy praxis, a sort of episodic strategy practices" (Jarzabkowski & Spee, 2009, 83). The study took on a relational constructionist view (Fletcher, 2006), which entails that constructing a joint strategy is seen as a relational activity where, in dialogical episodes, actors' resources, experiences, understandings, and interests are interwoven in a dialogue through which strategy emerges. Reality is considered socially constructed based on the participants' previous understandings, experiences, and personalities (Bouwen & Steyaert, 1990; Fletcher, 2006). The literature on co-creation, social construction, and dialogue formed the study's conceptual framework and guided the analysis. The data from the two workshops were analyzed by searching for the themes through which the participants co-constructed strategy (i.e., what they discussed). The differences and similarities in the data concerning the phenomena (strategy co-creation through dialogue) were analyzed, and text segments were coded with similar features under the same category (Miles & Huberman, 1994). Those categories included referring to one's background and expertise, discussing the customer, reflecting who we are and what we do (the participants), and discussing the required steps during the strategy formulation process. The text segments in each category were then checked and analyzed further, which aided in conceptualizing the results and increased the abstraction level (Coffey & Atkinson, 1996).

The results were in a table form, where each practice was presented with examples and quotations to give the reader an understanding and picture of what the dialogue was like through which the professionals negotiated and constructed the strategy.

For this synthesis part of the study, I re-read the findings of original studies and examined them by taking the theoretical background as a starting point. The background enables understanding the role of expert knowledge as the key resource of the individual professional and, ultimately, of the PSF: the fact- and experience-based knowledge, and personal knowledge (e.g., Løwendahl, 2001). Each original article was analyzed with the dissertation's overall RQs in mind to present the findings, utilizing the theoretical framework in Figure 4. The RQs in this study answered the following: *What constitutes expertise in business-to-business professional services* (RQ1)? and *How can professionals develop their expertise in inter-organizational networks* (RQ2)?

First, I analyzed the studies for insights of expertise (RQ1). At first reading, I marked all the instances where I identified professionals using their expertise and what theirs was. Next, I collected all these instances into a table; then, I began organizing the areas of expertise by utilizing the classification from the literature of professional service as a guideline: fact-based, expertise-based, and personal knowledge. The findings follow Corley and Gioia's (2004) guidelines by presenting the first-order themes, identifying the second-order concepts, and finally introducing the aggregate dimensions. These are the areas of expertise identified when resources and knowledge are examined in the context and perspective of networks.

Chapter 6.2 will present the findings focusing on expertise development in co-creation-based networks, derived from the original studies. The process of analyzing the studies for expertise development (RQ2) was similar. However, I took the areas of expertise described as a starting point; while reading my studies, I identified the instances, areas, methods, and situations that provide a possibility for expertise development and serve as a platform for developing expert knowledge and skills. Expertise development in service co-creation is discussed using the key concepts of S-D logic: resources, actors, and value. Finally, Chapter 6.3 will present the co-creation framework of expertise development. I summarized the findings in the tables, where the first-order themes, second-order concepts, and aggregate dimensions are presented and then discussed in detail.

5 Summaries of the Original Studies

5.1 Developing an Executive Learning Community: Focus on Collective Creation

The literature on executive education has focused especially on addressing relevance and resource constraints, developing participants' capacity to become reflexive practitioners, and enabling long-lasting change in organizations. However, it can be argued that new types of innovations and formats for executive education are called for – ones that would engage participants in designing and delivering the program and assuming responsibility for their own learning. These types of formats could increase the potential for creating long-lasting and meaningful value for participants. In addition, executive education targeting professionals engaged in managing organizations remains an under-researched area. There is more research on management education research, primarily investigating programs for management students. However, differences exist between management and executive education (related to program purpose, student characteristics, and class dynamics); thus, the results of management education studies do not necessarily apply to executive education.

The study builds on the literature on learning and, more precisely, on learning communities by emphasizing the importance of a community in contributing to learning by identifying relevant themes and encouraging engagement. When people come together, the collective creation of value occurs through co-operation (interaction and sharing of ideas) between community members, and the resources are mobilized. Thus, collective creation contributes to achieving the group's objectives (e.g., Bridoux, Coeurderoy, & Durand, 2011). In addition, the idea of improvisation is incorporated, and the study demonstrates how improvisational theatre activities can strengthen collective creation, thus contributing to developing a learning community in executive education. This empirical study develops a framework for executive learning communities. The learning community model for executive education presented can replace or supplement traditional executive education programs by augmenting traditional content delivery with continued and assured learning experiences.

This study is a narrative ethnography, closely scrutinizing social situations, actors in those situations, and actions about narratives. Through narratives, providing the readers with a sense of "being there" is possible. For the study, a process of developing a series of learning camps (three camps each lasting 1.5 days) for management groups from five firms operating in various industries was followed longitudinally. Research data consists of video-recorded material and field notes written while observing the learning camps.

The data was analyzed by identifying improvisational theater activities to answer the RQ of how to facilitate collective creation and develop an executive learning community in executive education (Allen, 2013). The activities are divided into **means** (different structures, places, and tools to initiate the process from within the participant context), **materials** (different resources, e.g., ideas and emotions to support the inquiry cycle), **and modes of engagement** (ways of orientation to the community and collective activity, participation, and interaction). Through these activities, collective creation is facilitated: *co-operating, interacting, sharing ideas in the community, and mobilizing resources for the community's benefit*. The results demonstrate that collective creation fosters learning and community development. Also, positively strengthening the community influences collective creation. For instance, creating a strong sense of trust in the community helps members open up and offer more of their resources to other members. As a managerial implication, applying the framework developed to the executive education context permits a focus on the social and collective nature of executive education and provides practical implications of how these can be enhanced.

This research shows, via examples and narratives, how actors in networks co-create. It describes and provides insights into co-creation between the managers participating in the learning camps and between the participants and professionals facilitating the learning camps. The context of the study is a network of five companies, a business development organization, and their respective professionals and research organizations. These actors form a network that develops into a temporal learning community. The community forms a social structure for learning, and the results show how to achieve this. This insight aligns with the RQs of my study, as study's results demonstrate how and what kind of expert knowledge the professional has and uses in facilitating the process. What is most highlighted is the idea of time – taking the time to learn, supporting the feeling of having time and not being busy, creating an atmosphere and space to focus on the important themes to discuss, relinquishing the idea, and feeling that it is not just about sharing or creating knowledge. Learning and development are equally about creating meaning – social and individual – and realizing it's a process and understanding how a group can achieve this.

5.2 Facilitation activities and their role in supporting co-creation in a professional service context

This study's starting point is the enduring discussion of knowledge creation, transfer, and management, which is the focus in a professional service context. The study focuses on business coaching – a professional service that can be defined as a process that aims to equip participants with the tools, knowledge, and opportunities they need to develop themselves and become more effective (in their work) (Peterson & Hicks, 1996, 41), thus aiming at professional development (Blackman et al., 2016; Athanasopoulou & Dopson, 2018). The literature discusses the knowledge and expertise needed to steer the coaching process and the skills the coaches apply to meet the needs of the participating individuals and the organizations they represent. This study focuses on group coaching, and the connection is built between coaching and facilitation since facilitation is an essential part of coaching, focusing on the process and describing or showing how something is done. As Peterson and Hicks write (1996), coaching is a joint process involving the coach undertaking the facilitator role.

This empirical and qualitative case study focuses on facilitators and facilitation activities that are identified and analyzed, answering the following RQ: What are the key facilitation activities in a multi-actor context? The context being multi-actor means the study scrutinizes a business coaching intervention where the participants (13) come from five companies operating in different industries. The data comes from planning and organizing a series of three workshops (learning camps), each lasting 1.5 days. The data consists of video-recorded material and field notes made during observation. Also, group interviews (with members of the steering group) were conducted in each company before the first workshop and between workshops. The data also includes an interview with the two business coaches facilitating the series.

In Study 3, key facilitation practices and eight sub-activities in the context of group coaching were identified. The key activities are *creating the space for resource integration*, *(that the actors have)*, and *enabling knowledge creation, integration, and exchange*. Facilitation activities are scrutinized by utilizing the literature on co-creation within the S-D logic approach. The study defines co-creation as a process of knowledge sharing, integration, and new knowledge creation, which occurs via direct and indirect interaction in a joint sphere for collaboration among multiple actors (Grönroos & Voima, 2013; Mitleton-Kelly, 2011; Payne et al., 2008). Developing coaching that builds on the group's expertise and knowledge is intended to leverage the knowledge of the group. We propose that focusing on extant resources and encouraging the recognition of potential resources while supporting access to such resources can benefit each coachee's development.

The study suggests that the type of intervention introduced can help participants with resource integration, and thus can deliver desired learning outcomes. A coach's role is primarily that of a facilitator, and facilitation is crucial. In addition, this study also contributes to the literature on business coaching by providing a co-creative facilitation framework for understanding group coaching interventions from the perspective of S-D logic and co-creation (e.g., Vargo & Lusch, 2004) that augments and complements existing models of business coaching. The insights of this study bring forth the expertise of professionals, especially facilitation, enabling, and making things easy for coachees while challenging them. The professionals use facilitation to introduce the idea of collective capability or togetherness, which enables seeking and finding answers via collaboration. Through supporting differences and tolerating an individual creation of meaning, success can be found. Learning is supported when coachees develop their ability to see the world differently and give unexpected ideas or examples a chance.

5.3 Co-creating strategy between independent consultants in a micro-firm context

This study's starting point is discussing strategy, value co-creation, and how and with whom the value is created. In the context of PS and consultancy, success in value co-creation entails that ideas from the partners and customers, as well as the ideas and resources from suppliers and other stakeholders, must be incorporated when developing a firm strategy. Although the literature on co-creation is vast, the research has focused extensively on marketing-related themes and questions. This study suggests the concept can be extended to other contexts – in this case, the co-creation of strategy. Focusing on strategy work among partners offers new and fascinating perspectives on strategizing in micro and small firms. Also, although the literature has focused on client-consultant interaction in PS, focusing more on co-creation to increase the understanding regarding integrating resources (e.g., knowledge and expertise during co-creation) is still needed.

The context of this qualitative empirical study is PS; the data comes from two PSFs (micro firms) and, more precisely, two co-creation workshops, with one workshop organized per firm. The focus is on the relationship between independent consultants (who are also partner entrepreneurs) collaborating. During the workshops, the partner entrepreneurs envision the future of their firms and discuss their strategies. The workshop discussions were recorded and transcribed; field notes from both workshops were also recorded.

The objective was to study how the actors co-strategize; thus, the approach adopted in this study is strategy-as-practice – which sees organizations as being constituted by shared practices – and that actors draw on to act and interpret other

actors' actions. Practices can be defined as accepted ways of doing things; they are materially mediated and embodied, shared between actors, and routinized over time (e.g., Gherardi, 2011). The strategy in this study is seen as something that is continuously developed, produced, and negotiated in everyday activities; strategy is not the property of an organization but something people do (Whittington, 2006). Consequently, this study adopts a relational constructionist view (Fletcher, 2006) where the actors' resources, experiences, understandings, and interests are entwined in a dialogue; through this dialogue, the strategy emerges.

This empirical study identifies five dialoguing practices from which the partners draw during strategizing: 1) *dialoguing about the customer*, 2) *dialoguing who we are and what we do*, 3) *dialoguing the utilization of a range of varied experience and knowledge in customer co-operation*, 4) *dialoguing the required steps regarding the future*, and 5) *dialoguing the need for customer perspective*. Integrating varied expertise, expectations, and interests is essential in this kind of strategy work, and the findings indicate that co-strategizing in micro firms is iterative and ongoing process and entails that time and space are found to do it amid business as usual.

Concerning the research questions of my dissertation, this study's findings provide insights into both questions and highlight the broad range of expertise and expert knowledge the professionals need. First, the findings focus on a more strategic, broader, and future-oriented look at the business and services. Strategy is a continuous process incorporating experiences, information, and insight from partners, customers, and others. Thus, professionals need to stay open and attentive to pick up signals that may help them develop their business for the future. Second, professionals highlight that the strategy needs to be implemented and put to work by deciding on concrete steps and determining responsibilities, emphasizing the resources that can be drawn from in strategy work.

6 Summary of Findings

6.1 Expertise in business-to-business professional services

The literature of PS and the typology of different types of knowledge discussed in the literature have guided my analysis of the results. Thus, I will present three categories or areas of expertise: knowledge-based, practice-based, and emotional and situational. In piecing these categories together, I was guided by the key concepts of S-D logic and developed an understanding of them: service, resources, actors, and value. These concepts are instruments in constructing a sense of applying specialized skills and knowledge; that is what co-creation is about. Taking these concepts up a notch to a more abstract level is what I will do in this chapter, starting by looking at the individual studies and what the professionals do when they co-create with customers and other collaborators.

First, I will present the categories of expertise in PS. Knowledge-based expertise, which I will describe first, is theoretical, can be accumulated via education, and having knowledge of the theories of learning. Practice-based knowledge is more practical and about applying theoretical knowledge in various situations, projects, and processes; it denotes the expertise (know-how and skills) acquired and accumulated via experience. Emotional and situational expertise focuses more on soft skills and interaction, thus denoting how experts can steer and facilitate it to have a sense of other actors and situations to encourage and enable co-creation. Finally, I will introduce a fourth category of expertise essential in a co-creation context: a co-creation mindset.

I argue that adopting a co-creation mindset enables a professional to fully utilize their expertise when collaborating with the customers, meaning understanding the bigger picture while considering the institutions, rules, organizational expertise, experience, and culture, along with understanding their role in value co-creation. The term mindset refers to a different and more comprehensive way of viewing collaboration and resource integration, creation, and exchange. Co-creation mindset signifies a shift in thinking, where collaboration is seen to take place with equal actors and is less about defining the set goals and more about the process.

6.1.1 Knowledge-based expertise

Theoretical knowledge or knowing what denotes knowledge and expertise is considered universal, formal, and explicit; it can be explicated in books and lectures and is acquired via education (e.g., Tynjälä 2008). It represents the knowledge of something – a theoretical understanding of business, industries, concepts, and service. Knowledge-based expertise enables PSPs to develop their own business and is about acquiring and having knowledge about markets, development, and knowledge creation, permitting them to aid their customer in developing and growing their business. **Table 6** presents the insights from original studies with second-order concepts and aggregate dimensions. I will discuss some of the results via examples next.

Table 6. Knowledge-based expertise.

Insights from original studies – first-order themes	Second-order concepts	Aggregate dimension
• **Having knowledge of one's company and a partner's expertise** (Study 3) • **Knowing what others are good at** (Study 3) • **Understanding resources and their connections and synergy** (Studies 1, 2, 3)	Understanding (existing) resources	Knowledge-based expertise
• **Understanding and having knowledge of strategy and strategy work** (Study 3) • **Knowing partners and collaborators and building partnerships** (Study 3) • **Having knowledge of the business environment** (Studies 1, 2, 3) • **Having project knowledge: developing new services, concepts, and interventions** (Studies 2, 3)	Understanding business development	
• **Having (in-depth) customer knowledge** (Studies 1, 2) • **Understanding change (in the business environment, customers' environment, and customer organizations)** (Studies 1, 2, 3) • **Forecasting** (Study 3)	Understanding the customer	
• **Productizing** (Studies 1, 2) • **Marketing communication** (Studies 1, 2) • **Understanding the use of customer stories and stories of the company** (Study 1)	Having marketing knowledge	
• **Having knowledge of group dynamics** (Studies 2, 3) • **Having knowledge of institutions (norms, rules, norms, symbols, different organizational cultures) and contexts** (Studies 2, 3) • **Having knowledge of creating and maintaining the atmosphere for resource integration** (Study 3) • **Enabling access to resources** (Studies 1, 2, 3)	Having knowledge of co-development and learning (facilitation)	

Understanding (existing) resources is especially emphasized in Study 3, focusing on strategy work and strategy dialogue, thus focusing on the firm's resource base.

The dialoguing practices identified stress the importance of knowing who we are, what we can do, whom we know, and what we want to do. Discussing resources is an interplay between what the customers are known to expect from a PSP and what the firm can do with existing resources, but, perhaps more importantly, what one would like to do. One of the partners of a consultancy group noted that instead of trying to strategize from the inside out, starting from the outside and identifying the role that would fit the experience and interests (of the professionals) would be preferable: "So we could also think and ideate what we would like the world to be in five years rather than thinking what we would like our firm to be like. And that challenges us to think what our role might be to help to create the world we have envisioned." That is why it is important to understand what one is good at and equally importantly, know their partners and their strengths, backgrounds, and resources to make connections and find synergy in service development and provision. It also means knowing the collaborators and realizing all the expertise and resources need not be in-house; some resources can be cleverly attained via networking and utilizing resources and by developing new resource combinations. Understanding the existing resources as a basis for strategy work helps us see what kind of knowledge, skills, and competencies are needed in the future.

Understanding business development entails having an understanding and knowledge strategy and strategy work, knowing partners and collaborators, building partnerships, and having a knowledge of the business environment. For PSP to enable customers' development and value creation, having knowledge and understanding regarding methods, processes, and platforms for business development is essential; it is also about knowing what types of methods or interventions the businesses find useful and providing long-lasting change or benefits. Study 1 focused on developing new interventions in executive education that would build on peer learning, exchange of practical ideas and experiences, and provide participants with concrete tools and methods to utilize in their respective organizations. Although the development process was interesting, examining what happened before was equally so.

The professional/business coaches knew a new type of intervention or concept would help firms in business development in the region because they had long collected data and insights from firms and understood some of the changes happening and shaping how business is done. However, they did not have the answer to this challenge – what type of service, concept, or intervention would prove useful in practice? So they set out to collect more data and insights by interviewing and meeting representatives of firms to decide- with the firms – what could be a concept worth experimenting with and piloting. Thus, it can be argued that *taking a wider look – meeting with firms from industries one does not usually collaborate with – enables building a knowledge base that can be successfully drawn from later in practical business development.*

Equally important is **understanding customers**, knowing their lifeworld, recognizing potential customers, or planning "*who could be [the] right customer for us.*" This decision concerns the strategy of the PSF, the value, and the vision the firm wants to move toward. Naturally, as collaboration and co-creation with customers often take the form of projects, project knowledge and knowledge about new service development are essential. Studies 1 and 2 show that since the business environments of companies and even industries change rapidly and the customers are/become more demanding and knowledgeable, understanding change is an essential type of expert knowledge. Knowing how to forecast what one's company and its environment might look like someday, as well as customers' firms and their environments, is important, respectively. I would argue that just asking what the customers or other collaborators think or expect is insufficient; something else is required to find the real challenges or development needs. Bringing people together, encouraging them to share their ideas, challenges, and needs, and understanding what tools and methods could work are essential parts of the expertise of PSP to unearth the real challenges of the customers.

Another important area of expertise is having knowledge of co-development and learning. Study 1 introduces the idea of developing a community for learning. The PSP needs to understand theories and platforms for learning and how to steer, facilitate, and coach groups to support customers in their learning and competence development process. In addition, an important aspect is knowing how to take a step back or a wider look at development and learning. In S-D logic, this denotes understanding the institutions and institutional arrangements at work while people engage in group work and collaboration. What various norms, symbols, rules, and different organizational cultures affect the way that for example a learning community functions, and can these institutions be resources to draw from in development?

6.1.2 Practice-based expertise

Practice-based expertise denotes the knowing-how in a professional service context and is about applying specialized skills and knowledge (e.g., Vargo & Lusch, 2004). Practice-based knowledge is gained through experience, is more case-specific than theoretical knowledge, and is more difficult to explicate; it is also rather intuitive, implicit, or tacit. In this study's case, all three studies demonstrate how professionals utilize their practice-based knowledge, especially in the context of coaching, executive education, and strategy work. **Table 7** presents the insights from original studies, with second-order concepts and aggregate dimensions. Whereas the knowledge-based expertise discussed in the previous chapter is theoretical, knowledge about business and different methods of collaboration and coaching and steering group work, practice-based expertise is about putting theoretical knowledge to use. It means having mere

factual knowledge about something is insufficient; the ability to connect the dots, apply, adapt, and integrate is essentially service co-creation.

Table 7. Practice-based expertise.

Insights from original studies – first-order themes	Second-order concepts	Aggregate dimension
• **Challenging oneself and others (new projects, experimenting, relationships, contexts, concepts)** (Study 1, 3) • **Co-strategizing (tools, methods, how-to), starting from the outside in, not the inside out** (Study 3) • **Engaging in authentic dialogue with potential and existing customers** (Study 3) • **Engaging partners and collaborators** (Studies 1, 2, 3) • **Taking a broader look at marketing** (Studies 1, 3) • **Embracing uncertainty ("tramping through the snow") and change** (Study 3) • **Deciding and taking concrete steps (to realize the desired future)** (Study 3)	Knowing practical business development	Practice-based expertise
• **Knowing how to create an engaging space (physical, mental space and place) for learning and creativity** (Studies 2, 3) • **Creating a framework** (Study 2) • **Utilizing temporality (when it is time to wrap up)** (Studies 2, 3)	Knowing how to create a space	
• **Identifying the potential resources and their usefulness** (Studies 1, 2, 3) • **Keeping it concrete and relevant** (Study 3) • **Encouraging participation and interaction** (Studies 2, 3) • **Understanding how to outline expectations and liberate participants from other expectations and routines** (Studies 2, 3)	Knowing how to enable resourceness	
• **Knowing how to utilize the participants' combined experience and expertise; being a kind on conductor and/or scriptwriter** (Studies 2, 3) • **Understanding that the knowledge and answers reside in the group and making the group the expert** (Studies 2, 3) • **Having the ability to guide but not impose** (Study 3) • **Understanding not to assume too much beforehand** (Study 2) • **Having concrete ways of enabling knowledge creation, integration, and exchange via tools, examples, ideas, material things, metaphors, music, pictures, videos, movie clips, movement, change of places and scenery – anything that engages and encourages people, helps others, and helps people learn independently** (Studies 2, 3) • **Having the ability to take the central role; understanding and enabling changing actor roles** (Studies 2, 3)	Knowing how to facilitate knowledge co-creation	

The expertise of **knowing practical business development** is evident in all my original studies, in Studies 1 and 2 in the context of developing services with customers for executive education, coaching, experimenting, and co-creating tools and methods for

participants to adopt and apply in their respective organizations. Developing learning camps is about practical business development, starting with the knowledge of business development, change management, industries in the area, and current recognized challenges and settings to develop something novel with firms and their representatives. Especially evident in my original studies and their findings is the importance of developing concepts, experimenting, and being ready to change the tools, themes, and platforms. First, experimenting is about listening to the customers and being prepared to act based on their ideas, needs, and reflections. Of course, the professionals need to have a frame – an idea of what will be developed – but being ready to adapt and give the customers responsibility for joint development is equally important.

Mia, a business coach with a prominent role in facilitating the learning camps, reflected, "I want to stress the contextuality, and it is a luxury that we have been able to do these different things and projects and have been able to look for solutions for problems. One does not develop in isolation, and that is the thing here; neither we nor the customers develop by themselves. When doing things together, we also share the responsibility, but it is the responsibility of a facilitator to encourage and root participants when we get out of [our] comfort zone and learn to embrace uncertainty."

Study 3 adopts a more strategic stance focusing on the business development of professionals' own organizations at strategic level, how to find resources (partners, mentors, collaborators, developers, customers, services), and deciding how to realize the vision and engage in business development. The idea of concrete steps, whether developing one's organization or service co-creation with a customer, is what I want to highlight. *Thus, the expertise of professionals is directed to enable customers to define, decide on, and take concrete steps, whether experimenting, piloting, or productization for example.* And, the fact that many, if not all, the resources needed already reside in the customer organization; it is the question of enabling resourceness, helping the customer realize everything that can be drawn from and used as resources, materials, and sources for development. Often, colleagues, collaborators, or partners are unaware of all the expertise that resides in the group or organization; we simply do not discuss it or share our experiences enough. In Study 3, one takeaway or conclusion was that it is necessary to take time to engage in dialogue and sharing ideas and experiences But to decide what needs to be done and agree on the steps that need to be taken is equally necessary. For this type of work, the professional from outside the focal organization can be vital in asking the right questions, challenging the partners and helping make conclusions.

When collaborating with customers or multiple customers simultaneously, the expertise of **knowing how to facilitate knowledge co-creation** is highlighted. To support customers and engage them in resource sharing, integration, and development, experts need to know how to create a space for co-creation, with space denoting a both physical and mental space for development. The professionals utilize

concrete tools, examples, ideas, material things, metaphors, music, pictures, videos, movie clips, movement, change of places – anything that engages and encourages people to share, engage in dialogue and not just discussions, help others, and learn.

I will take an example from Study 1 and take you to the third camp and the last day of it. On that last morning after coffee break, the participants returned to the working space and found envelopes assigned to each of their chairs to read the question or task as inserted into an envelope and continue from there. This was when we could see the results of all the facilitation: using space, creating task(s), asking questions, using metaphors, showing videos, encouraging, questioning, appreciating, challenging various crafts, and moving from one working space to another. The participants carried and held up the discussion, assigned tasks to one another, and sought answers, solutions, and examples by sharing experiences. The coaches could step back and let the participants "take over." However, as the coaches later reflected, letting go was not easy. So, the argument is *that facilitation is crucial, but an equally important area of expertise in service co-creation is to let the customers and collaborators take center stage.* Thus, professionals need to enable and encourage change in actors' roles and take center stage but be prepared to take a step back and allow customers to take a more prominent role.

Knowing how to enable resourceness interrelates with facilitation, yet I want to highlight a distinct expertise area. Basically, resourceness denotes an ability to encourage participation and interaction. Experts need to guide customers to identify potential resources and their usefulness. This requires an ability to guide the participants to open up, discuss, and share what they have done, how they could help others, and how to benefit themselves. Only by sharing their stories, examples, and experiences from different contexts and expectations is it possible to know what kind of resources reside in the group or organization. One crucial aspect in enabling resourceness is understanding different contexts. Of course, the PSP cannot have extensive knowledge regarding every context or industry. Thus, the expertise lies in building a bridge between customers from varied industries and contexts. *Bringing people and organizations together helps one view things from different angles, learning from the experiences of others, and looking for new and even unexpected ideas and examples for learning and business development; realizing what one could use as a resource is also aided by keeping things concrete and jointly deciding what is relevant.*

One example of resourceness is found in learning camps and Study 1. During the second camp, an hour was reserved in the afternoon for the small electricity company. The CEO introduced their ideas for the future, how they wanted to focus more on pure energy – wind-generated energy – and discussed the strategy work that had been going on. Others listened and posed some questions and ideas without the discussion getting into concrete ideas. During the third camp, the CEO had a more concrete task for the group. First, he summarized some of what he had discussed

during the previous camp, then assigned the other participants a concrete task. He invited them to discuss in a few small groups, ideate, and then tell him what the electricity firm should look like or be like in ten years for them (the other participants) to become or be a customer of the firm. This task resulted in graphs, lists of concrete requirements, ideas, and questions for the CEO: how and where to contact potential customers, how to communicate their services, how to make their values guiding their operations visible to the customer, what kind of additional services the customers could find useful, and so on.

I believe this exemplifies resourceness on two levels. First, a group of people from very different backgrounds and working in various industries can give ideas for business development that are perhaps more unexpected and creative than those from actors with whom the firm usually collaborates. Also, all the managers participating in the camps are consumers who buy electricity and services from electricity companies and have their preferences, expectations, and so on regarding these services and the value they get for their money. In a sense, this type of approach could help in "zooming in and zooming out," getting ideas and viewpoints from potential customers and firms in other industries.

Knowing how to create a space is an area of expertise I propose as the red thread that runs through practical expertise. Engaging people and "get[ting] the best out of them" requires a safe platform and setting for development that invites resourceness and resource integration. Space is physical and mental. The original studies discussed the importance of changing pace and cleverly using spaces to create an atmosphere that invites sharing, trust, learning, and collaboration. For example, when developing something new, getting away from everyday surroundings can produce the feeling of camp and enable resource-sharing and integration. Marian, a business coach, summarized: "*Taking people out of the norm, staying overnight to be able to detach from the everyday activities, endeavoring to create a feeling after the first day of working together so that people are focused on the task and discussions at hand...that is when the best ideas and realizations are reached.*" Finding and creating spaces, whether physical or mental, is a question of experimentation. An important aspect of space is time, meaning giving and taking time for development. Mia reflected: "*One needs to create an atmosphere that supports being open, and the people start to talk about the things that really matter – where they really need support and things they really need to work with. That is why it is important to take time not to hurry and be able to justify to the participants why we have to take some time.*"

6.1.3   Emotional and situational expertise

The previous chapter discussed knowledge-based (theoretical) and practice-based expertise. The third type of knowledge (i.e., the third category of expertise) is the

one I call emotional and situational expertise, which aligns with existing literature. This type of knowledge is labeled personal knowledge and includes talent, aptitudes, artistic abilities, creativity, and intuition (Løwendahl, 2001; Bereiter, 2002; Bereiter & Scardamalia, 1993; Tynjälä, 2008). Next, I will discuss the insights from the original studies in **Table 8** The professional can be considered a social interactor, co-creator, and enabler of resource development. How I labeled these areas of expertise focuses on the experts' roles. One could contend that these are kinds of personal traits or features of professionals. I argue that one can develop these areas of expertise by experimenting and trying new and different things.

Table 8. Emotional and situational expertise.

Insights from original studies – first-order themes	Second-order concepts	Aggregate dimension
• **Intuition and curiosity (understanding the importance of one's lifeworld and experiences)** (Studies 1, 2, 3) • **Encouragement (people make choices on what to focus on and what to ignore)** (Studies 2, 3) • **Flexibility** (Studies 1, 2, 3) • **Openness (e.g., to feedback and criticism and have a readiness to act based on it)** (Studies 1, 2) • **Emotional intelligence** (Studies 2, 3) • **Exemplarity (facilitating by example)** (Studies 1, 2) • **Courage (to experiment and try something new)** (Studies 1, 2, 3)	Social interactor and co-creator	Emotional and situational expertise
• **Balancing and adjusting (e.g., between one's expectations and goals and those of the partners or firm)** (Studies 1, 3) • **Acknowledging and appreciating (e.g., varied knowledge)** (Studies 1, 2, 3) • **Being a storyteller** (Studies 1, 2, 3) • **Compromising** (Study 3) • **Creating by drawing from various sources and choosing what could be used as resources and materials** (Studies 2, 3) • **Trusting the process, the group, and the flow** (Studies 1, 2) • **Building trust to enable resource integration by setting rules/examples, being open, and practicing confidentiality** (Studies 1, 2) • **Pushing the participants out of their comfort zone and into new situations/projects** (Studies 2, 3) • **Reconciling between different opinions, ideas, and directions** (Studies 1, 2, 3)	Ability to enable resource development	

In each original study, a professional is a **social interactor and co-creator.** Being a professional entail using one's intuition, whether inviting managers to participate in learning camps or seeking new collaborators with strategic importance to one's firm. Intuition invites you to try new things that feel right and change the methods, tools, and spaces for learning. Understanding the lifeworld denotes that one is curious to know customers and collaborators better. By showing interest, the

professionals can provide examples and encourage customers to follow suit: lead and facilitate by example.

One example of having emotional intelligence (EI) comes from Studies 1 and 2, where the professionals focus on enabling and facilitating peer learning and developing change management competencies; getting the group to work and develop ideas together is crucial. EI is evident in the work of the experts. Although the participants were all interested in participating and sharing their expertise, how much they were ready to open up varied. While some were very open about their personal experience and the challenges facing their organization, some were more reserved. As Study 1 discussed, the other participants tolerated this lack of input. I argue that this is due to the EI of the business coaches, who could steer the group and its dynamics so that differences were tolerated, and everyone could partake as much or as little as they felt comfortable.

Studies 1 and 2 demonstrate openness in that the business coaches invite constructive criticism and ideas for improvement, and their willingness to act is based on the ideas and feedback. This is also a case of leading by example, inviting participants to adopt the concept of constructive criticism, and building on the ideas of others, whether it concerns change management of strategy work or deciding on the concrete tasks to perform and the next steps to take in business development, as in Study 3.

An **ability to enable resource development** focuses on how professionals use their expertise to permit and empower resource integration. Acknowledging and appreciating varied knowledge is essential since therein lie the possibilities of unexpected and new kinds of resource combinations. For instance, Study 1 discussed the moments reserved for each participating company during which each could take the time and use it however they wanted. They could discuss their brand development, reorganization, strategy work, or experiences regarding owner control. They could ask others to comment, ideate, or engage them in group work and devise suggestions for marketing, product development, and so on. This is a clever way of appropriating varied expertise – giving everyone room to introduce themselves – which helps build trust: Professionals push participants out of their comfort zone, thus inviting them to learn. By pushing themselves, professionals can get the participants to go along. Marian, the business coach, said, "*The organizational boundaries blur when people get to know each other…then it is more about people and not about the organizations anymore.*" Being present in the situation is key. Thus, enabling resource integration could be compared to jumping through a hole in the ice, not quite knowing what to expect. As the findings in my original studies indicate, a script for people to work together to some extent is needed. However, the script must not be too detailed or restrictive so that it enables surprises and disjunctures; those are the situations that may help something new be developed.

6.1.4   Co-creation mindset

Based on my original studies and their analysis from the perspective of S-D logic and co-creation, I suggest a fourth type of knowledge: the co-creation mindset. It is not presented here as a downright or totally distinct category from the others, meaning the expertise and knowledge presented here are partially included in the other expertise areas: knowledge-based, practice-based, and emotional and situational expertise. However, in the ever more networked, interactional, and joint way of conducting business, developing new solutions, and enabling learning, highlighting expertise permitting co-creation is important. **Table 9** presents the insights from the original studies.

Table 9.   Co-creation mindset.

Insights from original studies – first-order themes	Second-order concepts	Aggregate dimension
• **Taking a wider and contextual look at one's business (understanding how markets, institutions, and context frame the co-creation)** (Studies 1, 3) • **Having a willingness and readiness to engage in authentic dialogue (with partners, collaborators, customers, and potential customers)** (Studies 1, 3) • **Having a readiness to invite an actor(s) outside the focal organization to facilitate co-strategizing** (Study 3) • **Having the ability to balance between what we can do, want to do, and what customers expect** (Studies 1, 3) • **Starting with why** (Studies 1, 2, 3) • **Not starting with a solution or project but a willingness to hear what other actors have to say** (Studies 1, 2, 3) • **Understanding the processual nature of value proposition, readiness, and the tools to redefine it (**Study 1, 2)	Ability to co-define value proposition	Co-creation mindset

• **Having an ability to facilitate resource integration through dialogue and knowledge-sharing**
   o **Turning different contexts and institutions into an asset** (Studies 1, 2, 3)
   o **Understanding and enabling changing actor roles** (Studies 1, 3)
   o **Generating a space for resource sharing, integration, creation (community, sense of community)** (Studies 1, 2)
   o **Understanding that what is relevant evolves and changes** (Studies 1, 2, 3)
   o **Making connections and encouraging ownership and collective responsibility** (Studies 1, 2)
   o **Helping participants enter unfamiliar zones and letting go of the script** (Studies 1, 2)
• **Understanding dynamism (and what it means to each actor)** (Studies 1, 3)
• **Deciding together what collective means** (Study 1)
• **Finding a way to accommodate a clearer vision** (Study 3)
• **Having the ability to create and enable inclusiveness** (Studies 1, 2, 3)
	Enabling collective creation (of value)	

The insights in the table are not meant to be all-encompassing; instead, I have collected insights that can give readers an idea of what is intended with the co-creation mindset. First, co-creation mindset denotes understanding the processual nature of value propositions. Value proposition signals why something is done – what the participating actors expect to get out of collaboration.

Each study's insights highlight the expertise and experience denoting the **ability to co-define value proposition**. Whether it is the value proposition of a PSF on a strategic level or the value proposition co-created with the customer (to support them in their value creation), it is always a balancing act and an act of listening and looking for common ground and denominators. Therefore, understanding the environment (industries, the political environment, the competition, customers and potential customers, as well as ideas for the future, current, and potential resources) is the professional's essential area of expertise. A constant willingness to learn more about these aspects affects co-creation.

Adopting and developing a co-creation mindset entails realizing that value proposition can be and needs to be revisited and sometimes redefined. The ability to define value proposition invites us to take a wider look at development and resource integration – an ability to recognize the contexts and backgrounds of actors coming together and the rules, norms, culture, personal history, and experiences that shape and affect how they are willing to participate. Professionals need not only be aware of the institutions guiding the thinking of the customers and partners but the institutions that guide and affect their own thinking – not only being aware of them, but trying to turn them into resources and something the actors can draw from. This awareness can be done via examples, inviting the participants to share their experiences and describe how their organization has done things.

Study 1's results highlight the defining value proposition with the customer, not for them. As these results discussed, participants were curious when they came to the first workshop – the first learning camp. Developing learning camps began with the idea of co-developing a platform for managers in different companies where they could take time to confidentially discuss the questions and challenges they face as change managers. The idea of providing time to discuss things and that what happens would not be rigorously planned but co-created along the way was introduced to them. After the first learning camp, the participants gave feedback. They were eager to continue but somewhat confused, wondering, *Where is this headed? Is participating* worth it? What would they get from participating? This was a crucial learning moment for the facilitating business coaches. I came with the understanding that they may have kept the script and objectives too open, described them too vaguely, and not listened to participants carefully enough. Thus, the second camp began with a discussion of where the value proposition was jointly discussed and decided. The business coaches facilitated the discussion: Why are we here? It was discussed that in a rapidly changing business, a good manager continuously develops and improves their organization concerning the

speed of addressing the change. <u>How</u> to achieve this? The best ideas can come from talking aloud and listening to others. <u>What</u> do we do? Thus, we take the time to reflect and exchange experiences to forge our way into the future.

Also, part of the co-creation mindset the facilitators have and develop is that they enable and invite customers and collaborators to share their examples and processes regarding value creation with others and induce among them a readiness and willingness to hear what others have to say. Study 2's findings highlighted this enabling and inviting by exploring the facilitation activities in particular. For example, during the second learning camp/workshop, the representatives of Bathroom Solutions Ltd. shared their experience of developing and communicating their brand after a merger with another company operating in the same respective industry (fittings for bathroom and greenroom). The process was well-designed with clear stages and seemed to run quite smoothly. In contrast, participants heard about the more experimental and start-up type operations and processes of TechCompany Ltd. They had recently become part of a larger corporation, meaning they needed to adopt more structured processes concerning marketing, communicating value propositions to the customer, and building joint understanding and processes in their local organization. These kinds of situations and examples enable learning from others' experiences and looking for new methods, tools, and processes that could be useful in taking a processual view of value and its emerging nature.

As defining and realizing value proposition is a continuous and practical process, a co-creation mindset includes abilities and practices to facilitate the collective creation of value. Although this might seem obvious, the starting point for collaborative creation is an ability to create and enable inclusiveness and inviting actors to decide what the word collective means to the group of people working together and understanding that what is relevant evolves and changes. Facilitation is enabled and supported by understanding different contexts and institutions (rules, policies, organizational cultures, industry rules, and so on) and contexts and drawing from them via examples and cases for resource development and learning. The importance of these institutional arrangements is highlighted in the results of each of my original studies.

6.2 Expertise development

This chapter will discuss developing expertise. **Table 10** presents the insights from the original studies concentrating on and illustrating expertise development. The table categorizes these insights by describing how co-creation in networks provides possibilities and arenas for expertise development related to each expertise area: knowledge-based, practice-based, emotional and situational expertise, and the co-creation mindset. In addition, the table shows a connection to key concepts of S-D logic: value, actors (actor roles), and resources.

Table 10. Development of expertise – insights from the original studies.

Expertise area	Study 1	Study 2	Study 3
Knowledge-based expertise	• Learning to embrace and utilize temporality in service co-creation (**resources and value**) • Not meeting customers with the mindset that one has something to offer or can educate them, but instead, taking the customer as a starting point and exploring what they and the organization need (**actors**)	• Developing an insight into various industries and learning to identify cross-sectional development themes (**resources**)	• Learning to balance between tailoring and developing concepts and services applicable in other contexts at another time: service creation and productization (**resources**)
Practice-based expertise	• Learning to take a wider look at resources; to appreciate and facilitate resources • Learning to become a playwriter – writing a script for working together to some extent (**resources**) • Creating a sense of community for a collective creation of value (**resources and value**)	• Developing practical knowledge of facilitation – learning by doing (resources) • Learning to give space and trust that the participants "carry" the working together (actor roles) • Learning to give disjuncture a chance (resources)	• Learning the continuous strategy work by engaging in dialogue and compromising, challenging, finding common ground, and being open (resources and value)
Emotional and situational expertise	• Learning to trust one's intuition in finding tools, solutions, and methods *that* work (**resources**)	• Learning to trust the experiences and knowledge residing in the group: there are no stuntmen; everyone's ideas and experiences are important (actor roles and resources) • Prepared to learn from collaborators and partners (resources)	• Being more open regarding connections and networks: who could be partners, customers, and collaborators (**resources and actors**)
Co-creation mindset	• Focusing on the process instead of extensively endeavoring to define the goals and objective; allowing something to emerge: "Creative chaos works after all" (value) • Learning to invite participants to co-define "why we are here" (value)	• Bringing people together from different companies and industries who do not know each other and then taking on the challenge to co-develop something together (value) • Questioning whether one wants to consciously and continuously develop oneself or do something more familiar and adhere to established practices (resources)	• Continuously seeking actors to co-create with. Searching for interaction, be it with customer organizations or other actors who can aid or "help us on our journey," is essential for success (**value**)

First, the results of my original studies indicate that networks can provide an arena to increase knowledge-based expertise: understanding of different industries, organizations, and contexts, as well as policies, strategies, service concepts, and group facilitation methods, and meeting experts in various fields. Using temporality and considering it a learning resource can increase the knowledge base. Bringing customers and other stakeholders to do something that only lasts a defined period enables customers and stakeholders to participate and assess how many resources they need to invest in collaboration. Time is a valuable resource, and in a multi-actor context, one can develop one's ability to look for the challenges, needs, and objectives shared between customers, look for common denominators, and decide on objectives. When time is of the essence, professionals must learn to make connections, ask the right questions, and collect information within a certain time frame.

One important aspect and a chance for knowledge development comes when professionals meet the customers with an open mind and are ready to listen and hear what they have to say. This may not often be easy, especially when professionals have years of experience developing interventions and services; proposing a concept, or service, or course of action to customers may be easy. Instead, engaging in authentic dialogue and listening increases theoretical knowledge since customers are always best informed regarding their business and organization.

If we consider developing new services or concepts and the interplay between tailoring and developing ideas that could become concepts and services applicable in other contexts and at another time, knowledge about productization is essential. An understanding of developing one's business also entails knowledge about customers, potential customers, and their needs. That is where networks and networking is essential. Discussing and collaborating with representatives of various industries, development organizations, research organizations, and so on increases the knowledge base regarding customers and their changing needs.

Networks provide an opportunity to seek and find those actors with whom experimenting and developing new methods and concepts is possible. Developing one's knowledge base is possible by realizing one does not have all the necessary knowledge about industries, services, and organizations and when one is ready to learn from customers and other stakeholders. This development is facilitated in the networks by placing oneself in new and unfamiliar situations. Regarding developing knowledge-based expertise, networks can be considered depositories of information, experiences, and understanding. For expertise development, putting the knowledge to use is a requisite. Expertise development and learning is not only a direct transfer of information, receiving knowledge, ideas, materials, contexts, or tools. Based on my studies, expertise development occurs in social construction and is about creating and, more importantly, co-creating meaning.

Practice-based expertise is about putting theoretical expertise to use. For example, although knowledge of theories in learning and managing group dynamics is essential, such knowledge becomes part of the repertoire of professionals when they apply the knowledge in practice and experiment with it. This is also an area of expertise that, I argue, is prominent in situations and processes where several actors with divergent backgrounds, experiences, and organizations come together. In these situations, taking a wider look at resources allows professionals to develop their expertise. They need to look for and find the tools, methods, and examples that enable actors to recognize the expertise, connections, ideas, meanings, and modes of engagement that reside in the group working together because the professionals do not teach the customers or participants. Rather, their role is of an enabler so that the group functions and participants (as in the case of learning camps) take responsibility for their learning and that of other participants. Practical knowledge of facilitation is due to trial and error, experimenting and absorbing the customers' feedback, making changes based on that feedback, unlearning, and letting go of the mental modes, tools, and materials that do not seem to work or that customers do not find useful.

Study 1 discusses how the participants were unsure about the objectives of the learning camps and the possible value of participation after the first workshop; they did not know where the whole thing was headed. I argue that these kinds of situations are at the heart of developing practical expertise, as they provide a possibility to learn about creating the script for working together and striking the right balance between trusting the process or going with the flow and the structure. They also help the professionals see how individual the learning process is: Some are acquainted with and feel more comfortable working with a clear structure, while others are more inclined to ad hoc learning and experimentation. An important realization is that it may take a while before one realizes the usefulness of some ideas or methods, tasks, tools, or contacts that were introduced to them some time ago.

Situational and emotional intelligence can be argued, to some extent, to comprise personal traits or be part of personality, but it can also be developed. It develops when a professional meets customers and stakeholders, trying to keep their minds open, throwing oneself into challenging situations and processes where multiple actors come together, developing a readiness to learn from customers, and having the courage to trust one's intuition. And naturally readiness to hear what others have to say, equally. Equality entails learning to tolerate variance regarding customers' willingness to participate, open up, and share their ideas and experiences. The essence of situational and emotional intelligence is the ability to handle interaction and sense how others feel or how to engage them. In interaction, people try to share their ideas and thoughts, explain themselves, and learn from each other.

Based on the results of my original studies, a co-creation mindset is a principal expertise connecting all expertise areas. This mindset is about taking a different

approach to collaboration that is more open and equal, experimental, processual, and collective; it is also about learning by doing, sometimes failing and trying again, and beginning why something is important and something is done.

Study 1's findings suggest that a co-creation mindset expertise develops by learning to look at resources, especially knowledge, as something that can be co-created; thus, his mindset is highly contextual, distributed, accessible, and evolving. Communities are an arena for sharing, adapting, and developing new knowledge. Thus, developing a sense of community or creating learning communities supports obtaining a co-creation mindset because, in communities, stories are shared, people can access knowledge and create their own meaning, take what they can use, and discard what they cannot.

A co-creation mindset not only develops in the situations and processes where everything goes smoothly. When people from different organizations with various backgrounds, organizational roles, and varied expertise, needs, and expectations come together, differences in opinions and disjunctures may exist. Developing a co-creation mindset means there does not have to be a perfectly coherent narrative or agreement about everything. However, a co-creation mindset is set when there is a willingness and readiness to listen to differing opinions, why people think the way they do, and how they formed their opinions and worldviews. Developing a co-creation mindset is about appreciating differences while inviting actors to define why something is done: "Why we are here."

I end this chapter with two quotes from business coach Mia reflecting on her learning and expertise development: *"Getting experienced in finding the joint and interesting theme to work with, in this case, was the change management. One has to keep up-to-date…why it is important to interview the actors to find out about the changes they are facing. Learning to ask the right questions is the key and not to plan too far ahead but rather enable the people to recognize what the common thing – the common focus – would be."*

Mia goes on to say, "The situations that remain with you, for example, taking pictures with a Polaroid camera and writing something for yourself behind it… I know some participants still keep these in their wallets. I wrote to myself: Do not lower the bar. I mean, these kinds of projects and situations are for challenging oneself; one could get there easier, but breaking one's own boundaries is where one develops one's capabilities. And many times, one has failed, too. But one has to challenge oneself to engage others to challenge themselves, too. When a great group of people come together, great things happen. I have learned to trust my own doing."

The quotes illustrate how a professional thinks about expertise development. Expertise develops via deliberate practice: networking, developing knowledge and an understanding of actors, engaging in something new, creative and unprejudiced thinking, being open to looking at things differently, changing one's thinking, being

curious, collaborating, and making new connections. This definition means perhaps expertise is no longer so much about a position or formal degree. In a co-creation context, expertise is more about passion for excellence and making a difference.

6.3 Empirically grounded framework of expertise and its development

This study examined developing expertise in co-creation networks in B2B services. To accomplish that, exploring the expertise and what it comprises in B2B services is important before identifying and elucidating expertise development and the role of networks in the development. Chapter 3 presented this study's theoretical framework. The theoretical framework has been perfected by adding the empirical findings based on re-reading and reviewing the original studies (Dubois & Gadde, 2002). As Chapter 3 discussed, categorizing expert knowledge as a key resource in PS (e.g., Løwendahl et al., 2002) guided me when I began studying expertise in a professional B2B service context. This study analyzed and categorized the expert knowledge by incorporating the views on resources presented in S-D logic by looking at collaboration and the work of professionals by focusing on co-creation. More specifically, the key concepts of S-D logic have been utilized as a lens through which to scrutinize the expertise areas: service co-creation, actors, resources, and value.

Thus, the empirical framework binds expertise areas and the key ideas regarding resource integration, sharing, and creation, as S-D logic discussed. This approach is highly relevant to the B2B service context, in which customers and other stakeholders closely participate in service creation. The framework is constructed based on defining co-creation as a creative process of resource integration with a series of activities in facilitated social interaction involving several actors and iterative construction and deconstruction of knowledge and experience. This process is embedded in a certain value-creation context and environment (Payne et al., 2008; Payne, Storbacka, Frow, & Knox, 2009; Roser, DeFillippi, & Samson, 2013; Mitleton-Kelly, 2011). This study focuses on resources and expertise – an ability to use resources in co-creation (e.g., Vargo & Lusch, 2004; Lusch & Vargo, 2006). Thus, the categories at the left side of the framework **Figure 5** are labeled as expertise instead of knowledge, aligning with the discussion of developing expertise via practice and building on the argument that learning is the only path toward expertise (Gobet, 2016, 138).
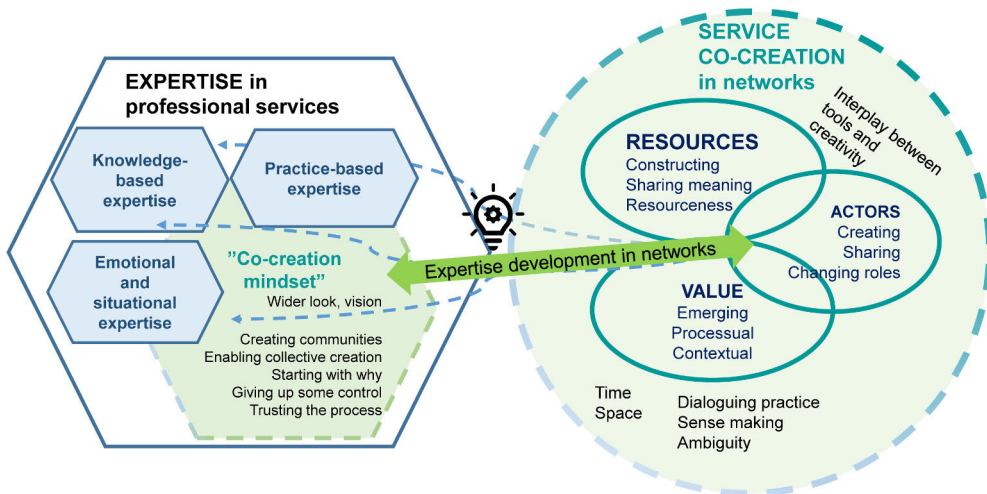
Figure 5. The empirically grounded framework of expertise and its development.

Expertise in B2B service comprises knowledge-based expertise (the basis), the knowledge base the experts stand on, the theoretical understanding of business, resources, actors and their role(s), and value proposition and its development. It is about understanding resources, business development, and customers and comprises marketing knowledge and knowledge of co-development and learning.

As the title suggests, practice-based expertise is honed and developed via practice. If knowledge-based expertise is about understanding the resources, practice-based expertise is about knowing how integrating, sharing, and creating resources can be enabled and how to concretely enable resourceness and facilitate knowledge co-creation. It comprises knowing practical business development and how to create space (for development).

Situational and emotional expertise highlight the role of professionals in service co-creation. With their own personalities and examples, they can create an atmosphere where sharing knowledge and experimenting is not only invited but supported. Thus, the expertise is about being a social interactor and co-creator with the ability to enable resource development. As the findings section discusses, the fourth type of expertise this study proposed is the co-creation mindset.

The co-creation mindset is presented in the background regarding other expertise areas on the left side of the framework since it is the overarching expertise area enabling the professional to fully utilize their expertise when collaborating with customers and other stakeholders. Also, the idea is not to propose it as a totally distinctive area of expertise but as a compilation of those knowledge resources and abilities with a prominent role when focusing on service co-creation in B2B services. Based on this study's findings, the co-creation mindset is needed to fully utilize one's

expertise in a network context because it represents a different stance or perspective, approach to collaboration, a more equal and processual standpoint, as well as appreciating the knowledge and resources of all actors, jointly defining and deciding why something is done, and what the intended objective is. Taking this standpoint also means professionals need to be ready to relinquish some control over the process or intended outcomes and focus more on the process instead of the objectives. However, this does not mean the strategic thinking or stance is unimportant; it means professionals need to develop a frame flexible enough to permit resource integration, sharing, and creation, starting with the expertise, experiences, and goals the actors involved co-decide on.

Based on this study's findings, *expertise in B2B professional services is defined as a constant development and use of knowledge and skills to facilitate and enable resource integration in the collective creation of value.*

The right side of the framework presents the key concepts of service co-creation through which the expertise and its development are looked at in this study. First, expertise develops by learning to understand the nature of value – that it is contextual, unique, and emerging. Each actor defines the value from their perspective, which makes deciding why something is done (i.e., defining value proposition) challenging. Professionals need to engage other actors in co-defining the value proposition, looking for common objectives, and reaching a compromise. In addition, realizing the benefit of collaboration may take time; it is always unique and individually assessed.

Actors are engaged in service co-creation. The term actor can refer to a service provider, customer, business organization, government organization, nonprofit organization, household, or individual (Lusch & Vargo, 2016, 87–88). In the context of my study, the actors are PSPs, business coaches, customer organizations and their representatives, the managers participating in learning camps or strategy workshops, and the research organization involved in the process. Understanding the word actor and what it entails is more than thinking about the label we can give those engaging in co-creation. "Actor" signals agency, goal orientation, active doing and participation, and occupying various roles. For instance, each manager participating in the learning camps comes to the workshop representing their respective organization and their role in it. They are all experts in their fields but learners and participants during learning camps. The facilitators – the business coaches – are also experts, but regarding the profound understanding of the businesses of the participants, they are also learners, as they do not have extensive knowledge of all the industries. The role of a business coach is that of a facilitator, enabling other actors to share resources, create knowledge, and change roles. The findings of Studies 1 and 2 especially demonstrate the changing roles of actors. Most notable is

the diminishing role of facilitators once the participants begin taking responsibility for their learning and the learning of others.

Service co-creation is fundamentally about resources and their creation, sharing, and integration. In the individual studies, resources are identified, and their integration is discussed from the perspective of developing a learning community in executive education, facilitation in business coaching, and strategy work. As I mentioned several times, S-D logic invites us to adopt a wider look at resources. To accomplish this, the professionals – the experts – must look for and use the tools, methods, examples, and materials that help actors share their experiences, examples, and materials, as well as engage in dialogue that facilitates sharing meaning, constructing understanding, and contributing new knowledge and ideas. Primarily, the work of experts can be considered an interplay between tools and creativity. When deciding on the future of the PSF, networks force and provide an opportunity for professionals to decide and develop a balance between tailoring and productization. This balancing also links to expertise development since it entails questioning whether one wants to consciously and continuously develop oneself or do something more familiar and adhere to established concepts, methods, and services.

In addition to formal education and learning, networks are crucial in developing knowledge-based expertise since they can provide access to resources, people, and organizations and introduce new circumstances and contexts that help professionals develop their understanding. The key is to have the courage and the possibilities to challenge oneself – to intentionally place oneself in new contexts and situations – look for new collaborators and appreciate and recognize the knowledge and expertise of other actors. Also, practice-based expertise is turned into knowing-what, which is turned into skills when theoretical knowledge is used to support problem-solving in real working-life situations. When knowing-how is reflected and conceptualized, it becomes part of an expert's theoretical knowledge base. Essential in this process is motivation – the drive to grow and practice as an expert (Tynjälä, 2008, 144–145; Bereiter & Scardamalia, 1993, 66).

Expertise development involves reflection, action, and dialogue: operating in a network brings a multilayer nature. The actors involved in co-creation all have their own connections, which play a role. That is why zooming in and out is necessary to consider when discussing expertise and its development. Looking at the bigger picture and engaging in varied contexts provide access to myriad resources. Developing a sense of community/common ground provides professionals an arena for creating practices and processes of co-creation utilizing improvisation to ensure value creation and realization. One aspect of this is using temporality and seeing it as a resource. Temporality forces (in a positive sense) all actors to define the value and jointly outline why something is important.

Networks help one recognize one's competencies and what one does not know, thus providing an arena to collect new information and integrate it into one's knowledge base. Networks also naturally offer an arena to experiment, develop knowledge, learn by using one's personality, and build an understanding that creating knowledge is a social phenomenon and process. Networks help develop common understanding and solutions, but for the development the challenge and possibility is to know had decide how it can be achieved. Based on the findings, expertise development is *a social process of challenging oneself by immersing into new contexts, processes, and methods, learning to trust the process, and giving up some of the control, starting with why (value proposition).*

7   Discussion and Conclusion

7.1   Theoretical contributions

This study examined expertise development in co-creation networks in a professional service context. This study's theoretical contributions are discussed next by focusing on each RQ and presenting the contributions of the individual studies and their synthesis.

RQ1: *What constitutes expertise in business-to-business professional services?* In Study 1, the context was executive education, and the focus was on the role of the executive learning community in facilitating collective creation. The theory of collective creation of value comes from strategic management literature (e.g., Bridoux et al., 2011; Felin & Foss, 2005) and marketing (e.g., Kurikko & Tuominen, 2012; Schau et al., 2009), with the focus on mobilizing resources in a community or group of people who want to develop a shared area. Mobilizing resources occurs via co-operation (interaction and sharing ideas) to create value (Bridoux et al., 2011). In addition, the idea of using improvisational theatre activities (e.g., Gagnon, Vough, & Nickerson, 2012; Vera & Crossan, 2004) and looking at the role in strengthening the creation of a learning community was incorporated.

The study's contributions to the literature on PS are twofold. First, the research contributes especially to the literature on executive education and learning, as executive education is one type of professional service where group dynamics and developing it are crucial. The learning community model based on collective creation developed in our study can help conquer some of the existing challenges regarding executive education (e.g., lacking relevance, responsibility for learning, long-lasting change, and resource scarcity). In addition, the findings can be applied to other services and contexts where understanding the complexity, contextuality, and the process of learning and service development is needed. The findings increase knowledge regarding the interconnection between spaces and dynamics of learning and development. They discuss what kind of expertise can enable development beyond structures and boundaries, especially regarding telling stories, listening to them, and constructing joint narratives.

Second, the findings highlight the expertise and expert knowledge of professionals engaged in executive education intervention (e.g., Garret et al., 2008;

Løwendahl et al., 2002). Initially, the study's findings and the executive learning community model drew attention to the equality of participants and facilitators (i.e., PSPs) and the vital role of engagement.

The findings demonstrate how engagement can be enabled, created, and supported. Moreover, the findings demonstrate how professionals use their expert knowledge and expertise via using means (e.g., posing questions based on the lifeworlds of the participants or their customers), materials (e.g., designing spaces and places to support the community and its learning), and modes of engagement (e.g., committing to and emphasizing the responsibility of participants for their own learning) (Allen, 2013). Thus, Study 1's findings represent new pathways for understanding the social and collective nature of learning processes in professional and vocational contexts, with autonomous and motivated participants.

One area of expert knowledge highlighted in executive education is understanding group dynamics and how to manage, enable, and support its development. Study 1's findings also extend prior research on group dynamics and group development by presenting a non-linear, improvisation-based framework, where participants have access to an initial framework for collaborative activity, but no ready-made script is available. In its place is a collective activity from which the script emerges. The framework can augment the models, in which the group development process is considered sequential and linear and goes through predetermined stages (Tuckman, 1965; Tuckman & Jensen, 2010).

Study 2 focuses on facilitation in business coaching. The study's contributions stem from developing a detailed understanding of facilitation in group coaching in a multi-actor context, meaning the participants of group coaching came from five firms operating in various industries. We built on the understanding of coaching being an interactive development process involving structured, focused interaction and using appropriate strategies, tools, and techniques to promote required and sustainable change to benefit the client and maybe other stakeholders (Bachkirova, Cox, & Clutterbuck, 2010, p. 1). Our study also proposes that facilitation enables learning by providing a platform; we demonstrate how this could be done concretely via facilitation activities. Since the aim is to support the coachees in finding the appropriate answers for competence and skills development, this result can appear during or after the process (Audet & Couteret, 2012; Katz & Miller, 1996; Tsai & Barr, 2021).

Introducing the perspective of co-creation helps us develop a detailed understanding of facilitation activities. The analysis suggests that facilitation activities cannot be categorized as theoretical or practice-based knowledge but are an interplay between these, with personal knowledge (e.g., curiosity and aptitude) playing a role. This thought aligns with the ideas introduced in the literature of knowledge as a key resource and developing one's expertise. That is, the knowing-

what or theoretical knowledge is transformed into skills when theoretical knowledge is used to support problem-solving in real working-life situations. Reflecting on and conceptualizing knowing-how or practical knowledge becomes part of the theoretical knowledge base of an expert in PS (Tynjälä, 2008, 144–145; Bereiter & Scardamalia, 1993, 66). Through our empirical case study, we presented a detailed perception and fine-grained analysis of facilitation's role in the context of group coaching and presented the Co-creative Facilitation Framework. Our empirically grounded framework contributes to the literature by introducing three major activities in group coaching that facilitation centers on: creating space for co-creation, enabling resourcefulness, and co-creating knowledge. Conceptualizing facilitation from the view of S-D logic (e.g., Vargo & Lusch, 2004) in a business coaching context emphasizes a facilitator's role in fostering resource integration among the coaches by aiding the coachees to recognize different types of knowledge and experiences and illustrating examples from their own experience and that of the other group members they can draw from. The framework also underlines the contextuality of constructing and deconstructing knowledge and experience. Hence, the Co-creative Facilitation Framework can augment and complement existing models of business coaching.

Study 3 adopts a more strategic approach to expertise. The focus was on strategy work in professional service, especially in two micro-sized firms. Adopting a strategy-as-practice approach (e.g., Jarzabkowski & Spee, 2009) helps us focus on how the actors really co-strategize and how knowledge is produced. The research is built on the idea that co-creation occurs not only with customers but also with other stakeholders. The focus was on the dialogue, and by scrutinizing the dialogue and identifying connections and themes, we painted a picture of how partners co-strategize in practice and how co-strategizing is conducted via five dialoguing practices.

This study's findings contribute to the literature on PS in two ways. First, they focus on developing the business and strategy and highlight the iterative and processual nature of strategy formation. Strategy is built on existing resources but considers the vision for the future and the direction in which the professionals and the service firm want to develop. Collaborating with their customers enables PSPs to acquire knowledge from them, allowing them to offer customer-specific solutions, enhance their own knowledge base (Muller & Zenker, 2001), build an understanding of the joint problem-solving process, and co-construct the service experience to suit the context and the customer's acquirements (Aarikka-Stenroos & Jaakkola, 2012). Second, the dialoguing practices highlight how strategy is agile, it is about reconciling the different expectations (between business partners), surfacing, sharing assumptions, developing common ground, understanding the institutional elements that affect strategy work. Involvement in strategy work helps develop a theoretical

knowledge base (knowledge of industries, customers, potential customers, collaborators, potential partners, etc.) and an understanding of how to facilitate developing common ground and understanding. Third, although we identified the dialogue practices in the context of developing the strategy for the professionals' own firm, professionals can draw from these practices while co-creating with customers. Since both develop one's own business or engage in co-development with the customers, the importance of determining the concrete steps and actions when deciding on responsibilities (resource allocation) is crucial to understand. The idea of strategy work as an ongoing process can inform a PSF more broadly, including examples of reconciling different expectations and how to achieve this.

The synthesis part of my study answers both RQs: *What constitutes expertise in professional services?* and *How can professionals develop their expertise in inter-organizational networks?* Each of my studies builds an understanding of what expertise comprises in professional B2B services by demonstrating what the professionals do when collaborating with customers and other stakeholders. However, my studies also indirectly paint the picture of expertise development. I have composed the empirically grounded framework of expertise and its development by re-reading the individual studies and collecting the findings indicating expertise development. The conclusions of my study's synthesis present a detailed and empirically grounded categorization of expertise in B2B PS. The expertise areas are knowledge-based, practice-based, emotional and situational expertise, and a co-creation mindset. They build an understanding of what expertise is like in a network context, which is informed by the idea of co-creation. More specifically, each study introduces the resources actors can draw from for development and the practices and activities identified to explore the role of professionals – meaning the experts – in those processes. The expertise areas identified and explored in my study augment discussing key resources in PS, with a special focus on building an understanding of the expertise needed to enable development in a group context between the service provider and multiple customers and the role of learning communities and sense of community to support learning and development, with a diverse group of people working together to nurture and sustain a knowledge-creating system (e.g., Garret et al., 2008; Løwendahl et al., 2002; Schau, Muniz, & Arnould, 2009; Senge & Scharmer, 2006).

My study's findings also contribute to determining who is an expert and how expertise develops (e.g., Gobet, 2016; Simons & Rujters, 2004). This study elaborated that expertise is to some extent socially constructed and designed via resource sharing, integration, and creation.

The communities where actors congregate to learn (to develop resources) function as an arena for developing expertise and actors are considered experts in certain contexts and situations. Thus, expertise can be socially constructed since who

is an expert is not always clear-cut, but who is an expert depends on context and what is developed. Is one an expert if they are viewed as one by those with whom they collaborate? This means expertise is also subjectively, not just objectively, defined (as it cannot always be objectively measured). This study focuses on executive education, coaching, and consulting services. Naturally, the picture would be somewhat different had the focus been on medical or legal services for example.

The co-creation approach introduces a more equal starting point for resource sharing, integration, and creation between the service provider and customer since the customer is the best expert on knowing their business, industry, history, and experiences. Thus, expertise is not only socially constructed but situational and contextual. As Mieg (2001, 6–7) defines, "*Human activity, including knowledge, basically routes in an adaptation to the environment constraints: every human thought and action is adapted to the environment, that is, situated, because of what people perceive, how they conceive of their activity, and what they physically do develop together.*"

Although the context of my research has been especially executive education, coaching, and consulting services, this study's insights can be applied to other B2B services, particularly to those where the collaboration is based on extensive interaction, joint problem-solving, and creating spaces and platforms for development and learning. The ability to see the world differently is a mechanism of insight and improvement that is not easily accessed. This study has put forward the idea of using co-creation and resources as a different take on collaboration, as it can help discover additional information, new ideas, and concrete directions for (service) development. Focusing on co-creation can enable and support the ability to construct or discover the additional value that may be unavailable to others within established frames of competition for resources or understanding, allowing them to take new directions.

7.2 Practical implications

The practical implications of this study stem from the individual studies and synthesis part. First, focusing on collective creation of value in developing an executive learning community, offers practical implications for executive education practices in informal and formal educational settings (Armstrong & Sadler-Smith, 2008; Kets de Vries & Korotov, 2007; Tushman, O'Reilly, Fenollosa, Kleinbaum, & McGrath, 2007). The study discusses the process of developing an executive learning community in detail; thus, even if the process was unique and contextual, with the focus on developing the participants' competencies as change managers, interpreting the process can inform those actors engaged in developing interventions and services in an executive education context. Learning is ultimately introduced,

especially by using different means and materials, modes of engagement, and elucidating their role in supporting community creation. In addition, the findings offer insights into how participants can be motivated to contribute their experiences and assume an active role in the program (of executive education).

In addition, while the challenges in executive education (related to program purpose, student characteristics, and class dynamics) diverge from those in management education (Garvin, 2007), the learning community model may have value in specific areas of management education, in organizational development more broadly, and to other professional and vocational contexts with self-governing and motivated participants.

Second, practical implication is drawing the attention of PSPs to the importance of facilitating knowledge creation and integration and sharing and providing examples of and guidelines on how to do so. Although the study was conducted in the context of group coaching, it may have implications for the coaching processes between a coachee and coach and for team coaching programs and interventions. Following the process longitudinally has enabled identifying and explicating the facilitation activities (creating a space for co-creation, enabling resourcefulness, and co-creating knowledge). These activities are relevant in other coaching contexts, business development, and consulting since the importance of taking the time to get to know one another creating the right atmosphere for authentic dialogue, and deciding the objective and why collaboration is crucial and still at the center, even if the context varies and changes. Leveraging the knowledge focusing on extant resources and encouraging recognition of potential resources starts from jointly deciding and defining the value proposition and building a space for learning and knowledge co-creation.

The practical implications also evolve around the idea of authentic dialogue, with dialogue being one of the essential elements in co-creation (e.g., Prahalad & Ramaswamy, 2004; Payne et al., 2008). More specifically, via the findings, engaging in dialogue for co-developing strategy with important partners comes forth, and utilizing customer narratives plus stories for strategy development is also important. The expertise development framework and discussion in the synthesis of this study provide a detailed analysis of the areas of expertise in B2B services. With the narratives and examples in the original studies, the framework may provide a blueprint for expertise development. Most of all, through the findings, I highlight that each area of expertise can be developed by deliberately placing oneself into new situations and contexts and appreciating one's experiences and those of others. Above all else, I find that engaging in co-creation processes and really listening and hearing what other actors say means we have to be ready to relinquish some of the control and trust the process. This mode of engagement is especially applicable when developing interventions, concepts, and processes based on peer learning and

experimentation. In the motivation to study expertise and its development through the lens of co-creation, I talked about the golden circle (Sinek, 2019), outlined why one is engaged in doing something, and defined how what one does differs from what others do – beginning with defining the purpose, motivation, cause, and beliefs concerning one's business or interests. This idea denotes starting with why something is done, signaling the co-creation mindset in PS.

7.3   Limitations and future research ideas

This study has focused on expertise and its development in B2B services. Traditionally, expert knowledge of different types has been the focus of professional service literature, and knowledge has been considered the firm's key resource. My research has been built on categorizing and discussing knowledge in PS. In the synthesis part, I took the ideas of S-D logic and its view on resources as the lens through which to view expertise. More precisely, I have endeavored to understand expertise and its development via the key concepts of S-D logic: service, actors, resources, and value. S-D logic as an approach to value creation, markets, and co-creation has roots in many literature streams and theories, making it a rich theory and enabling its application and study from many perspectives. The research and discussion concerning the key concepts of S-D logic are vast, and value co-creation, with its contextuality and myriad actors involved in integrating resources, is a very complex phenomenon. Thus, in this study, I have simply offered some ideas and abstractions of expertise when looking through the lens of value co-creation. I believe, however, that each of the original studies and this synthesis presents novel insights and concrete examples and highlights what the expertise in co-creation comprises and how networks could provide a platform for expertise development.

Each original study discusses the limitations and future research directions. The limitations initially stem from adopting a qualitative approach. Overall, my dissertation has been conducted as an ethnographic case study and original studies as narrative ethnography and case studies. Adopting a qualitative approach enables openness and allows one to study things in natural settings, focusing on building an understanding and interpreting a phenomenon (Denzin & Lincoln, 2005; Eriksson & Kovalainen, 2008). In addition, case studies are focused on a certain phenomenon in its naturalistic context. This context dependency affects the generalizability of the results. Thus, this study's results may not apply to all PS. However, I believe the insights this study developed through detailed analysis may be at least partly transferable to other research settings, contexts, and services, especially those based on interaction and co-creation.

Second, the research data was collected while I worked on R&D projects. Thus, this study's research objectives have not been the only starting point when deciding

the study's participants, data collection methods and timeline of the research. Naturally, the data was collected in a certain context and represent specific cases. Nevertheless, I believe the richness of data has permitted me to analyze these specific cases and present findings in a way that enables the reader to see where the findings stem from and what the research process has been like. By utilizing varied research data – video-recorded data, interviews, documented observations, and experiences in the field – the idea has been to offer readers a different avenue to understand the research results and context and convey an experience of being there for the reader (Dyer & Wilkins, 1991; Gubrium & Holstein, 2008).

Third, conducting research has been a process of being in there and immersing oneself in the contexts and processes under scrutiny. Of course, the underlying assumption of social construction is that reality is socially constructed and can best be understood by exploring the tacit and implicit and that "no aspects of knowledge are purely of the external world, devoid of human construction" (Stake, 1995, 100). Therefore, research following social construction approach does not pursue objectivity, as emphasized in positivist research (Hudson & Ozanne, 1988). Therefore, the researcher is not detached from the world but is seen as reasonably and actively participating in it. For a researcher who is only at the beginning, understanding and accepting that researchers can only view phenomena through their own subjective history, life experiences, and academic socialization (Maclaran et al., 2011) removes the need to overly stress and tend to the aspirations to be entirely objective. During the research process, I received myriad comments, ideas, and criticisms, one being that I was immersed in my data and context. Because some time has passed since collecting my data, I believe I have overcome some of the challenges of being too absorbed in my data. Also, presenting my ideas and findings in several arenas and receiving comments and suggestions for improvements in discussions with co-authors has helped me attain a bigger picture and take a step back from the data.

As for future research ideas, each original study introduces some. One contribution of this study was extending the concept of co-creation into strategy work, especially in the micro-firm context. The study adopted the perspective of the PSF; although the customers were discussed, knowing the customer and building customer understanding was an integral part of dialoguing practices; customers were not involved directly in the workshops where data was collected. Thus, looking at processes where customers play an active part and participate in dialogue would be intriguing.

Focusing on collective creation and scrutinizing its role in developing executive education programs that would overcome the challenges executive education faces focuses on understanding the process of developing a learning community and including improvising ideas in supporting peer learning, competence development,

and collective creation of value. The research adopted the focus of a PSF. Naturally, an integral part of the process was understanding and hearing the needs of the customers (participants) who actively participated in developing the concept. The research focused not on demonstrating actual learning outcomes or the benefits and value the participants attained but on analyzing the process and developing the framework for learning community creation. Thus, exploring learning outcomes remains an important avenue for further research. More research is needed, particularly on whether, in the long term, a learning community can catalyze long-lasting change in organizations. Integrating the experiences of executives who participate in these types of interventions into future research is equally important. Building an understanding of why some withdraw from the program and others choose to remain committed is important. What factors induce engagement and commitment, and how can these factors be developed? Since the professionals and their ability to work behind the scenes during co-creation is essential, their learning with and of the process represents a key future research area.

As this study's findings discussed, value and value co-creation are intriguing and complex phenomena, not least because of their processual nature and the fact that they are always individually understood and assessed. Participating in an executive education program, business coaching process, or strategy work facilitated by an expert outside the firm, customer, or participants may address and reflect some of the benefits and takeaways from the participation. However, I believe it is only when time passes that most of the benefits – the value – will be realized and recognized. Thus, an important avenue for future research would be addressing the aspect of time in longitudinal research, focusing on takeaways and value realization from the co-creation processes regarding participants and PSPs with the facilitator role in co-creation processes and projects.

The synthesis discussed and categorized expertise in professional B2B services. I have also tried to show how professionals use their expertise in my original studies and the synthesis. Networks provide a platform for expertise development in many ways, and I have endeavored to explicate and show some of them in this study. The wider discussion of the nature of networks or the different type of networks or ecosystems is beyond the scope of this study. Thus, focusing on the nature and structure of different kinds of networks and how they could enable expertise development would be important.

Based on this study's findings, I argue that in the ecosystems, with their more permeable and flexible nature – changing actors, interconnections, fuzzy borders, and myriad actors – the expertise in making connections and bridging people for resource integration would be different. Thus it would be important to study for example facilitation ecosystems, as they are still increasing their significance in businesses. As mentioned, the professional services at the focus of my study have

been those of coaching, consulting, and executive education. Thus, future research should build an understanding of expertise from the perspective of resource exchange, integration, and creation in other types of PS (e.g., law and accounting firms as classical PS) with the highest degree of professionalism and more strictly defined professions.

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