

Capturing the ‘Sparkle’ - Participative and inclusive strategy making in a children’s hospice

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Summary

Strategy making is a process often shrouded in mystery in the realm of the senior management, however there is a move to understand what happens when the process is more open and others are involved in strategy making. The purpose of this research is to explore the effect participative and inclusive activities have on the strategy making process. This research adopts an engaged scholarship approach, working with a case of a children’s hospice organisation to implement a participative and inclusive approach to making strategy and observe the effects. The major conclusions of this research is that participative and inclusive activities are not binary (i.e. present or not), but they shift and move in intensity flowing through the strategy making process. Our research also shows that the outcome (i.e. content) of a participative and inclusive process appears to be authentic to the organisation with the words of the actors being retained.

Word count: 6370

Introduction

The strategy making process is one which is still shrouded in some mystery, with the link between the formulation and implementation still vulnerable to organisational pressures such as organisational politics and procedural justice and rationality (Ackermann and Eden, 2011). The traditional approaches to making strategy are deeply rooted in the managerial approaches of the late Victorian era, practices such as Taylorism, where the 'thinking' jobs were separated out from the 'doing' jobs excluded employees from any participation in the managerial processes. Thus, managers were allowed to do the thinking in an organisation and processes such as developing strategy were done by the senior managers of the organisation and lower level managers and employees were only used to execute the strategy. This thinking has dominated much of the strategy making literature which has focused on the positioning and planning of strategy by senior management (Miller et al., 1982) with most studies unconcerned with inclusion or participation (Mantere and Vaara, 2008).

Traditional studies view strategy as an object an organisation has and is concerned with the content of the strategy and the tools and methods that allow managers to fill up the content of their strategy. More traditional schools of strategy think of the organisation as the unit of analysis where it is common rhetoric for the organisation to be discussed as the rational decision maker. This has resulted in the individuals involved in strategy making being dismissed as unimportant. Traditional thinking in strategy making has also been guilty of viewing strategy as an output of a single decision making exercise i.e. the output from a strategy away day that is printed up into a glossy brochure for circulation around the organisation. This gives the traditional view of strategy as a plan formulated by top management in a strategy away day, which are then forced down through the organisational hierarchy. A view which is still assumed in many studies of strategy making and strategic management.

A shift in thinking has resulted in the realisation that strategy is tied up in the social processes and practices within organisations (Burgelman, 1988; Eden, 1992) and that has generated the 'strategy as practice' school which is less interested in the traditional approaches to strategy. This school moves away from strategy as 'the' core, i.e. the strategy is something an organisation has (an object) and an object that can be manipulated and shifted by the organisation in response to external changes, to a focus on the individuals who actually do strategy. This has resulted in strategy being considered from various perspectives, as a social process which has discursive elements, identity and agency considerations, and a sense of negotiated decision making.

The focus on individuals who make strategy (i.e. actors) opens up the question of 'who' can make strategy and who should be involved in the strategy making processes. Studies have focused on involvement of various types of stakeholders in strategy making and have shown that a lack of inclusion in the strategy making process has been linked to a number of failures, such as; inadequately formed strategies (Floyd and Wooldridge, 2000) and poorly executed implementations (Candido & Santos, 2015). Further, Mantere and Vaara (2008) highlight that a lack of inclusion is also associated with 'organisational inequality' which they state is actually a moral question to be considered.

While the importance of inclusion had been acknowledge there is a growing realisation that inclusion and participation in the strategy process is a problem (Mantere and Vaara, 2008). There has been limited attempts at understanding why there is an issue with inclusion in strategy processes (Hodgkinson et al., 2006; Mack and Szulanski, 2017), concluding that the nature of strategy can be excluding due to a number of factors; such as the language used

(Maitlis and Lawrence, 2007) and the methods used to create strategy (Roos et al, 2004; Vaara and Whittington, 2012). What is missing from the literature on inclusive strategy making is the conceptualisation of inclusion (or excluding) behaviours in strategizing and how this effects the outcome of the strategy making process.

There is growing recognition that such ‘traditional’ approaches to strategy making are problematic and that a more inclusive approach would generate improved commitment, better integration of goals and shared sensemaking across the organisation (Arnaud et al., 2016). The limited research in inclusive strategy making has focused mainly on the participation of lower level employees and concludes that participation can often be a problem due to the excluding factors (i.e. terminology and process) (Mantere and Vaara, 2008). Research in this area is still in its infancy and more investigation is needed into how effective these practices are to the organisation. Therefore, our research aims to understand how an inclusively designed process effects participative and inclusive activities as well as the content of the strategy made. We will gain these insights though working with an organisation, in an action research mode, to design a participative and inclusive process and observe the effects this has on the activities and content of the strategy developed.

Theoretical background

There are have been many studies describing and conceptualising how strategy is made in organisations concluding that many variants of strategy making can manifest in different organisations. Hart (1992) presents a typology of approaches to strategy making including the role that diverse actors, including employees within the organisation, play within strategy generation.

Throughout the years, the focus on actors in the strategy process has moved from the top management team, through middle managers, to employees. With an increasing recognition of the importance of involving other employees out with management in the formation of strategy, there is a move to study the range of actors involved in strategy making activities (Regnér, 2003; Angwin et al., 2009; Paroutis and Heracleous, 2013; Hautz, et a., 2017). This move is consistent with the emerging concept of ‘open strategy’ (Burgelman et al., 2018).

Open strategy is gaining some attention as a term, with some outlining the type of activities that have the most impact on the organisation. Hutter et al. (2017) found that simply inputting ideas onto an online platform was less effective than the commenting and evaluating activities involved in open strategy practices. Mack and Szulanski (2017), in their examination of opening up strategy making, provide a definition of inclusion versus participation “organizations engage in participation when they involve stakeholders in information-gathering activities such as surveys and interviews, but engage in inclusion when they involve stakeholders in work groups or task forces in which there are information sharing, interactions and joint decision-making among members”. (pp. 386). Hautz et al. (2017) also provide an analysis of openness and discuss it in relation to the degree of inclusion and transparency provided in the strategy making process. In open strategy literature there seems to be a typology emerging between participation, transparency and inclusion. We adopt the same definitions in our research, with transparency referring to the amount, or degree, of information shared with various organisational actors; participation being the involvement of actors in information gathering activities and inclusion being involvement in decision making activities.

Jarzabkowski (2004) highlights the tensions between recursive and adaptive practices saying that adaptive practices allow “knowledge-creating cultures or learning organizations are characterized by the ability not only to hold multiple interpretations simultaneously, but to incorporate them into the strategy process (Huber 1991)... Firms are, therefore, more prone to

adaptive practice when they are populated by diverse and heterogeneous communities. However, there are structural and processual considerations if these communities are to be integrated into the strategy process (Van Looy et al. 2001).” (pp. 538-9). These multiple interpretations are difficult for organisations to manage and we would argue that the process and tools required to work within these adaptive practices need to be inclusively designed but also need to be able to deal with multiplicity perspectives. Thus, the design of the tools and the way the information can be interrogated are important to developing and sustaining adaptive practices with a diverse body of organisational actors.

Burgelman et al. (2018) outline that with the increasing prominence of information technology tools, information technology can be expected to play an increasingly important role in the strategy processes of firms to enable transparency, participation, or inclusion in strategy processes. The use of information technology tools in strategy processes represents an important, largely untapped topic area for future research (Baptista, et al., 2017). The use of electronic tools within the participative and inclusive activities of strategy making are themselves central to the traceability and management of a more open approach to strategy. By understanding the role these tools play in developing participative and inclusive strategy we can begin to understand more fully the dynamics of transparency, participation and inclusion (Feldman and Pentland, 2003; Mack and Szulanski, 2017; Wolf and Floyd, 2017).

Hautz et al. (2017) say that “most research on Open Strategy has concentrated on the particularities of the strategy process but little attention has been paid so far on the way in which Open Strategy affects the content of strategy.” (pp. 307). They outline a tension of quality of the strategic content, the tension between a better strategy due to a wide range of perspectives (Stieger et al., 2012) versus a weak strategy due to the overwhelming nature too many ideas (Huber, 1990). So far the literature on open strategy has provided little explication on the design of the process and activities in inclusive strategy making and the resulting strategy developed.

While there are a number of studies highlighting the benefits of openness in strategy making, others draw attention to the limitations with participation in management processes (Ashmos et al., 2002; Collier et al., 2004). In fact Hautz et al. (2017) in their examination of open strategy identify a set of dilemmas of open strategy, as outlined in figure 1.

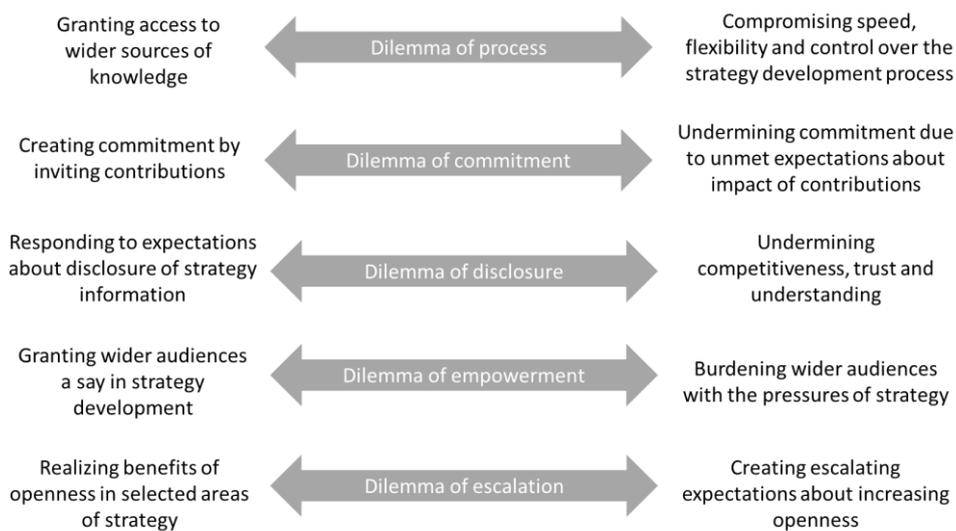


Fig. 1 - Central dilemmas of open strategy. Hautz et al. (2017:302)

The debate on open strategy has conceptual underpinnings in involvement, participation and inclusion studies. But the dilemmas give a false impression that openness is either one extreme or another, while we argue that participative and inclusive processes are actually a complex set of activities and interactions of various organisational actors. We will reflect on these dilemmas in relation to our findings in order to provide a more nuanced discussion on the dynamics of participation and inclusion in strategy making and what impact these dynamics have on the content of the resultant strategy.

Methodology

The methodology is based on the engaged scholarship approach (Van de Ven, 2003), which is concerned with the co-creation of research with the members of the case organisation. We were afforded a unique opportunity to be involved in the strategy making process of an organisation. Thus, we adopted an action research approach to the methodology. This allowed the research to be designed and performed in a participatory fashion, with various levels of employees being involved in the design of the activities, including the data collection and analysis methods.

Research context

The organisation where this research was conducted was Children's Hospices Across Scotland (CHAS). CHAS is the only charity in Scotland that provides vital hospice services for children and young people with life-shortening conditions. They offer care for the whole family in two children's hospices, Rachel House in Kinross and Robin House in Balloch. They also run a homecare service called CHAS at Home helping families in their own homes across Scotland. This means that CHAS has many diverse stakeholders. The design of this inclusive process meant that all stakeholders would be involved, including the children and young people CHAS cares for. This was a challenging aspect of the project, as some children and young people who have complex disabilities are unable to speak, also discussing the future with children and young people who are nearing the end of life had to be done in a sensitive manner.

CHAS approached the University for help with the process as they recognised that they wanted an approach which was inclusive and representative of their various stakeholders. The University brought in a partner consultancy who have specialised technology which would allow the facilitation of a more inclusive approach to strategy making. This software is a cloud based platform which helps explore and record ideas and opinions from all participants anonymously.

Data collection

Since action research is concerned with research in action, the data collection phases of this research followed the same phases as the strategy making process. The strategy making process can be split into three phases: first, an initial reflection stage; second, the strategy making workshops, interviews and facilitated play sessions; third, the board meeting where the statement of strategic intent and strategic initiatives were presented and discussed. The overview of the strategy making process is seen in Figure 2.

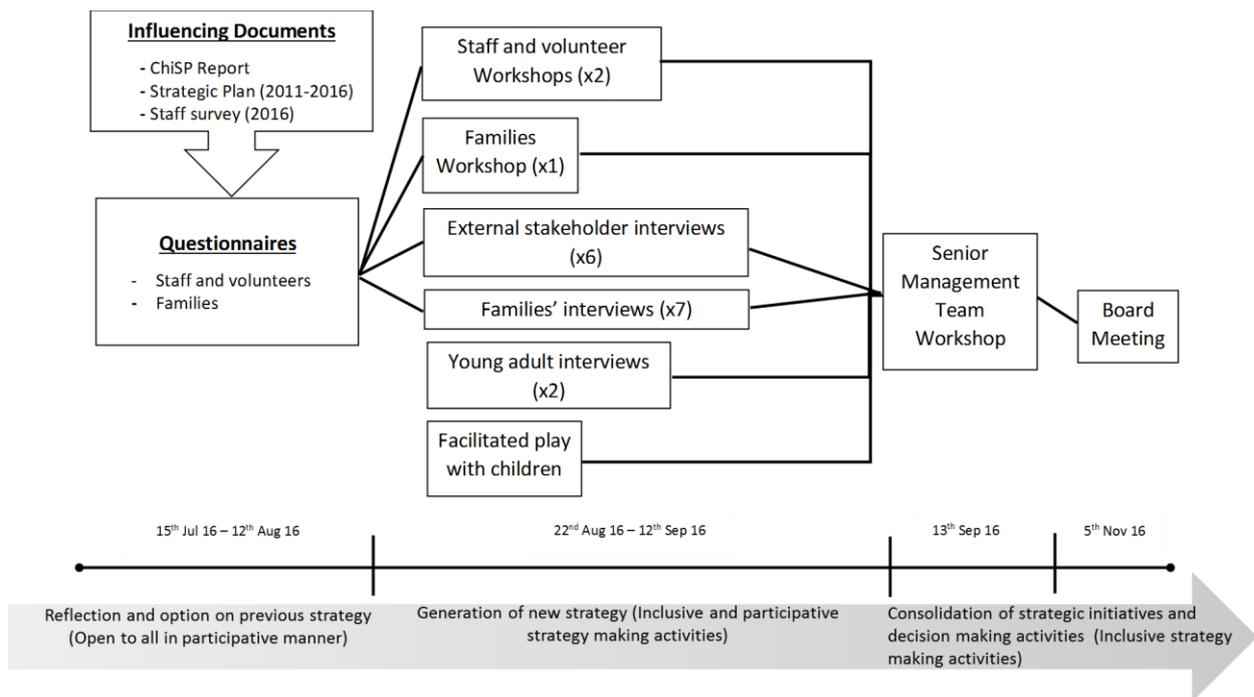


Fig. 2 – Overview of the strategy making process for CHAS

First there was a pre strategy development survey which was sent out to all employees, volunteers and families associated with CHAS. The aim of this was to reflect upon the previous strategy and gain some insight into what strategic priorities from the previous strategy are still important and what progress has been made on them. Participants were also asked ‘What should CHAS be doing more of in the next 3 years?’ and ‘What should CHAS be doing less of in the next 3 years?’ this was to allow a broad range of ideas to be collected. The questionnaire was administered and results collected using the electronic tool. The results from the questionnaires were used to facilitate the strategic discussions in the next phase of the strategy making process.

Second, was the facilitation of the inclusive strategy making process through the use of the electronic tool. Participants self-selected for involvement in the workshops and were given very little guidance on what was expected of them in the workshops. This approach is underpinned by the belief that by engaging with as many staff, volunteers and families connected with CHAS as we can in an open, collaborative manner we have the best opportunity to develop better strategy. Participants were told “*You do not need to prepare for the session – your experience and expertise is your preparation. When we begin we will ask questions and through a mixture of whole group conversation, working in smaller groups and individual actions we hope to capture what you really think and believe about how we can attempt to build the best future for CHAS and the people it touches.*” In the workshops we asked the simple question of ‘What actions should CHAS undertake in the next 3 years?’ the ideas were inputted into the electronic tool by the participants, these ideas were then rated and ranked by importance and urgency using the functionality in the electronic tool.

A series of interviews were also undertaken with families who could not make the workshops, young adults who were current and previous users of the CHAS service and a number of key external stakeholders were also interviewed. In these interviews we asked the following questions:

1. What do you like about CHAS?
2. What would you like CHAS to do that they don't already?
3. What does CHAS do that is better than anyone?
4. What could CHAS do better?

The results from the interviews were written up and inputted into the electronic tool to allow all the data collected to be available prior to the senior management team workshop.

Third, was the presentation of the statement of strategic intent and the strategic initiatives/priorities which was to gain the buy in from the board of trustees. In this phase of the strategy making process we presented the outputs from the inclusive activities and gave the board an overview of the content of the developed strategy. We collected their responses to the initial strategic content to understand if the content was relevant and robust to take forward.

Table 1 details the number of participants involved at each stage of the strategy making process.

The recording of research data was mainly done through field notes written as close to the moment as possible, reflection notes were also written up after the day in the field. These notebooks provide the foundation for the data collected during this research. Interviews (formal and informal) with stakeholders were also noted in notebooks. Interviews focused on how the process was being experienced by them and also asked them to reflect on previous strategy making processes to make some comparison to their previous experiences. Outputs from the workshops were collected using the electronic tool. This resulted in every input from stakeholders to be recorded.

Table 1 – Activities and number of participants in the strategy making process for CHAS

Activity (strategic episode)	No. of Participants (actors)
Questionnaire to staff and volunteers	Open to all staff and volunteers
Questionnaire to children and families	Open to all staff and volunteers
Strategy workshops using an ICT package with staff and volunteers	34 members of staff 5 volunteers
Strategy workshops using an ICT package with families	7 families
Strategy workshops using an ICT package with senior management team	10 senior managers
Interviews with external stakeholders	6 key external stakeholders (i.e. Scottish Government, NHS, Social Work, Charity Funding Organisations)
Interviews with children and families	7 families (4 currently using CHAS and 3 bereaved families)
Interviews with young adults	2 young adults (1 who still uses CHAS and 1 who no longer uses the service)
Facilitated play with children	6 children were involved while in respite care in hospice
Presentation of Statement of Strategic Intent and Strategic Priorities to Board	8 board members

Data analysis

Burgelman et al. (2018) discussed *strategy formation and strategic issues* (from the process tradition) and *strategizing episodes and practices* (from the practice tradition) as well as *actors* in their attempt to combine Practice and Process strategy research into a combined approach named Strategy as Process and Practice (SAPP). Thus, we analysed the data using a narrative analysis to help us understand what activities were selected and why, but also how they linked together to form strategy. We also analysed the activities with regard to the impact they had on participation (i.e. who was involved) and inclusion (i.e. how they were involved). We are interested in the design of the activities and how they affect participation and inclusion, but we are also concerned with the affect this has on the content of the strategy developed. The arguments for a participative and inclusive strategy making process is that there is greater buy-

in from the various stakeholders of the organisation, one of the reasons for this is due to all voices to be considered equally. Thus, we think it is important that the participants' actual words are used in the formation of the strategy content. In order to do this we have traced particular words or phrases back from the published statement of strategic intent and strategic initiatives through the various 'input' stages of the process to show that an open, participative and inclusive strategy making process is traceable which leads to a more authentic strategic content. For the purposes of this paper we have traced only two terms 'sparkle' and 'reach' as these are central to the new CHAS 2020 plan.

Findings and discussions

Process of participation and inclusion in strategy making

Our findings show that participation and inclusion are not mutually exclusive and it can often be difficult to distinguish participative activities from inclusive activities. It also shows that openness moves, shifting during the flow of the strategy making process, opening and closing as the process progresses, Table 2 shows the link between the activities and the effect on openness.

Table 2. – Activities of the process and the effect on openness

Activity (strategic episode)	Rationale	Effect on openness
Questionnaire to staff and volunteers	CHAS covers the whole country of Scotland and has dispersed members of the organisation who could not attend a strategy workshop. The rationale for this stage was to get people within the organisation to think about strategic initiatives and reflect on current progress.	Increases the potential for participation from the widest number of organisational actors. Allows members of staff and volunteers who are geographically dispersed to have their opportunity to reflect on the old and new strategy. Allows actors to be involved in the strategy making activities without feeling the need to fully engage with the workshops. This is the most open phase of the strategy making process.
Questionnaire to children and families		
Interviews with external stakeholders	The rationale for this activity was for the views of key external stakeholders to be included in the new strategy. This was to capture how CHAS was viewed in their external environment.	Increases the participation of actors who want to have a discussion about strategic issues. This is less open than the questionnaires, with less actors due to the time consuming nature of individual interviews. The interviews were strategic discussions which allowed rich understanding to emerge with regard to issues, ideas and potential priorities.
Interviews with children and families	The rationale for this activity was that not all children and families could attend the workshops but still wanted their opinions to be included in the development of the new strategy.	
Interviews with young adults	The rationale for this activity was that the views of young adults were not being captured through the other activities.	
Facilitated play with children	The rationale for this activity was to capture the thoughts and ideas of the children who CHAS cares for. Play was used as a way to engage the children. Also some of the children included in this activity were non-verbal and so communication through play allowed them to express what they liked about CHAS.	Prior to this inclusive strategy making process the children had never been included in organisational development activities. Openness and flexibility in the design of the process allowed for different types of strategic artefacts to be included in the making of the strategy. The number of actors was less than the workshops but the activity was designed to be inclusive and engaging.

Strategy workshops using an ICT package with staff and volunteers	The rationale for this activity was to get a wide range of different views to input into the electronic tool anonymously. Also facilitating strategic discussion in the workshops using the outputs of the questionnaires. Strategic initiatives were also rated and ranked in these workshops so participants were making decision on what CHAS should do in the next three years.	The number of participants for this was much less than the questionnaire but were still self-selecting. The reduced number of actors was beneficial in the management of the process. These workshops generated hundreds of ideas and potential strategic initiatives. This was a more inclusive activity as actors were expected to give their opinion on what should be done, through anonymous voting. This resulted in the desired future state objectives emerging from these workshops. These activities were less open and had less participants but were more included and involved in the process.
Strategy workshops using an ICT package with families		
Strategy workshops using an ICT package with senior management team (SMT)	The rationale for this workshop was to build upon the previous work of the strategy process to come to a decision on the strategic initiatives that CHAS is taking forward. Using all the information the SMT were able to develop their own strategic priorities using the words of the other actors or their own.	This activity was less open with only the senior management team involved. The workshop was inclusive in its design in that all actors in the workshop were given equal voice due to the anonymous nature of the tool. The difference with this workshop was that the participants had the outputs from the other strategic activities to help with their decision making.
Presentation of Statement of Strategic Intent and Strategic Priorities to Board	The rationale for this activity was to test the content of the emerging strategy. The purpose was also to gain buy-in from the board to continue to develop the strategic initiatives.	This activity was the least open of the activities in the process since only board members were involved.

Our findings can be considered in light of the dilemmas of openness (Hautz et al., 2017), it is not our objective to solve the dilemmas but to explore the findings of our case within these conceptual boundaries.

Dilemma of process

The use of an electronic tool allowed this dilemma to be solved to some extent, looking back at Figure 1, we can see that the strategy formulation process has taken a little under four months. The flexibility in the design of the process and the flexible functionality electronic tool actually allowed for a speedier process. This was exemplified through the Associate Nurse Director saying that *“it felt faster and easier than before which made us feel like we weren’t doing it right”* this however throws up another issue about the idea that strategy need to feel ‘difficult’ or ‘hard’. Without the use of the electronic tool the strategy making process in this case would have taken a longer time, in addition there would be data management issues to deal with due to the large volume of ideas, issues and priorities put forward. The control over the process is something that is challenging for the senior management of an organisation and there is an element of trusting the process, however in our case the decision making responsibility still lay with the senior management team. The dilemma here could also be affected by the actors understanding of openness, from our research we have seen that openness is not an all or nothing concept but can have degrees of openness.

Dilemma of commitment

The potential impact of the contribution from the participants was managed through the procedural rationality built into our process which allowed expectations of participants to be managed to some extent. The process was clearly outlined to the whole organisation in the hope of transparency of how their ideas would be used. The electronic tool allowed for voting and prioritisation to take place (within both the questionnaire and workshops). The fact that each idea was considered in the workshops and in the SMT workshops negates some of the commitment dilemma. However, the SMT did note that the 'big book' (i.e. all of the ideas generated from the workshops) of ideas was overwhelming but were in agreement that it gave more voice to the people involved and so it became a key strategic artefact.

Dilemma of disclosure

This dilemma is perhaps more important when the strategy making occurs across organisational boundaries within profit based organisations. There were no issues of secrecy or transparency about information within our case. Since the disclosure of information was not raised as an issue through the strategy making process in this case.

Dilemma of empowerment

It is widely known from studies in employee relations (Bolton and Houlihan, 2005; Boxall and Macky, 2009) that empowerment is a nuanced concept that can result in increased stress for lower level of employees when faced with the challenge of being empowered to take part in activities that they do not feel comfortable with. In our case this dilemma was lessened through a self-selection process. The electronic questionnaire and participation in the workshops was completely self-selecting. While there is an issue here in that the actors who have time pressure or who think they do not have anything to contribute will not choose to take part in self-selecting activities, which can result in unrepresentative views being included in the strategy making process. The self-selection method also can result in the 'usual suspects' taking part in the strategic episodes which can reduce the breadth of ideas for strategic content, as Newman and Nobel (1990) draw attention to the issue of 'pseudo' involvement, where only the compliant are selected for involvement activities

Dilemma of escalation

While this is a concern about all management processes being opened and the risk this poses to organisational control and management power, the way an inclusive process is designed and the way the activities are communicated (i.e. level of transparency) is important to resolve some of this dilemma. By setting out clear expectations allows people to be included, there is an issue here about transparency and what happens with information once it has been collected. Communication and transparency surrounding the strategy making process gives participants (organisational actors) a clear understanding of openness. This in conjunction with ensuring the process is designed on a foundation of procedural rationality can ensure that there is little concern about escalating expectations about increasing openness.

While this paper has only focused on the time period to the creation of the statement of strategic intent and the strategic priorities, the research extended beyond this and the model in Figure 2 shows that the participative and inclusive activities shifted again once the strategic initiatives needed developed. In CHAS each member of the SMT took responsibility for a particular strategic initiative but this was then opened up to other actors to be included in the development of what these initiatives should look like. Once the detail of the initiatives were

decided a smaller, less open team developed the project plans. However, once the plan was agreed the strategic plan was then disseminated to all the organisational actors for discussion and reflection.

What figure 2 shows is that participation and inclusions, that is openness moves and shifts in a natural way through the strategy making process. Thus, our research shows that a strategy making process which is designed to be inclusive opens and closes to varying degrees throughout the strategy making process.

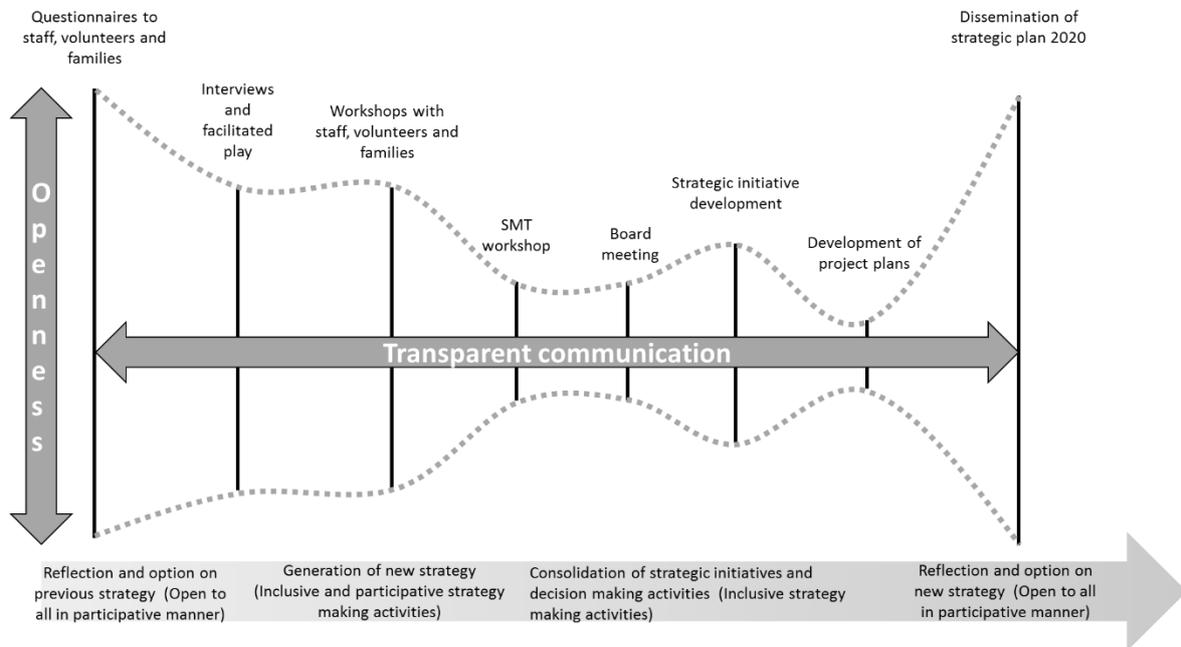


Fig 3. Movement of openness through the strategy process

Content of strategy

It has been noted that there is a lack of research into the affect an inclusive process has on the content of the strategy (Mack and Szulanski, 2017), our findings have shown that an inclusive process can allow for the content to be authentic.

In our case we have taken just two examples the terms ‘reach’ and ‘sparkle’ to track through the process. In the example of ‘reach’, it can be seen that the terms ‘Reach more children’ was voted the most important strategic priority from the staff and volunteers workshops. Figure 4 shows an extract from the workshop outputs.

Objective [Description of Future State]	Voting Score	Objective [Description of Future State]	Voting Score
Reach more children	8	Invest in technology, but make sure that the external lines can cope with the increase in use	7
Look to ensure the North of Scotland can be better engaged from a care and a fundraising point of view	8	Develop a culture which supports the development and independence of young adults 16+	7
Ensure that all of CHAS understand our core vision and values	8	The right people around the table able to effectively supply and cascade the information to their own teams	7
Ensure that all at CHAS understand how we are funded and the part they play	8	We are aware of all individual and team roles and their challenges.	7
Ensure all clinical practice is best practice	8	Families have a greater choice and access to home support across Scotland.	7
Develop the culture within CHAS to ensure all staff and volunteers are forward facing, feel supported and excited by the prospect of working for an evolving organisation	8		

Fig. 4 – Extract from staff and volunteer workshop outputs

After further development and inclusion of ideas from the senior management team and board members, this was incorporated into the plan as a key strategic priority as shown in Figure 5.

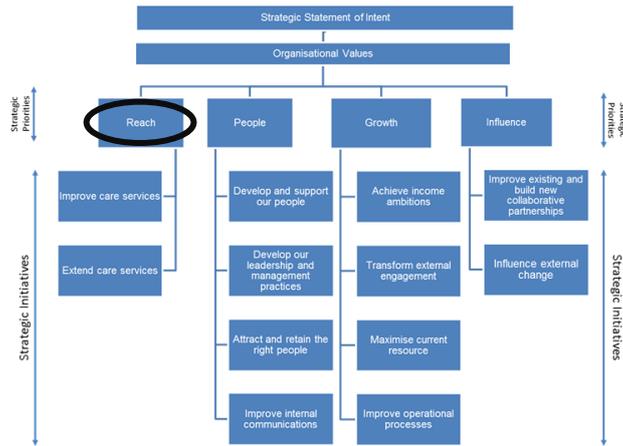


Fig 5. – Plan outline for CHAS 2020

This shows that the ideas and strategic vision from the staff and volunteers was taken as a key strategic priority. This strategic priority is also shown in the strategic targets set by CHAS as part of their 2020 plan as seen in Figure 6. So an idea that was suggested in a workshop by an individual but gained consensus through the process of inclusive decision making resulted in it being the central focus for the CHAS strategy.



Fig.6 – CHAS 2020 infographic

While the electronic tool allowed the staff and volunteers, as well as families, to input directly into it, it was difficult to work with the children with the electronic tool directly. To overcome this we worked with the specialised play teams within the hospices who, through playful episodes, elucidated what the children liked best about spending time with CHAS. This resulted in a series of outputs such as pictures, as seen in Figure 7, the word ‘sparkle’ is circled to show that it had come directly from interacting with the children.



Fig 7. Output from facilitated play session with children at the hospices

The outputs of the facilitated play sessions were inputted into the electronic tool too, so that all the inputs from the various sources were stored within the tool. The words from the children also emerged through the process and in our example the word ‘sparkle’ can be clearly seen within the statement of strategic ambition published by CHAS as one of their final strategic outputs, in their CHAS plan 2020, as seen in Figure 8.

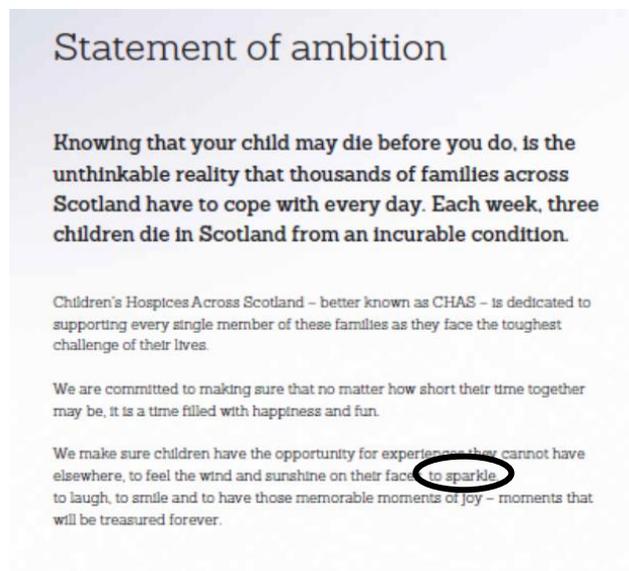


Fig. 8 – CHAS statement of strategic ambition

The use of an electronic tool allowed the traceability of the words of the participants which adds to the trustworthiness of the process. The electronic tool allowed for people to input their ideas in their own words and to allow the words to be stored and retained. Resulting in those specific words to be used throughout the whole process, without the tool and the functionality of easily tracing back to the words. It would appear that a participative and inclusive approach

to strategy making results in a content that allows a variety of stakeholder voices to be heard and seen within the resulting formalised strategy.

Reactions to the content of the strategy have been largely positive, and most of the comments have been focused on the impact the participation and inclusion of staff, volunteers and families have had on the final strategic plan, as shown by the comment made by the CEO:

“I have been humbled by the voices of families, staff and volunteers and the impact they have brought to this plan.” (CEO)

There was also some surprise since precise ideas and suggestions brought up in the workshops had survived the strategy making process and were eventually strategic initiatives in the overall plan:

“The most exciting part for me is sitting in those family workshops in Robin House and seeing that what they asked for has been carried through to our plans.”
(Executive Support Manager)

Both the CEO and Executive Support Manager were central actors in the strategy making process and were central champions of the participative and inclusive nature of the process but both were surprised at how strongly the voices came through in the final strategic plan.

The initial statement of strategic intent was presented at a board meeting to allow them to see the outputs of the process and the emergent content of the strategy. The board members, up to this point, were not involved in the workshops so they were used as a ‘sounding board’ for the content of the potential strategy. When the statement was presented to the board their reactions were again largely positive, with some of the initial SSI reactions from the CHAS board focusing on the authenticity of the strategy:

“It feels authentic” (Board Member 1)

“This feels like CHAS” (Board Member 2)

“Love the sentence with the ‘sparkle’ in it, it feels like us” (Board Member 3)

It would appear that through our analysis of the process and the content that designing a strategy making process and having participative and inclusive activities can result in a more authentic strategy. However, the role that the electronic tool played in the process is central to the success of capturing and retaining the actual voices of the people involved.

Conclusions

It is generally accepted that strategy exclusively made by the senior management team can have difficulties in achieving buy-in and can fail in execution, and there is a growing realisation that the strategy process should be more participative and open up to a wider range or organisational actors. While there is emerging research in this area, there is a lack of understanding on the role activities play, who the actors are and what supporting tools are required. This research has examined the effects of participative and inclusive activities have on the opening up of the process as well as the content of the strategy made.

We find that inclusion is not a binary concept, but has varying levels and degrees. From our study we show that inclusion shifts, expanding and contracting with the natural process of making, developing and implementing strategy. Our research also shows that a more open process of making strategy results in strategic content which is authentic with the voices of

many different organisational actors. However, our research stresses the importance of electronic tools which can capture and retain the voices of these organisational actors. We have sought to discuss our findings within the dilemmas of openness (Hautz et al., 2017) to expand the theory in this area. The dilemmas allow us to examine openness in a more nuanced way but we also show that a senior management team that believes in inclusivity, a well-designed activity structure, a tool which enhances inclusive activities and stream of communication throughout the process can manage the dilemmas of openness.

Our findings contribute to the developing theory in the area of participation, inclusion and openness within strategy. We have opened up the specific activities in an inclusive process of strategy making to look at the actors involved and the effect this has on openness. We have also started to unpack the impact electronic tools have on the strategy making process and show that a good electronic tool can help manage the dilemmas of openness. Our research also makes some contribution to understanding the effect openness has on the content of the strategy, we have shown that the content of the strategy appears to be more authentic to the organisation when the process is designed in an inclusive way.

Our research has focused on one specific organisation, and one which could be argued is more predisposed to being open due to their emotive purpose, it would therefore be useful to explore this type of engaged scholarship in other types of organisations. We have also followed a particular design of process and have used a proprietary electronic tool to develop the strategy so it would be interesting to see how different strategy activities and tools can be used in a more open way.

Some authors stress that inclusive working practices are a moral concern for organisations and there is a move in practice for openness but organisations are often unsure about how to do this. Organisations are often uncertain about the impact openness in their business processes will have on their business, but we have shown how participation and inclusion can be used to varying degrees and at different times in the strategy making process, it does not have to be an 'all or nothing' process in order to have significant results on the content of the strategy.

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