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## Middle Managers' Struggle Over Their Subject Position in Open Strategy Processes

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**ABSTRACT** In this paper we examine middle managers' struggle over their subject position as strategists in the context of participative strategy processes. Based on a longitudinal case study of a company undertaking an Open Strategy process, we show how the wider inclusion of front-line employees in developing new strategy undermines the traditional subject position of middle managers. Based on these findings, we develop a process model depicting the recursive dynamics of middle managers' struggles to maintain their subject positions in the face of employee participation. With these findings we contribute to the literature on middle managers by advancing our understanding of the implications of employee participation for middle managers' subject position as strategists and their different ways of reclaiming their subject position. We also contribute to the literature on Open Strategy by revealing the implications for traditional strategy actors as well as by explaining the processual dynamics of participation over time.

**Keywords:** middle managers, open strategy, subject position, widening participation

## INTRODUCTION

While the 'traditional' strategy process, which is 'traditionally exclusive [and] normally regarded as secret' (Whittington et al., 2011, p. 535), assigns clear strategic roles to top managers, the middle managers, defined as 'managers located below top managers and above first-level supervision on the hierarchy' (Wooldridge et al., 2008, p. 1192), tend to lack such clearly assigned strategic roles (Jarzabkowski and Balogun, 2009; Laine and Vaara, 2007; Mantere, 2008). Hence, middle managers actively construct such roles, often referred to as their 'subject position' in terms of their sense of identity and social agency as strategists (Laine and Vaara, 2007; Mumby and Clair, 1997), through the

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enactment of strategic activities (Knights and Morgan, 1991; Laine and Vaara, 2007), that is, through performing activities that are aimed at influencing the strategy process.

The middle manager literature elicits a wide a range of strategic activities with which middle managers construct such subject position as strategists; these activities are either directed at influencing upward (Balogun and Rouleau, 2017; Floyd and Wooldridge, 1992; Rouleau, 2005) or influencing downward (Floyd and Wooldridge, 1992; Huy, 2002; Sharma, 2017). However, as several studies have shown, middle managers are often faced with challenges in enacting such strategic activities resulting in a struggle to construct themselves as strategists (Laine and Vaara, 2007). For example, middle managers are often side-lined in the strategic conversation (Westley, 1990), are relegated to mere implementers of pre-defined strategy (Jarzabkowski and Balogun, 2009) or face inconsistent expectations and cues from top managers and other key stakeholders (Currie and Procter, 2005; Floyd and Lane, 2000; Thomas et al., 2011).

With the recent trend to more widened participation in strategy development, sometimes referred to as ‘Open Strategy’ (Hautz et al., 2017; Seidl et al., 2019; Whittington et al., 2011), middle managers’ struggle over their subject position is likely to be complicated further. Aimed at improving the quality of strategic decisions and increasing buy-in and commitment in their execution (Matzler et al., 2016; Stieger et al., 2012; Whittington et al., 2011), many organizations have started to open up their strategy-making processes to wider employee participation, which is likely to also shape the possibilities for middle managers to enact their strategic activities and thus to claim their subject position as strategists. For example, research has shown that widened participation tends to change the locus of control over strategy processes (Hautz et al., 2017; Matzler et al., 2014), which potentially impacts middle managers’ ability to enact activities by either expanding or constraining their access to the locus of control and influence over the strategy process.

In spite of the growing literature on Open Strategy, we still know very little about the concrete ways in which such widened participation affects middle managers’ struggles over their subject position as strategists. We do not know to what extent it constrains or improves middle managers’ attempts to construct themselves as strategists and thus whether it eases or aggravates their struggles. This is an important oversight given the importance of middle managers in the strategy process, not least for ensuring goal congruence between top management and strategy implementation (Floyd and Wooldridge, 1997; Huy et al., 2014; Ketokivi and Castagner, 2004; Vilà and Canales, 2008). Accordingly, our paper asks the following research question: *How does widened participation in strategy making affect middle managers’ struggles over their subject positions as strategists?*

In order to answer this question, we draw on a longitudinal, real-time case study (Lee and Lee, 1999; Miles and Huberman, 1994) of a participatory strategy-making process within a large international financial company. In this firm, the CEO invited employees to participate in the strategy-making process and asked the middle managers to support the employees’ participation. Rather than assigning the middle managers a particular strategic role in the participatory process, they were asked, simply, to facilitate employees’ strategic activities. Our findings show that the intended participation of employees limited the middle managers’ ability to enact their strategic activities, leading to various efforts to reclaim their subject position as strategists. Initially, middle managers tried to maintain their subject position by continuing to enact their known activities of strategic

influence thereby constraining the intended employee participation. When top managers tried to ensure employee participation by prohibiting the enactment of middle managers' activities, the middle managers' tried to reclaim their subject position by performing their strategic activities clandestinely or by encroaching on the strategic activities of other strategy actors. We develop our findings into a conceptual process model that explains the recursive dynamics through which middle managers struggle to reclaim their subject position as strategists when efforts at widening participation from other actors, such as employees, impinge upon that subject position.

With these findings our study makes four key contributions to the literature on middle managers and Open Strategy. First, our study elaborates upon the constraints against which middle managers struggle to construct their subject position as strategists (Burgelman, 1994; Currie and Procter, 2005; Floyd and Lane, 2000; Huy, 2011; Jarzabkowski and Balogun, 2009; Laine and Vaara, 2007; Thomas et al., 2011; Westley, 1990). We show how employee participation in strategy making in our case undermines the middle managers' possibilities for enacting their known strategic activities, whilst also failing to allocate them new strategic activities. We explain why this way of widening participation exacerbates middle managers' struggles, as they are not just resisting the assignment of a new role (e.g., Barley, 1986; Jarzabkowski and Balogun, 2009), but rather struggling to find new ways of maintaining their subject position as strategists. Second, our study contributes to a better understanding of the specific ways through which middle managers construct their subject position (Balogun and Rouleau, 2017; Dutton et al., 2001; Floyd and Wooldridge, 1992; Huy, 2002) by identifying an expanded repertoire of activities through which middle managers attempt to influence strategy making. Third, our study contributes to a better understanding of the inevitable closure of Open Strategy processes (Dobusch et al., 2019; Hautz et al., 2017; Luedicke et al., 2017) by elaborating on how the participation of one group of actors tends to undermine the participation of others. That is, opening up the strategy process to employees is not possible without closing it somewhat down for the middle managers. Fourth, our study sheds light on the effects of widened participation at multiple organizational levels (Hautz et al., 2019; Splitter et al., 2019) by showing that even when the intention is to increase participation, it remains challenging to enable participation at multiple organizational levels simultaneously. In doing so, our paper contributes to a better understanding of the dynamics of widened participation over time (Dobusch et al., 2019; Gegenhuber and Dobusch, 2017; Mack and Szulanski, 2017) by showing that who participates, when, and how is constructed within shifting patterns of activities to influence the strategy process.

## LITERATURE REVIEW

In the traditional strategy-making process, which can be defined as exclusive and secret (Seidl et al., 2019; Whittington et al., 2011), managers at the top of the organization are in charge of setting the direction of the firm while employees at the other end of the hierarchy are expected to enact these directions (Burgelman, 1994; Whittington et al., 2011). While this traditional strategy-making process assigns clear

strategic roles to the top managers and operational roles to those at the bottom, middle managers tend to lack clearly-defined strategic roles (Burgelman, 1994; Jarzabkowski and Balogun, 2009; Laine and Vaara, 2007; Mantere, 2008; Westley, 1990). Drawing on Knights and Morgan (1991), Laine and Vaara (2007) highlight that middle managers, therefore, construct their 'subject position' as strategists, which is defined as their sense of identity and social agency in the practice of strategy (Dameron and Torset, 2014; Laine and Vaara, 2007; Mumby and Clair, 1997), by continuously enacting strategic activities, that is, activities aimed at influencing the strategy-making process. Because of the fragile nature of these strategic activities, as compared to clearly defined strategic roles, middle managers are in a constant struggle 'precisely to protect or enhance their social agency or identity' as strategists (Laine and Vaara, 2007, p. 28). This struggle is important because their 'sense of meaning and reality becomes tied to their participation in the discourse and practice of strategy' (Knights and Morgan, 1991, p. 252). Thus, in order to understand the subject position of middle managers in the strategy process, we have to examine the very activities through which they aim to influence the strategy process.

The middle manager literature lists a wide a range of different activities through which middle managers construct their subject position as strategists. In their seminal papers, Wooldridge and colleagues (Floyd and Wooldridge, 1992; Wooldridge et al., 2008) show that middle managers champion strategic ideas to construct their subject position, which involves upward influence by presenting new strategic alternatives that have the potential to reshape top management's concept of strategy. Similarly, Dutton and Ashford (1993) highlight that middle managers engage in issue-selling activities, which involve packaging or framing strategic issues, shaping the selling process, and determining the timing of the selling effort (Dutton et al., 1997, 2001). These issue-selling activities allow middle managers to adopt a subject position as strategists by influencing which issues come to the attention of top management. Moreover, Rouleau and her colleagues showed that middle managers engage in upward influencing through sensemaking and sense-giving (Balogun and Rouleau, 2017; Hope, 2010; Rouleau, 2005; Teulier and Rouleau, 2013). In addition to such upward influencing, various studies have also shown that middle managers construct a subject position as strategists by engaging in activities of downward influence. This involves encouraging subordinates to engage in idea generation; for example by increasing information sharing and learning of organization members (Floyd and Wooldridge, 1992; Sharma, 2017; Wooldridge et al., 2008) as well as activities of strategy implementation (Floyd and Wooldridge, 1992). Huy (2002), for example, describes how middle managers construct their subject position as strategists by helping employees make sense of, and cope with, new strategies in order to facilitate strategy implementation. Generally, these studies show that middle managers perform a range of strategic activities that allow them to actively construct their subject position as strategists.

However, several studies show that middle managers often struggle to enact such activities aimed at influencing the strategy process, and thus to construct themselves as strategists (e.g., Glaser et al., 2016; Hope, 2010; Izraeli, 1975; Laine and Vaara, 2007; Rouleau, 2005; Thomas et al., 2011). For example, Huy (2011; 2014) shows that if middle managers' influence on strategic change gets restricted, they become emotionally disaffected from the strategy process. In a similar vein, Jarzabkowski and Balogun

(2009) showed how a strategic planning system relegated middle managers to strategy implementers and thereby reduced their ability to influence the strategy process. Others (Currie and Procter, 2005; Floyd and Lane, 2000; Thomas et al., 2011) demonstrated how middle managers struggled to enact a strategic role due to inconsistent expectations and cues from top managers and other key stakeholders. Some studies have also shown that even when middle managers are formally invited to participate in strategy making, they might still struggle to perform strategic activities aimed at influencing the strategy process and thus fail to construct their subject position as strategists (Mantere, 2008; Westley, 1990). This might be due to the fact that other actors do not accept middle managers as strategic actors (Mantere, 2008) or because middle managers are side-lined in the strategic conversations (Westley, 1990).

The recent trend towards more inclusive strategizing processes, often referred to as 'Open Strategy' (Hautz et al., 2017; Seidl et al., 2019; Whittington et al., 2011), may further complicate middle managers' subject position as strategists. As various studies have documented (Aten and Thomas, 2016; Baptista et al., 2017; Denyer et al., 2011; Dobusch and Kapeller, 2018; Gegenhuber and Dobusch, 2017; Hutter et al., 2017; Malhotra et al., 2017; van den Steen, 2018), many organizations have started to widen participation and to include organizational members across all hierarchical levels or even external actors in their strategy processes. Including these additional actors in the strategy process is purported to improve the quality of strategic decisions and increase buy-in and commitment in their execution (Matzler et al., 2016; Stieger et al., 2012; Whittington et al., 2011). Apart from the purported benefits, creating more inclusive strategy processes changes the practices of strategy making and thereby is likely to affect – in a constraining or enabling way – how middle managers carry out their strategic activities. For example, Open Strategy might affect middle managers' construction of their subject position as strategists not only through increasing the diversity and number of participants but also through the introduction of new technologies. The introduction of digital technologies (e.g., wikis, blogs, web-based crowdsourcing) to facilitate participatory processes, have been shown to lessen intra-organizational power effects and dominant group pressure by enabling actors to raise minority opinions anonymously (Malhotra et al., 2017). Such changes in power dynamics might provide new opportunities for middle managers to develop new ways of influencing strategy making. However, they might also erode the middle managers' own power base and, thus, restrict opportunities for upward and downward influencing. In addition, digital technologies are often employed to target a potentially unrestricted crowd (Baptista et al., 2017; Dobusch et al., 2019; Gegenhuber and Dobusch, 2017; Haefliger et al., 2011), which might result in extremely large numbers of participants. On the one hand, this might crowd out the middle managers' inputs due to the sheer number of contributions. On the other hand, middle managers might also gain influence if they are involved in aggregating, clustering, sorting and interpreting these inputs.

Independently of the chosen technology, various studies have highlighted that the larger the number of, and more diverse, the participants the more complex the strategy process (Matzler et al., 2014). In this case, top management typically loses some of its ability to control the strategy process (Hautz et al., 2017). On the one hand, this might promote middle managers' influencing activities because middle managers



are closer to top management's internal views than other employees or even the outside public and thus possess more inside knowledge to influence the strategy process upward. On the other hand, top management might try to maintain control over the strategy process by setting up carefully managed selection processes that target a smaller and more exclusive number of actors (Mack and Szulanski, 2017; Seidl and Werle, 2018). If middle managers are not included in that group of actors, they might lack the necessary access to top managers to enact their traditional influencing activities. Studies on widened participation have also highlighted that, paradoxically, participation can reduce commitment and motivation (Hautz et al., 2017; Westely, 1990), when participants realize that they are included in some but not other aspects of strategy making, such as making decisions on strategic issues (Mack and Szulanski, 2017). Such disengaged employees are likely to be less susceptible to middle managers' downward influencing activities. Alternatively, the participants' lack of motivation might also strengthen the middle managers' position, as top managers become reliant on them for mobilizing participation.

As these studies show, there are indications that widened participation affects middle managers' opportunities for enacting strategic activities of upward and downward influencing. Yet we lack studies that systematically explore these effects. Thus, we know little about how widened participation plays out in the middle managers' struggle over their subject position. Accordingly, our paper asks the following research question: *How does widened participation in strategy making affect middle managers' struggles over their subject positions as strategists?*

## METHODS

We undertook a longitudinal, real-time case study (Lee and Lee, 1999; Miles and Huberman, 1994) of a strategy-making process within a large international financial company. The strategy process was deliberately designed to be 'open' by inviting employees to actively participate in the development of the new strategy, while asking middle managers to support the employees in their strategic activities without engaging actively themselves. As such, this Open Strategy process reflects an extreme case of middle managers' struggle over their subject position as they were no longer expected to perform their known strategic activities and instead relegated to mere operational supporters of the process. Having negotiated access as non-participant observers, we could follow the activities of all participants, including the involved employees, middle managers and top managers, from the initiation of the strategy process to the production of the final strategic plan, allowing us to examine middle managers' construction of their subject position over time.

### Case Context

In order to develop a new corporate strategy for the company, the newly appointed CEO and his head of strategy set up a strategy team consisting of a personal assistant, the head of communication, and an HR officer. The CEO, in consultation with his Chairman, decided to invite front-line employees to participate in the strategy-making



process as he wanted to 'leverage [the company's] internal knowledge and expertise as [they] know our business best' (Intranet announcement). In line with that, the CEO decided to invite 40 employees to the strategy process, which he considered a 'good number in light of the main markets, and representative of the company' (interview, head of strategy). In addition to that, eleven middle managers were asked to support the participatory process. The respective middle managers were chosen on the basis of their expertise, experience, trust and flexibility. The selected middle managers were either heads of particular business units or functional areas, had an average of six years employment with the company and held either local, regional or global positions in the company (see Table I). In addition, the head of strategy asked eight internal consultants to provide assistance in moderating, facilitating and supporting the discussions (e.g., by providing strategy tools, creating slides or by collecting information).

In developing the strategy, the CEO decided that all participants should work within one of eight working groups, each focussed on a particular topic: products & services, customers, distribution, operations & technology, footprint, finance, brand & marketing and culture, capabilities & people. The employees were distributed across these eight work streams according to their preferences, functions, markets and gender. The middle managers were asked to support the working groups – with five working groups being supported by one middle manager each and three working groups being led by two. Rather than assigning the middle managers according to their particular experience in a topic area, the CEO just wanted to ensure that they had a general level of expertise.

The entire strategy-making process unfolded over 30 weeks. The schedule was focussed on the investor day, at which the CEO would present the new corporate strategy to the public. Of those 30 weeks, 20 were dedicated to the actual strategy development with the remaining time reserved for the compilation of the final strategy document in the run up to the investor day. The strategy development weeks were split into alternating 'on-site' and 'off-site' weeks. During the on-site weeks, all participants

Table I. Overview of middle managers' demographics

<i>Pseudonyms</i>	<i>Position</i>	<i>Position in the company</i>	<i>Years with the organization</i>
Maria	Chief transformation officer	Global	2
Francis	Head of Commercial NA	Regional	17
Peter	CEO partnership	Regional	–
Clarke	Head of Commercial CH	Local	5
Robin	Head of marketing CH	Local	9
Martin	Head of investments	Global	4
Barbara	COO Global life	Global	1
Nathan	Head of Life Germany	Local	6
Rose	Head of life Italy	Local	9
Marvin	Head of life EMEA	Regional	6
Isaak	Head of GI EMEA	Regional	5

came together for four consecutive days of some 10–12 hours each. Besides plenary discussions and discussions among the working group members, the middle managers held daily meetings, in which they discussed how to steer their teams. Some of the on-site weeks also included CEO meetings in which the working groups presented their ongoing work to the CEO and received his feedback. During the off-site weeks, in which the employees and middle managers went back to their normal work duties, the working group members arranged occasional conference calls to prepare for the next on-site week. In addition, the middle managers and the head of strategy held video conferences to discuss the progress of the strategy-making process. Before the final strategy was presented at the investor day, the strategy was internally announced at the ‘leadership team meeting’, to which 140 top executives from the whole organization were invited. This meeting lasted three days including presentations by the working groups, and speeches by the CEO, CFO, COO.

### **Data Collection**

We collected longitudinal, qualitative data from multiple sources (Yin, 2003). Table II provides an overview of the data. The main data source was non-participant observations of the entire strategy process. The first author spent four to five full days during each on-site week at the company observing the various meetings, participants’ discussions and interactions. All discussions and meetings were audio recorded and detailed field notes were taken. As the researcher’s presence was quickly accepted, all participants of the strategy team were willing to provide detailed information and insights concerning their strategy work. The field researcher also wrote weekly summaries, including ideas and initial interpretations, to make sense of her observations as they unfolded in the field. These observations allowed us to gain initial insight into the implications of widening participation for middle managers’ activities in influencing upwards and downwards and, thus, their challenges in maintaining their subject position as strategists.

In addition, the field researcher conducted 125 semi-structured interviews lasting between 30 minutes and 1.5 hours. All interviews were audio-recorded and either fully or partially transcribed. The interviews took place across the entire strategy process and included all eleven middle managers (on a fortnightly basis), the participating employees (at least one member of each working group on a weekly basis), the head of strategy (on a weekly basis), the CEO (once) and the internal consultants (on a fortnightly basis). The objective of interviewing all participants was to understand the strategy process from different perspectives, and to flesh out details about how and why particular activities were performed. The interviews thus allowed us to capture how participants experienced their work, including how it differed from their previous experiences of strategy work. Finally, the field researcher collected numerous documents related to the strategy activities that she observed in order to capture the temporary outcomes of the strategy process. This included, amongst others, power point slides, documents explaining the slides, notes, and drawings.

### **Data Analysis**

We focused our data analysis particularly on the middle managers’ meetings in the on-site and off-site weeks as well as all the daily, weekly and monthly CEO meetings. These

Table II. Data sources

<b>Observations</b>	<b>444.5 hours</b>
CEO meetings (n = 10)	30 hours
<i>Fortnightly meetings, generally five hours long</i>	
Middle manager meetings (n = 34)	53 hours
<i>Daily meetings, generally 1.5 hours long</i>	
Working group discussions (n = 120)	171 hours
<i>Several times a day, usually 2 hours long</i>	
Plenary sessions (n = 79)	147 hours
<i>Daily meetings with all participants, generally 1.5 hours long</i>	
Middle manager video conferences (n = 9)	13.5 hours
<i>Weekly off-site meetings, generally 1.5 hours</i>	
Leadership team meeting	30 hours
<i>Meeting to announce the strategy internally, three full days</i>	
<b>Interviews (n = 125)</b>	<b>110 hours</b>
Middle managers (n = 36)	25 hours
Head of strategy (n = 15)	16 hours
Employees (n = 42)	28 hours
CEO (n = 1)	2 hours
Consultants (n = 13)	15 hours
Others (head of communication, strategy assistant, HR; n = 18)	24 hours
<b>Documents</b>	<b>~5400 pages</b>
<i>Slides and presentations, video messages, intranet announcements, notes, drawings, annual reports</i>	
<b>Diary recordings</b>	<b>11 hours</b>
<i>Employees' own reflections about the strategy process and the working groups</i>	

meetings allowed us to track how the involved middle managers' activities developed over time, gathering indications of any changes to the subject position as they were experienced by those involved middle managers. While the field researcher mainly coded the data, the other authors served as a sounding board to discuss emerging patterns in the data and pose critical questions about the analytic procedure. This allowed the field researcher to vet her ideas through other researchers' views and to counteract the risk of going native (Corley and Gioia, 2004).

Our analysis followed an iterative approach, moving between data and theory (Locke et al., 2008; Mantere and Ketokivi, 2013). Overall, the steps were not linear but formed a 'recursive, process-oriented, analytic procedure' (Langley, 1999; Locke, 1996, p. 240) that continued until we had a clear grasp of the theoretical relationships. In a first step, we wrote a rich chronological case story of the entire strategy process (Geertz, 1983; Langley, 1999), paying particular attention to how the middle managers' involvement in the Open Strategy process unfolded. Initially, we started with the data from the middle managers' meetings, as these were weekly meetings that allowed us to gain an overview

of the whole process, maintain chronological order and build an overarching story of the middle managers' involvement in the strategy process, which we then extended to the other parts of the data set, such as other meetings, interviews and field notes. As we examined the data, we found that the involved middle managers continuously struggled over their subject position. Furthermore, they referred to these struggles in relationship to their experiences of widening participation on their ability to perform their known strategic activities.

In a second step, we returned to the meeting and interview transcripts, undertaking a first-order, open coding of all the activities relating to the involved middle managers' subject position. This step resulted in a list of first-order concepts (van Maanen, 1979), i.e., a simple description of the middle managers' activities based on the language used by the informants. For example, we coded activities such as rehearsing strategy presentations with the employees, steering employee discussions, instructing employees how to generate ideas, intervening in discussions with the CEO, etc. We then clustered these empirical codes into first-order concepts. Referring to the examples above, we coded 'inviting employees to generate ideas', and 'steering employee discussions' into the first-order concept of 'guiding and steering employees' discussion around specific strategic topics', or activities such as 'explaining issues raised by the CEO to employees', and 'intervening in discussions between the employees and the CEO' as 'acting as intermediaries between the CEO and employees'. Next, we engaged in axial coding, wherein we searched for relationships between and among these first-order concepts, which facilitated assembling them into second-order themes. During this stage we iterated with the literature, where possible using existing labels in the literature on middle managers' activities (e.g., Floyd and Wooldridge, 1992) for these themes, such as 'championing, steering, guiding'. Specifically, we assembled the first-order concepts of 'guiding and steering employees' discussion' and 'acting as intermediaries' into the second-order theme of 'influencing downward', whereas 'coordinating between working groups', 'interpreting employees' information', 'and championing new strategic alternatives' were clustered into 'influencing upward'. However, for activities we did not find in the middle manager literature, we generated new codes, such as 'clandestinely influencing the strategy', in which influencing upwards and downwards was performed through activities that hid from scrutiny middle managers' efforts to shape the strategy process. Further details of these second-order themes and the types of activities included within them are provided in Appendix A.

In the third step, we synthesized similar themes into several overarching, conceptual dimensions, in iteration with our theoretical framing. Overall, we identified three conceptual dimensions that explain middle managers' struggle over their subject position. First, we gathered themes into the conceptual dimension of 'maintaining subject position' in which middle managers engaged in their traditional well-known activities for influencing the strategy, such as 'upward influencing' or 'downward influencing' (Floyd and Wooldridge, 1992). Second, we found several activities relating to the restriction of middle managers' subject position, which includes all activities that – intentionally or unintentionally – they experienced as reducing 'their autonomy as organizational actors, or their identity as respected and important organizational members' (Laine and Vaara, 2007, p. 36). Accordingly, we clustered 'turning MM into supporters' and 'marginalizing MM' into the conceptual dimension of 'restricting subject position'. Third, with regard

to 'reclaiming subject position', we coded those activities that middle managers engaged in clandestinely or indirectly, or assuming activities of other participants in their efforts to reinstate their influence on the strategy process. The final data structure is illustrated in Figure 1, which summarizes the second-order themes and conceptual dimensions.

In a last step, we examined when the involved middle managers maintained or reclaimed their subject position across the strategy process (based on the conceptual

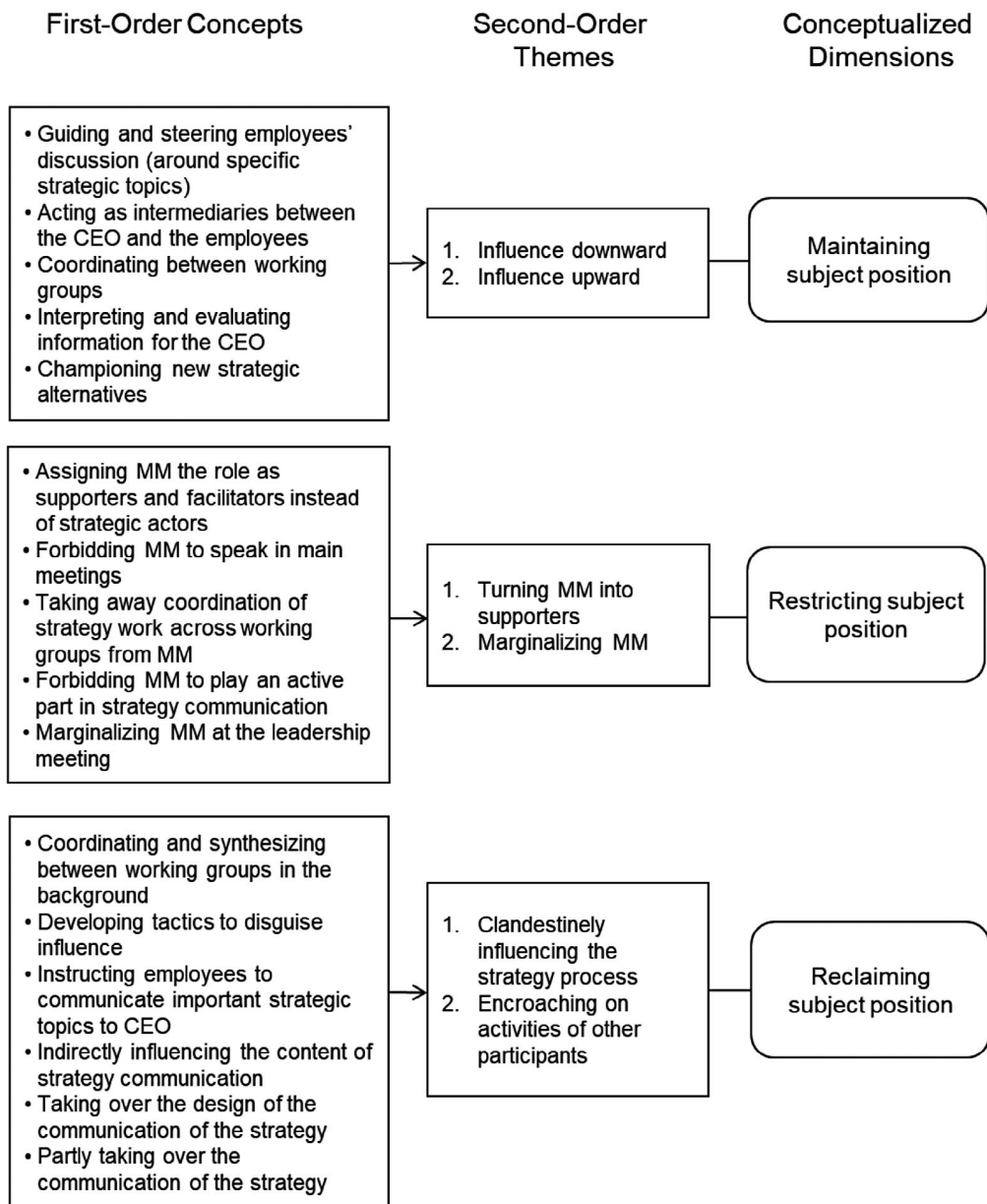


Figure 1. Data structure

dimensions identified in step three), as we realized that the middle managers' behaviour to respond to the struggles over their subject position changed. Accordingly, we distinguished between three phases of middle managers' reclamation of their subject position that demarcate shifts in the middle managers' behaviour to respond to the struggles over their subject position. From this and our conceptual dimensions we generated a process model (Langley, 1999; Langley et al., 2013) that provides the basis of our discussion and contributions.

To ensure the validity of our analysis and findings we adopted a number of measures (Lincoln and Guba, 1990). First, we maintained a rigorous audit trail of all data collected across multiple sources. We organized these data in an NVivo database that enabled us to index, search, code, and recode across all relevant data sources as our analysis progressed. Second, we maintained careful tracking of our analytic process, holding regular author team sessions to interrogate the codes we were developing, pushing ourselves to justify our ideas, then making memos about our discussions, and using these to support the emergence of themes (Gioia et al., 2013). Third, we engaged closely with our participants throughout the process and presented our general findings to them to ensure that they resonated with participants' own experiences.

## FINDINGS

We now present a processual analysis of our findings on the involved middle managers' efforts to maintain and reclaim their subject position in response to the challenges that they experienced from a more participative strategy-making process. Further representative examples of our analytic categories are presented in Appendix A.

### **Phase 1 – Middle Managers' Struggle to Maintain Their Subjective Position as Their Tasks are Reallocated to Employees**

The first phase of this process started with the newly appointed CEO's decision to include front-line employees in the corporate strategy-making process in order to get their input and novel ideas. This was meant to result in a strategy that would be 'simple, straightforward and relevant to everyone' (Intranet announcement) as the existing strategy was widely perceived to be ineffective. In a video message to the employees the CEO explained:

We are looking for 40 young colleagues from across the business who are innovative, experts in their field, fluent in English, and committed to put in an extraordinary effort over the next five months [...]. This is a unique moment for the company and a unique chance for you to share your vision for our future. (CEO video message)

Of the 2000 employees who applied to become a participant in the strategy process, 40 were eventually selected based on various measures such as an HR check, evaluations of application videos and interviews.

As these employees had no experience with strategy-making processes, the CEO and the head of strategy asked eleven middle managers (MMs) to support the employees in



their strategic activities.<sup>[1]</sup> The head of strategy called up each of the MM personally to ask them whether they would like to support the employees. In particular, he told them 'don't think that this is your platform to distinguish yourselves because you will closely work with the CEO [...]. Otherwise I'll send you home [...]; don't play games [...]. If we acquit ourselves well, we will all benefit from it' (Interview head of strategy). Additionally, the following rules-of-engagement were developed and shared with all participants. The MMs should

promote employee participation to drive the content; they should empower and coach employees [...] and ensure employees have the opportunity to present the content to the CEO (Slides, initiation document)

These rules-of-engagement seemed to define the MMs as mere supporters in the strategy process. The MMs were not expected to develop the strategy themselves but rather promote employees in driving the content and ensuring that they could engage directly with the CEO. As the MMs were not supposed to exert any direct influence on the strategy process but merely support the employees, it appeared that the activities usually performed by the MMs were reallocated to these employees. However, the MMs did not understand what these rules-of-engagement meant for the enactment of their strategic activities. They did not realise that the inclusion of employees had reallocated their tasks and, so, might have implications for their existing, known, way of constructing their subject position as strategists. Accordingly, instead of concentrating on their support role they continued with their known activities of upward (to the CEO) and downward (to the employees) influencing, continuing to maintain their subject position in their usual ways.

Concretely, the MMs continued their activities of influencing downward by coordinating the strategy work across the working groups, acting as intermediaries between the CEO and the employees, and by guiding and steering employees in their discussions around specific strategic topics. For example, with regard to guiding and steering the employees, the MMs leading the customer group steered the employees in rethinking and further developing some initial questions that these MMs had developed for their group; illustrated by the following vignette from a working group meeting during the second week.

After guiding the employee meeting participants in rethinking the questions they had developed, one of the MM suggested to the employees, 'Why don't we go around the table and each of you explains what you would add or specify on the questions?'. He steered them on how to do this by providing an example: 'So you take 'How do we define our customers?' and you specify it to 'Is the customer a [legal] person who pays the premium?'.

As no employees replied immediately, MM Peter further clarified his steer: '[If you explain how you would define the customer] you also have the opportunity to learn about each other's work'. One of the employees started to respond to the MM Peter's guidance, suggesting tentatively that the company could respond to opportunities in the market by expanding their definition of customers: 'So maybe we can increase the



portfolio that we have, because, right now, it's really difficult that we provide just risk engineering services for a customer. But maybe in 10 years we can explore that, because, as we know, there are excessive capabilities in the market'. The employees were thus responding to the MM's guiding and steering influences over their contributions to the strategy. (Customer working group meeting, 2nd week)

In addition to guiding and steering employees, the MMs also exerted downward influence by acting as intermediaries, facilitating employees' understanding of the CEO's strategic intentions. As one of the employees described it

There is [the CEO] who is the sponsor and the big, big boss, right? There are the [MMs], who are in between [the CEO] and us [the employees]. So, it's good because they are protecting us. [...] And maybe that's why sometimes they are taking their own decisions without talking to us because they are exposed to [the CEO's] opinion. And so, I don't know if maybe there is another better way to do it but the thing is, they are using us to talk to our heads at the business units so to come up with some different ideas. (Employee Interview)

This quote illustrating the employee's experience, shows that the MMs exerted influence on the strategy process by performing their traditional activities of influencing downward. The MMs, thus, interfered in the activities that widening participation intended to assign to the employees by shaping how the employees would perform them. In this sense, the MMs implicitly constrained the employees' enactment of the strategic activities assigned to them.

As part of enacting their traditional strategic activities, the MMs also exerted upward influence by interpreting and evaluating employees' information for the CEO, as well as by championing new strategic alternatives that they had developed with the employees. For example, in one of the first meetings with the CEO, one of the employees described the strengths and weaknesses of the corporate business of the company but the CEO interrupted this description harshly. MM Nathan, took this as an opportunity to champion the idea of talking about the strengths and weaknesses that he had advised the employee to describe

Responding to one of the employees, the CEO queried why the company should remain in the corporate business at all, stating, 'So over the last six years on corporate, we made an average of 7 per cent return on equity. Seven. Only one year we exceeded 10 per cent. [...] So I think we should ask a very basic question, why should we play in corporate?'. MM, Nathan, who had steered the employee to talk about the strengths of the corporate business, interrupts the CEO in order to champion his idea. 'I fully understand your point – but then we need to change the structure of how we evaluate the business because at the end of the day, [...] we are the top player in certain markets. That's the reality. [...] So let's say what it takes to win in Germany, in Latin America. [...] At the end of the day, what we're trying to do is look in parallel into different aspects of the value chain of the business'. (2<sup>nd</sup> CEO meeting, week 4)

This vignette illustrates how the MM intervened to champion an idea raised by one of the employees to the CEO, upward influencing by intermediating between the CEO and the employees. By continuing to championing ideas, the MM can maintain his subject position as strategist, while the employees who had raised the idea initially and who was criticized by the CEO was constrained in his assigned role from championing this idea himself.

These dynamics, within which MMs continue to perform their known strategic activities of upward and downward influencing and thereby constraining the employees from performing strategic activities themselves, occurred on multiple incidents throughout this first phase of the strategy-making process (see Appendix A for further representative evidence). Overall, these dynamics shows that, even though employees were formally invited to participate in the strategy process and were allocated strategic activities that were traditionally carried out by the MMs, the MMs did not restrict themselves to the assigned task of supporting the employees. Instead, they continued their known strategic activities of influencing the strategy process, which allowed them to maintain their subject position as strategists. However, by continuing with their traditional activities of influencing upwards and downwards, the MMs undermined the employees in their ability to participate in the strategy process themselves. In particular, the MMs intervened in employees' attempts to directly engage with the CEO, championed their own ideas, and intermediated between the employees and the CEO, thus constraining the extent to which employees could perform these strategic activities themselves. The MMs performed their traditional activities not necessarily because they did not want the employees to participate, as such, but because their existing sense of meaning and identity – their subject position as strategists – was constructed through performing these known strategic activities.

## **Phase 2 – Middle Managers' Struggle to Reclaim their Subject Position as Their Activities are Restricted**

The MMs felt that they were making good progress with developing the strategy and thus expressed some shock when they heard that the CEO was unhappy with their behaviour and wanted to restrict their influence on the strategy process. Specifically, he had decided that they would no longer be allowed to speak in the CEO meetings. This decision was communicated to the MMs in a meeting with the head of strategy as the following vignette describes.

The head of strategy introduced the bad news carefully to the MMs at their meeting. '[An additional] thing is that we need to change a bit of the choreography because the feedback that we got is that there is a perception – for us, is it just a perception – there are not enough task force members [i.e., employees] presenting [in the meetings with the CEO]'.

Immediately MM Nathan interrupted, asking: 'What does it mean? Was this [coming] from the task force members?'. The head of strategy tried to explain: 'No, no. It was just that usually there are three or four [MMs] talking, when there are a lot of task force members who do not say something in the room. [...] And now we are thinking,

if it makes sense for each of the topics, that [those MMs] who are not connected to this topic [...] leave the room at that point or at least do not talk during the meeting’.

The MMs looked at each other speechlessly, then burst out laughing ‘Honestly?’, ‘I don’t get it!’. The head of strategy tried again to explain: ‘Basically, there was a message that we don’t have a lot of juniors that share [their ideas] in all the discussions, or that can contribute to discussions’. The head of strategy’s assistant added: ‘Actually, that was [the CEO’s] point. He said, ‘Too much influencing from the senior guys’. The MMs could not believe what they were hearing, especially because they had been trying ‘to be very thoughtful about us not interfering at all, actually’, as MM Barbara remarked at the end of the meeting. (Middle manager meeting, week 8)

As this extract shows, the MMs became aware that they were no longer allowed to talk directly to the CEO, thus restricting their possibilities of influencing the strategy process. They realized that the CEO wanted the employees to champion their ideas themselves, while the MMs should stay in the background. The MMs experienced the CEO’s intervention as a threat to their subject position because it restricted their known strategic activities of upward influencing. By restricting the input from the MMs, the CEO wanted to ensure that he would get access to the employees’ ideas rather than those of the MMs. He felt the MMs were preventing him from hearing the employees’ views.

I want a flow of ideas to get out freely and not to be filtered and not to be constrained. And what we’re getting instead is [MMs] defending what they have today, which is not the right approach. It’s not about defending or not. It’s about thinking what is right for [the company]. But there are too many people who have skin in the game [...] And my partial dissatisfaction with this is that I don’t believe that I heard the truth there. I heard the filtered truth, and this wasn’t meant to be the nature of the process. The process should not be filtered. [So the] problem is that we have too many [MMs], and they influence too much. And so they constrain too much. (Interview CEO)

The CEO’s view was echoed by one of the employees who highlighted that the CEO ‘would appreciate more hearing from the task force [the employee] rather than from the [MMs]. That’s why he voiced it’ (Interview employee). The CEO’s decision to allow the employees to directly engage with him and to champion ideas themselves was also announced to the employees by the head of strategy.

‘So what we’ll do tomorrow, we will run it [the meeting with the CEO] slightly differently. Just trying out now, what works best. So we will be in the room, as usual, but, we will have more of you [the employees] around the table. And it will be only you around the table. And all the [working group] leads [i.e., the MMs] will sit down somewhere in the background so that you have as much face time with [the CEO] as you wanted’. (Plenary session, week 8)

While the CEO tried to restrict the MMs to perform their known strategic activities of upward influencing, the MMs tried to reclaim their subject position as strategists. Since

they could not continue acting as usual, the MM adapted their activities and began to perform their strategic activities clandestinely.

Specifically, the MMs started to perform the strategic activities of coordinating and synthesizing the strategy work across the various working groups in the background. To coordinate the strategy work, the MMs met once a day to discuss which issues the groups should work on and how the issues of one group might be relevant for another group. By performing the activity of coordinating strategy work in the background, the MMs were able to exert influence on the strategy process because they could define which issues were discussed in the working groups and thus, which issues would be prioritized.

Aware that they needed to remain in the background, they also developed tactics to disguise their influence. For example, as described in the following vignette, MM Marvin explained to the other MMs in one of their meetings how to push a particular idea with the CEO without him noticing that the idea came from the MMs rather than the employees.

The MMs were aware that they were not allowed to talk in the CEO meetings anymore. However, MM Marvin raises an issue that has been discussed at the previous meeting with the CEO. 'So, last time [in the CEO meeting], we talked about the customer management framework and remember, [the CEO] said we don't do anything in terms of customer engagement yet. And that's not true. It's just not true. [But] we [the MMs] will not tell him, '[CEO], you are wrong'. While accepting that they cannot speak directly to the CEO anymore, nonetheless he continued with new tactics for exerting disguised influence via the employees. 'But what we'll do, we'll just say, 'Okay. We launched the customer commandments into the customer management framework, and one big piece is the customer insights [...]. And that's what I saw as the thing [...] So I instructed them [my team] to talk a bit more about the customer engagement'. (Middle manager meeting, week 10)

This extract shows that the MMs disguised their influence on the strategy process by instructing the employees to champion ideas that the MMs found important. That is, the MMs influenced what points the employees would communicate to the CEO, emphasizing those points that the MMs perceived as particularly important. In this way the MMs continued strategic activities of influencing upward, albeit clandestinely, through instructing and steering the employees. By continuing to perform their strategic activities clandestinely, the MMs were able to reclaim their subject position as strategists. However, by instructing the employees on which ideas and how they should be presented, the MMs shaped how the employees would perform championing activities, thereby constraining the employees' own championing activities.

Further representative examples of the clandestine activities through which MMs retained their ability to influence the strategy during this phase and, so, to construct their subject position as strategists, are included in Appendix A. Overall, during this phase, the MMs struggled to construct themselves as strategists because they were no longer allowed to perform their traditional strategic activities of influencing the strategy process. However, MMs reacted to this by adapting their activities in order to retain their upward influence indirectly, by using their downward influence on the employees to have their own ideas championed. This enabled them to continue, clandestinely, to exert influence

on the strategy process and reclaim their position as strategic actors. However, in doing so, the MMs constrained employee participation by shaping and interfering in the strategy activities that were assigned to these employees.

### **Phase 3 – Middle Managers’ Struggle to Reclaim Their Subject Position as Their Activities are Further Restricted**

The MMs were soon faced with another challenge to their attempts at retaining their subject position as strategists. Coordinating strategy work across the working groups in the background had been one of the main strategic activities through which they had continued to influence the strategy-making process clandestinely. Yet this was now taken away from them and handed to the internal consultants – thus further restricting the MM activities. In one of the interviews with the head of strategy, he explains this decision.

The [internal consultants] are now writing the overall story without the [MMs] because they often bring in ideas based on their personal interest that do not fit with the overall story (Reflection interview head of strategy)

The ‘story’ in this quote by the head of strategy, refers to the way the material from the different working groups was being coordinated and brought together in informing the final strategy document. In giving this work to the internal consultants, he shows awareness that the MMs are indirectly and clandestinely coordinating amongst their working groups to influence the strategy process. More specifically, it had become apparent that in coordinating the strategy work across the working groups, the MMs were not necessarily privileging the ideas arising from employee participation, but rather, clandestinely, feeding their own ideas, or those they had influenced the employees to promote, into the strategy-making process. By taking away the coordination task from the MMs and assigning it to the consultants instead, the head of strategy tried to restrict the MMs ability to enact their strategic activities of influencing which ideas would be championed in the strategy-making process.

The MMs appeared angry and shocked that the overall coordination of the strategy work would be taken over by the internal consultants, as the following quote by MM Robin illustrates.

There is a lot of frustration around [among the MMs]. [So] the atmosphere among the [MMs] is increasingly bad [because] we were kicked. [...] Now I’m sitting here asking myself ‘are you mad? Why are you doing this here?’ (Interview MM Robin, week 14)

The MMs appeared frustrated that they had been yet again restricted in enacting one of their core activities of influencing the strategy-making process that had allowed them to maintain their subject position as strategists. However, the MMs once again found new ways of reclaiming their subject position. Rather than trying to enact their existing set of strategic activities clandestinely, they discovered a new set of strategic activities that would allow them to exert influence, which was taking control of the strategy communication.

The newly developed strategy was going to be internally communicated at a 'leadership team meeting' to which the 140 top executives of the company were invited. Given the importance of this event, the MMs were convinced that by taking charge of the strategy communication they could reassert their position as strategists. MM Peter explained.

I think [the strategy process is finished] to some extent, but after you spend so much time in delivering [the strategy], in creating the story, I think how you then position [it in terms of communication] is very important, no? [The strategy] still needs to be able to pass through us [i.e., the MMs] in order to be communicated as concretely as possible. (Interview middle manager Peter)

By shaping how the strategy would be communicated, the MMs saw a way of reclaiming their subject position; it offered them a new way to influence the strategy process despite the restriction of their previous activities.

However, by taking charge of shaping the communication of the strategy, the MMs encroached on the domain of the head of communication. Thus, in one of the MM meetings in which the head of communication participated, the MMs intervened in the design of the strategy communication that the head of strategy had set out, as the following vignette describes.

The head of communication starts explaining, vividly, her idea. 'I do have a plan for how the leadership meeting will go. [...] there will be four breakout sessions during the leadership meeting that are led by the task force [i.e., the employees]. And then [the participating executives] have a sort of a hopefully fairly creative and interesting presentation of each piece of content whether it's commercial or retail or whatever. And then they're [the executives] trying to answer questions of what does the strategy mean to them? What will they be prioritizing, in reaction to it? [...] The idea being that you've got the basis of an elevator speech or sort of communications kind of message down ready to take back to the countries or their teams'.

MM Francis interrupts the explanations of the head of communication and puts forward the communication plan that the MMs had developed and which sets out different priorities and means of achieving them. He explains: 'The two main objectives we have with leadership team members [are], that they understand the strategy, and that they have the right motivation to go back and share it with their teams and take the necessary actions to bring it to life [...]. So really, two basic things. First of all, understand, second of all, motivate. If those were the two most important things, then how do we give people the time to make sure that they do understand? And maybe it is some presentation and some opportunity at tables to have a discussion with their fellow leadership team members [...]. Which is different from answering [which] feels a little too [complicated].

Building on MM Francis's outline of the communication plan, MM Maria takes the ideas a step further 'Agreed. Can I make a suggestion then? Maybe we can almost do a roleplay, right? Where the leadership team pretends to be their [own] team and asks us questions. Because effectively then we're the ones answering as if we're the leadership



team, [so] we give them an opportunity to [ask] us anything, but not as themselves, but as their team'. All MMs nodded, supporting their colleagues' attempts of taking control over the design of the communication. Overruled by the MMs, the head of communication gives her consent as well but also raises another concern: 'That'll make sense, but would you see the task force [i.e., the employees] being able to answer those questions? MM Marvin overcomes this concern by emphasizing that they will be present in the presentations to the leadership team to support the employees in communicating the strategy and answering questions: 'I think with us [the MMs] there, they would be able to. [...] I think this way we can have some influence over what is said'. (Middle manager meeting, week 16)

The extract from this meeting shows that the MMs positioned themselves as experts about the strategy, who have insights on the most effective way of communicating the strategy, which enabled them to decide that the communication should be designed differently than the head of communication had initially suggested. By encroaching on the domain of the communication head in this way, the MMs were able to shape the strategy communication according to their plans and in this way enact some influence on the strategy process.

Apart from designing the communication process, the MMs also played an active part in the actual communication of the strategy. In the extract of the meeting shown above, the MMs made sure that their presence in the presentations of the strategy to the leadership team was perceived as important to support the employees in answering the executives' questions. Thereby, the MMs would be able to actively communicate their view of the strategy and so 'have some influence on what is said' (as MM Marvin expresses in the meeting extract). However, by playing an active role in communicating the strategy, the MMs would, yet again, also be restricting the employees' own communications – after all, the employees were supposed to present the strategic outcome of their respective working groups themselves.

Other representative examples of these continued activities of clandestine influence, such as intervening in or taking over others' allocated tasks are included in Appendix A. In summary, during this third phase, the MMs struggled to construct themselves as strategists because their clandestine strategic activities of influencing the strategy process were restricted through the reallocation of the important task of coordinating strategy work to others. However, by taking charge of the strategy communication the MMs were able to reclaim their subject position as strategists. In doing so, they both encroached on the activities of the head of communication and also interfered in the employees' own activities to communicate the strategy. As a consequence, the MMs indirectly restricted not only the extent to which the employees could communicate the strategy but also the head of communication's activities of designing the strategy communication.

#### **Phase 4 – Middle Managers Make Another Attempt to Reclaim Their Subject Position, as Their Activities are Again Restricted**

Having shifted the focus of their activities to the management of the communication process, the MMs were faced with yet another challenge when they found out that they



would be banned from engaging in the strategy communications at the important leadership meeting. The head of communication in one of their joint meetings told the MMs that they should stay on the side-line at the leadership meeting, preventing them from playing an active part in communicating the strategy.

The head of strategy explains his idea of the role of the employees at the leadership meeting: 'I think the idea is that the task force [i.e., the employees], they add value by giving, first of all, our perspectives on how the strategy was developed. So why they think it will work, why it is the way it is'. But MM Francis asks quite perplexedly: 'And when you say the task force at the leadership meeting, it's only the 40?'. Then the head of communication jumps in: 'That's the message I'm getting at the moment from [the CEO]. I mean, the role of you guys at the leadership team meeting is really just to jump in if the task force members need protecting or need a bit of help'. The MMs started laughing sarcastically. Then MM Barbara replies, with an angry tone 'I think the question is not "being there" or "not being there" but whether we have an active part or not and I think this is the question that everyone is asking themselves'. While Barbara raised this rhetorical question, it was clear that the MMs would not play an active part in communicating the strategy. (Debrief 6th STC meeting, week 18)

Telling the MM that they would not play 'an active part in the leadership meeting' visibly shocked them as evidenced by their sarcastic responses and their raised angry voices. This move implied that, yet again, their subject position as strategist was threatened. They were cast as spectators at the leadership meeting, thereby restricting their activities of influencing the strategy process through direct engagement with the participating executives. In response, again, the MMs tried to reclaim their subject position as strategic actors by influencing the content of the strategy communication clandestinely. Similarly, to the second phase, they instructed the employees what to say at the leadership meeting; in this way they managed to shape, indirectly and clandestinely, what would be communicated. Specifically, they instructed the employees about the presentation of the content as well as about the answers to potential questions that the executives were expected to raise. In one of the mock presentation sessions, in which the employees rehearsed their presentations for the leadership team meeting in front of the other MM, and where they were also supposed to show a video, the MMs acted in the role of the executives to prepare the employees for their questions, instructing the employees what to respond and thereby indirectly influencing the communicated content.

After showing a video of a cycling team, one of the employees explains the analogies of this video by referring to the main strategic issues for the commercial business. Having explained why the commercial business needs to return to technical excellence, MM Peter impersonating a top executive in the leadership meeting raises his hand to ask a challenging question. 'So the big question that would come from me is; So you're talking about investment in technical excellence. You talked about things in your video, analogy around "We need to have the right tools, the right equipment", that with sales probably need to spend money. Where's the money going to come from?'

One of the employees gives the answer he has prepared for such a question. ‘Yes, that was the challenge we raised in the team and I said, “Do I need a new bike? Do I need the best one? Or can I use the one that we have?” [...] So it’s something that we’ve tried to reconcile here, but it’s a fair point’. MM Peter is pleased with how the employee had answered this question. However, he instructs the employee to refer also to the operations & IT group in order to explain that, unlike the strategy for operation and IT, the commercial business should not aim at cost cutting, which is an important distinction he would like to have included in the ‘script’ for the strategy of the commercial business. ‘But it’s not about retooling [in the commercial business, the operation and IT group is] going to talk about cutting that cost base. We should definitely add this to our presentation – that commercial is distinct from operation and IT. So you have to emphasize that it’s really some of the things that we already have in the infrastructure that we can change’. The script for the presentation of the commercial strategy was subsequently changed accordingly. (Plenary session, week 18)

This extract shows how the MMs tried to indirectly influence the communication of the strategy at the leadership meeting even though they were banned from engaging with the executives themselves. We interpret this as clandestine activities of influencing because the MM indirectly shaped the content of the strategy communication by coaching the employees in what to say. Through enacting these clandestine strategic activities of indirectly influencing the strategy communication, they managed once more to find a way to reclaim their subject position as strategic actors in the strategy process. However, by exerting their influence in this way, the MMs yet again restricted the activities of the employees, interfering in them defining the content of the strategy communication themselves.

In summary, throughout the strategy-making process, we see that despite being restricted in their ability to enact strategic activities time-and-time again, the MMs continuously struggled to reclaim their subject position as strategists. That is, they did not simply accept the reallocation of their activities to others, which they experienced as undermining their own subject position, but rather they extended the repertoire of their strategic activities, either by performing their activities clandestinely or by encroaching on the activities of other strategic actors. These dynamics through which they managed to continue to construct themselves as strategists occurred on multiple occasions throughout the strategy-making process whenever they experienced changes to that process as a threat to their subject position.

## **TOWARD A PROCESS MODEL OF MIDDLE MANAGERS’ STRUGGLE OVER THEIR SUBJECT POSITION**

We now draw together our findings into a conceptual process model that highlights the dynamics of how MMs construct and re-construct their subject position in the face of challenges associated with efforts at widening participation in strategy making. As depicted in Figure 2, the process model consists of three conceptual phases: 1) ‘continuation phase’, 2) ‘clandestine phase’, 3) ‘encroachment phase’. Empirically, these phases

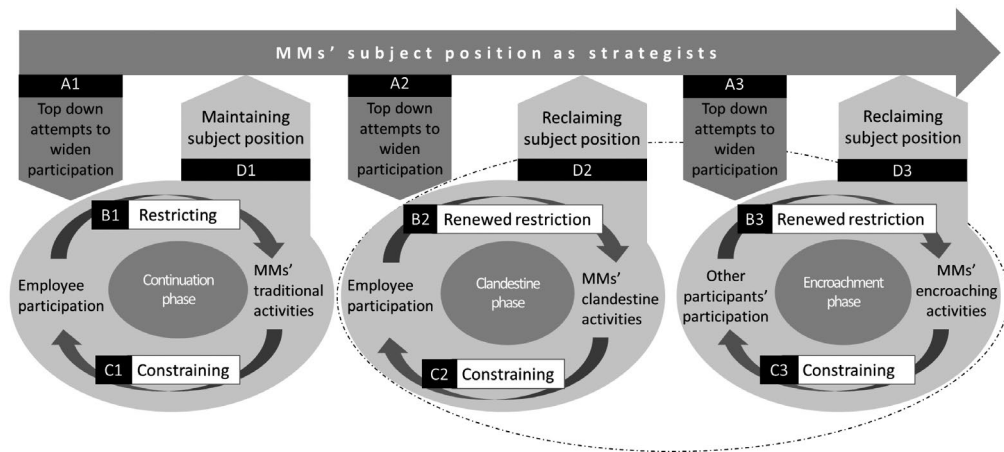


Figure 2. Process model of middle managers' struggle over their subject position in Open Strategy processes

can vary in terms of combinations or repetitions (as our empirical findings show). These three phases capture the dynamics through which MMs maintain and reclaim their subject position as strategists in response to the challenges they experience when widened employee participation in the strategy-making process threatens that subject position.

The first phase in our model shows how, at the outset of a top-manager initiative to widen participation in a strategy-making process, MMs maintain their subject position as strategists by performing their traditional, known ways of influencing the strategy process. As depicted in arrow A1 of our model, attempts at widening participation by top management are meant to enable employees to perform strategic activities. However, these attempts, possibly unintentionally, restrict MMs activities of influencing the strategy process (arrow B1) because enabling employees to perform strategic tasks implies that the MMs will no longer perform these tasks themselves. Yet, possibly because they are unaware of the implications of employee participation for their own activities, or because they have not been given alternative activities to perform, MMs will continue to perform their traditional strategic activities and thereby maintain their subject position as strategists. In our case, the MMs continue to perform their known strategic activities of influencing upwards and downwards (see Floyd and Wooldridge, 1992; Wooldridge et al., 2008) as these are the strategic activities with which they are familiar. Importantly, however, by continuing to perform their known strategic activities, the MMs implicitly constrain the intended employee participation, as depicted in arrow C1. This establishes the continuation dynamic in our process model, in which MMs' continued performance of their activities constrains employee participation by interfering in the ability of employees to perform these activities themselves. In our case, the MMs intervened in the employees' attempts to directly engage with the CEO, championed their own ideas, and intermediated between the employees and the CEO. Our continuation cycle depicts this ongoing dynamic of restricting MMs activities and constraining employee participation (see the recursive arrows B1 and C1): every attempt of employees to participate in strategy making by championing ideas implicitly undermines the enactment of the MMs own

championing activities, while every attempt of the MMs to retain control of the championing activities in their traditional way restricts employees' possibilities for participating in the strategy process. This continuation dynamic is important for MMs, as continuing to enact their traditional strategic activities of influencing the strategy process enables them to maintain their subject position (arrow D1).

If further efforts are then made by top managers to widen participation (arrow A2), by banning MMs from enacting their traditional activities of influencing the strategy-making process, the continuation phase will be disrupted, marking a transition to the second, clandestine phase. This renewed attempt at ensuring employee participation in the strategy process by restricting the MMs from enacting their traditional activities, generates a new set of dynamics in which the MMs perform their influencing activities clandestinely (arrow B2). While the top managers' intervention may restrict some activities for influencing strategy, in order to foster employee participation, such as direct upward influence in our case, it generates grounds for new dynamics. Specifically, MMs manage to reclaim their subject position (arrow D1) by finding clandestine ways to perform activities of influencing the strategy process. In our case, the MMs persisted with activities of influencing downward, and also used those activities to clandestinely influence upwards, for example by steering employees on what points to champion in their employee engagement with top managers, and by coordinating the strategy work in the background. This adaptation of their traditional activities thus implies a subtler influence of MMs on the strategy process. Yet again, and as shown in arrow C2, by clandestinely continuing to perform activities of influencing the strategy-making process the MMs constrain employees' possibilities for participation. Hence, despite the renewed attempts by top management to widen participation, employees are still constrained in their participation. Consequently, there is a recursive relationship between employee participation and the MMs clandestine activities of influencing the strategy process (arrow B2 and C2). This dynamic differs from the continuation cycle because MMs' activities ostensibly allow for employee participation in the strategy process but, because of their clandestine activities, these employee activities are actually constrained.

The second phase continues until interrupted by further top manager interventions to widen participation (arrow A3), which marks the transition to the third, encroachment phase. This transition happens when the top management becomes aware that MMs clandestine activities are inhibiting the intended participation. When MMs are no longer able to continue with either their traditional or their clandestine activities, they look for new activities (arrow B3) that allow them to reclaim their subject position as strategists (arrow D3). However, by enacting new strategic activities, the MM are encroaching on the domain of other actors, thereby restricting the possibilities for those actors to enact those strategic activities themselves (arrow C3). In our case, when top management constrained the MMs activities by taking away the previous possibilities to influence the strategy-making process, such as coordinating the strategy work across working groups, the MMs encroached on the activities of the communication officer, in order to reclaim their influence on the strategy process. In contrast to the first two recursive cycles, this way of reclaiming their subject position does not constrain employee participation but, rather, by encroaching on her activities, those of the head of communication. We therefore term these recursive dynamics (arrows B3 and C3) the encroachment phase, because

when MMs activities of influencing the strategy-making process are further restricted, they encroach on other actors' activities to reclaim their subject position, albeit that this occurs at the expense of these other participants' participation.

Finally, these three recursive cycles of continuation, clandestine, and encroachment, are processes within an overarching process of MMs' struggle for their subject position as strategists (Langley et al., 2013). While the continuation cycle is most likely to occur at the outset of an initiative for widening participation, because MMs are not yet aware that participation impinges upon their subject position, the clandestine and encroachment cycles may occur in parallel or MMs may switch between the two, depending upon how their particular influencing activities are restricted and by which other participants in the process. For example, in our case MMs switched from clandestine activities (phase two in our findings) to encroaching activities (phase three in our findings), and then back to clandestine activities (phase four in our findings). We depict this potentially parallel or reversible nature of these two cycles within the overarching process through the dotted line encompassing them.

## CONTRIBUTIONS

Our conceptual process model of middle managers' struggle over their subject position in the face of widened participation in strategy making makes contributions to both the literature on middle managers and Open Strategy. In terms of the former, our study advances understanding in two important ways. First, our findings elaborate on existing accounts of middle managers' struggle over their subject position by revealing how and why widened participation intensifies this struggle. Previous studies have shown that middle managers' struggle to construct their subject position because they lack formal authority (Burgelman, 1994; Jarzabkowski and Balogun, 2009; Laine and Vaara, 2007; Westley, 1990), face emotional disaffection (Huy, 2011), or have to deal with inconsistent expectations (Currie and Procter, 2005; Floyd and Lane, 2000; Thomas et al., 2011). While all of these struggles are related to changes in strategy *content*, such as when a strategic change undermines the middle managers' subject position, we show how changes in strategy *process*, such as the widening of participation in strategy making, intensifies existing struggles over their subject position. While it is generally known that assigning new roles might trigger some form of resistance (e.g., Barley, 1986; Jarzabkowski and Balogun, 2009; Lê and Jarzabkowski, 2015), it is not just that the middle managers in our study are resisting the assignment of a new role. In our study, their roles were never so clearly defined. Hence, rather than resistance to a specified role, middle managers instead extended their repertoire of strategic activities, thereby overcoming the restriction of their known strategic activities when participation is widened. Thus, the move to widened participation does not imply that middle managers simply resist a new role but that they find new ways of maintaining their subject position as strategist. In this sense, widened participation confronts middle managers with the precariousness of their subject position as strategists, again, not by assigning them a new strategic role but by impinging on those strategic activities through which they influence the strategy process, so making them struggle even harder to find ways to reclaim their subject position. While

our study has focussed particularly on the inclusion of employees in the strategy process, similar effects could be expected to result from related trends, such as flattening hierarchies (Parker, 2012), the introduction of holocratic structures (Robertson, 2015) or agility management (Doz et al., 2008), as such trends involve some form of redistribution of strategic activities from the middle managers to other actors.

Second, our study extends understanding of the activities by which middle managers construct their subject position, elaborating on an alternative repertoire of activities through which they influence the strategy-making process when their traditional activities are restricted. Previous studies found that, in traditional strategy processes, middle managers use strategic activities of upwards and downwards influencing, such as championing strategic ideas (Floyd and Wooldridge, 1992), issue selling (Dutton et al., 2001) and sensemaking (Balogun and Rouleau, 2017; Huy, 2002; Rouleau and Balogun, 2011). Our study extends these findings by showing that in the context of widened participation, these traditional ways of influencing the strategy process are constrained, prompting middle managers to expand their repertoire of influencing activities. In particular, we found that while middle managers initially defend their traditional activities, they first adapt their traditional activities to clandestine forms of exerting upward and downward influence and then, if this is no longer possible, take over strategic activities from other actors, encroaching on their domains. Thus, our study shows that even when middle managers' traditional activities of constructing their position as strategists are constrained, widened participation can open up new repertoires for middle managers to enact influencing activities.

Our study also contributes to the emerging stream of literature on Open Strategy. First, our findings advance existing understanding of the implications of inclusive strategizing for traditional strategy actors, as per recent calls for research (e.g., Seidl et al., 2019). In particular, we show how widened participation can undermine the subject position of middle managers. Existing studies have already shown that opening the strategy process can empower actors by enabling them to raise minority issues and thereby influence the strategy process (Hautz et al., 2017; Malhotra et al., 2017), while also undermining opportunities for, and commitment to, engaging in the strategy process. This could be a result of top managements' attempts to maintain control over the process (Hautz et al., 2017; Luedicke et al., 2017) or a lack of clear rules and procedures for participation resulting in the exclusion of certain groups of actors (Dobusch et al., 2019). Our study extends these findings by showing that the extent to which all participating actors can perform the same strategic activities at the same time are restricted, leading to recursive dynamics through which actors undermine each other's opportunities for participation. More specifically, our study shows that by widening participation to new actor groups, top managers might inadvertently restrict the activities of middle managers, which in turn sets off recursive dynamics of different actor groups encroaching on and constraining each other's participation in the strategy process. In other words, the more top management involves additional actors in the strategy process, such as employees in our case, the more other participants, such as middle managers in our case, might struggle to participate in the process.

This trade-off in the participation of different groups of actors can also affect the participants' expectations that are fuelled by widened participation. Various studies have



shown that widened participation raises expectations by the top management (e.g., to make more informed decisions) as well as by the participating actors (e.g., to get heard in the strategy process), which causes frustration and anger and can ultimately lead to reduced commitment and motivation if these expectations are unmet (Hautz et al., 2017; Mack and Szulanski, 2017; Seidl et al., 2019; Westley, 1990). Our study contributes to a better understanding of the reasons for these unmet expectations. As our study shows, top management's expectations might not be met because some actors, such as middle managers in our case, can undermine and restrict the participation of other groups, in our case the employees. In addition, while the middle managers' expectations were met initially (they continued to perform their known activities), they became increasingly disappointed by top management's continuous restriction of their participation. This implies that actors who are more experienced in influencing the strategy process, such as middle managers (Floyd and Lane, 2000; Wooldridge et al., 2008), might have an advantage over other actors, such as employees, in claiming a subject position as strategy actor while pushing others to the margins. In doing so they might also, intentionally or unintentionally, reduce the chances that employees' expectations of participation will be met.

By elaborating how participants undermine each other's participation, our study also elaborates upon earlier studies that have highlighted the importance of clear structures, in terms of procedures of participation (Dobusch et al., 2019) with which the goals and intentions of openness need to be aligned (Gegenhuber and Dobusch, 2017; Heracleous, 2019). We extend these findings by showing that setting up clear structures for participation needs to include consideration of the existing organizational structures, and in particular the traditional strategic activities of organizational members. As we showed, if additional actors are included in the strategy process, such as employees in our case, the set of activities with which actors can participate needs to be extended in order to prevent traditional strategy actors, who might be used to performing particular strategic activities, from undermining the participation of new strategy actors.

Second, our findings on the recursive dynamics of undermining participation contribute to a better understanding of the effects of widened participation at multiple organizational levels. Previous studies mostly focus on the effects of participation on external actors, such as crowds (Malhotra et al., 2017; Matzler et al., 2016; Stieger et al., 2012), communities (Gegenhuber and Dobusch, 2017; Hutter et al., 2017), or the organizational workforce as a whole (Denyer et al., 2011; Luedicke et al., 2017; Morton et al., 2015). Despite these insights, there have been various calls to further examine the implications of widened participation, particularly for traditional strategy actors, such as middle managers (Hautz et al., 2019; Splitter et al., 2019). Our study responds to these calls by examining the mutual effects of participation upon actors from multiple organizational levels, namely by middle managers and employees. In particular, we show that participation of middle managers and employees entails an ongoing struggle between those who try to maintain their subject position as strategists, and those who are invited to participate but struggle to have an influence on the strategy process. In addition, we show that this struggle also concerns participating actors from lateral structures of the hierarchy such as when the middle managers encroached on the activities of the head of communication. Thus, our study extends existing knowledge on the effects of participation by showing a recursive struggle between participating actors from various levels of



the hierarchy. Even when the intention is to increase participation in strategy making, we show that it remains challenging to enable participation at the same or multiple organizational levels simultaneously.

Third, our paper contributes to a better understanding of the dynamics of widened participation over time. Previous studies revealed that the scope of participation tends to change over the course of the strategy process or across the companies' life cycle (Dobusch et al., 2019; Gegenhuber and Dobusch; 2017; Mack and Szulanski, 2017). Our study extends these findings by taking a dynamic process view on participation to show that who participates, when, and how is an unfolding process over time that may involve shifting patterns of influencing the strategy process. More specifically, we show that initially middle managers' strategic activities of influencing the strategy process were restricted in order to enable the employees to participate. This restriction of middle managers' strategic activities triggered a search for alternative types of strategic activities for influencing strategy, so constraining the intended employee participation. Thus, our study confirms that participation changes throughout the strategy process but, importantly, this change in participation is constructed within shifting patterns of activities to influence the strategy process. A dynamic process view on widened participation thus allows us to explain how inclusion and exclusion develops over the course of the strategy process.

## **BOUNDARY CONDITIONS AND FUTURE DIRECTIONS**

Concluding, we highlight some boundary conditions of our study, which also open up opportunities for future research. The first boundary condition concerns our particular case of Open Strategy. The strategy-making process we studied included only organizational members and was restricted to a small number of the overall workforce. While our basic dynamics of middle managers' struggle are likely to apply to other contexts of Open Strategy, it is possible that the specifics will play out somewhat differently if external actors are included in the strategy process. For example, external participants, such as crowds or communities that are less bounded by organizational control and the respective organization hierarchy (Perry-Smith, 2006), might be less susceptible to undermining by existing strategy actors than participants from the bottom of the hierarchy. Such external actors might resist middle managers' attempts to constrain their participation, so that further or different struggles over their subject position might emerge. In turn, where their interests are aligned, participation by external actors might support middle managers' strategic activities of influencing the strategy process. However, given that externals typically lack experience in influencing the strategy process (Hautz et al., 2019) they might also be less able to counteract the middle managers' activities. Thus, future research could examine the various social dynamics and effects on middle managers' struggle over their subject position in the case of other forms of Open Strategy, particularly those involving external actors.

The second boundary condition concerns the particular analogue form of our Open Strategy case. Our study examined the middle managers' struggle over their subject position in the context of employee participation in analogue, face-to-face strategy meetings.

The dynamics of middle managers' reclamation of their subject position might change if Open Strategy is based on digital technologies. While digital technologies, such as wikis, blogs, or web-based crowdsourcing, might be employed to include internal or external actors, they are typically directed at large groups of actors who self-select into the strategy process (Haefliger et al., 2011; Hautz et al., 2019; Stieger et al., 2012). As middle managers might not be able to engage with a larger group of actors directly to steer and guide them, they may not be able to undermine their participation in the same way as with unexperienced employees. Moreover, research has shown that digital technologies are particularly suitable for the inclusion of minority views because they allow participants to contribute to the strategy process anonymously (Malhotra et al., 2017). Hence, middle managers' activities of influencing clandestinely or even taking over activities from anonymous participants will be restricted. This implies that middle managers might not be able to (re-)construct their position in the same way as with known participants. Finally, digital modes of participation might not require any support from the middle managers during the strategy process or might not even allow them to participate at all. If middle managers are excluded from the strategy development process entirely, their struggle to reclaim their subject position might even intensify and direct the middle managers to entirely different types of influencing activities. Overall, future research might examine and compare the implications for middle managers' subject position based on digital modes of Open Strategy, particularly with regard to the inclusion of larger group of actors and the enabling function of anonymous participation.

The third boundary condition concerns the particular selection and involvement of the middle managers in the Open Strategy process. In our study, 11 middle managers were selected to support the employees in their strategic activities, and on which we focused our analysis. This subgroup of middle managers and their respective behaviours might be particular in two respect. First, the decision on which middle managers to include in the participatory strategy process was probably influenced by earlier experience with these persons. Thus, the middle managers we observed may have been more active and motivated than the average middle manager in the organization. Accordingly, the middle managers reactions we found might have been more pronounced than if less active and motivated middle managers had been included. Second, those middle managers that we studied were all directly affected by the inclusion of the front-line employees in the process, while the rest of the middle managers in that firm might not have been explicitly exposed to the effects of that inclusion. We therefore claim that the dynamics we found for reclaiming a subject position as strategist applies to middle managers whose known strategic activities, and hence subject position are threatened by an Open Strategy process. In addition, middle managers who are assigned clearly-defined, alternative strategy roles (Dobusch et al., 2019; Hautz et al., 2019) may be less focused on reclaiming their subject position or may display different struggles over assuming new subject positions. Thus, future research might examine the implications for middle managers' struggle over their subjective position if they are assigned clearly-defined roles in, or if their known strategic activities are not threatened by, an Open Strategy processes.

Finally, our paper provides additional avenues for further research. First, we focus on middle managers' struggles when faced with widening participation during the process of developing the strategy. Further insights into these struggles might be gained if the

implementation of that strategy is considered as well (Weiser et al., 2020). Previous studies have argued that strategy implementation is facilitated through Open Strategy because actors will be more committed to implement change (Matzler et al., 2016; Stieger et al., 2012; Whittington et al., 2011). Thus, future research might examine how widened employee participation and the related struggles of middle managers to reclaim their subject position shapes the commitment of these different actors when implementing the strategy that is developed. Second, our study focuses on the implications of widened participation for middle managers' subject position as strategists, paying less attention to the participating employees' reactions to the middle managers' attempts at reclaiming their subject position aside. Thus, future research could examine the effects and reactions of employees to middle managers' attempts at reclaiming their subject position in Open Strategy contexts. In this respect, future research might also compare the reactions of employees that are more or less experienced with Open Strategy processes. Third, we examined an Open Strategy initiative that was practiced for the first time in this company. Thus, the top management was not experienced in designing the Open Strategy process and did not anticipate how the middle managers were affected by the design. Future research could thus examine whether the dynamics that we have identified would also apply to contexts in which an organization has experience with widened participation. For example, if top managers had been more experience in setting up such participatory processes they might have tried to define upfront what activities were to be performed by which actors, such that the different groups would not undermine each other's participatory activities.

Finally, various studies have observed that organizations are increasingly restructuring their strategic planning process to include actors that were previously excluded from the strategy process (Hautz et al., 2017; Seidl et al., 2019; Whittington et al., 2011). Even though widened participation is a specific phenomenon, it might be related to other recent trends towards structural transformation, such as agility management (Doz et al., 2008), flat hierarchies (Parker, 2012) or holocracies (Robertson, 2015). Future research might examine the effects of such other new trends on middle managers' struggle over their subject position and compare the dynamics of middle managers' attempts at reclaiming their subject position in light of these different trends.

## NOTE

- [1] The MMs were assigned to these groups according to their general level of expertise but not necessarily according to their current professional work in the topical area. As 11 MMs had to be assigned to eight working groups, three groups (customer, distribution and operations & technology) were supported by two MMs because these were wider in scope and thus needed more support than the other areas.

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**APPENDIX A.** Additional evidence

<i>Conceptual dimensions</i>	<i>Second-order themes</i>	<i>First order concepts</i>	<i>Vignettes and exemplary quotes</i>
Maintaining subject position	Influence downwards	Guiding and steering employees' discussion around specific strategic topics	<p>In one of the discussions among the members of the commercial and the retail customer segment, one of the employees explained to the MMs the advantages of having a risk manager who is specialized in certain industries, which would differentiate the company from other companies. MM Peter found this point very interesting and related it to some overall strategic issue (being consistent) in the commercial customer segment. However, this issues seemed also important for retail and thus Peter steered the employees to also evaluate what consistency means in this segment. MM Francis leading the working group said: 'All of this [makes very much sense and I would say it] goes back to, "you make a promise", "you have to deliver it", "We have to be consistent", [...] all of that'. After some discussion that a specialized risk manager would help to increase consistency towards the customer, Peter advised the employees to also look into retail since consistency seems to be an emerging strategic issue across the working groups. 'I think, in the case of retail, it seems much more urgent or really life or death [to increase consistency], kind of something that we need to fix very quickly. [...] So can you also think about things we can improve in retail to be more consistent'.</p> <p>In one of the first MM meetings, MM Robin explains to the other MMs how he would explain to the CEO the topics that the employees would present during the CEO meetings: 'So when I go back to the team, I would place together these things [based on what they have been discussing in the meeting]. First, narrow down the number of ideas, and let them be bolder, kind of carve out the ones that [can appeal]'. The other MMs nodded to show their agreement and MM Barbara added: 'True. The time is short so we need to steer them [the employees] closely to progress quickly'.</p> <p>In one of the meetings in week 4, the MMs leading the customer working group discussed which of the employees' ideas they should integrate in the presentation to the CEO the other day, thereby evaluating one of the employees' ideas for the CEO. MM Peter wanted to discuss an idea initially developed by one of the employees: 'What about [including in the presentation one of the employees' ideas that] in commercial, he said that a lot of countries [have] expense rate problems and ratios?'. MM Francis was rather sceptical about the idea to include this idea: 'We have an expense issue [overall] but the point is, do you want to have a discussion with him [the CEO] right now to say specifically expenses is [problematic]?'. MM Martin who came to support them in developing the presentation suggested: 'Can we just [put it together with the overall point on] financial performance? I mean, basically, we're saying they don't meet the hurdle rates down. In general, there's lots of ways we could deal with that, right?'. Then the MMs agreed that the idea should be included but, also, that it should not be overemphasized in the presentation to the CEO the other day.</p>
		Acting as intermediaries between the CEO and the employees	
	Influence upward	Interpreting and evaluating employees' information for the CEO	



APPENDIX A. Continued

Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
		Championing new strategic alternatives	<p>In one of the interviews with MM Nathan at the beginning of the strategy process, he explained how the MM champion new strategic ideas: 'So we've had one specific idea for retail that we developed by splitting up [the employees in this working group] in order to work on a [new governance] model. I've discussed the model with them last week and I didn't have to change much because I liked it. And now, [after the feedback from the CEO to which the idea was presented] we need to rework the model again and then we will present it in the next steering committee. This is how I see how the process should work. You've seen it last time in the steering committee when the CEO said ['don't develop ideas that we cannot execute']. What should I have said to this? It is hard to argue analytically [in such situations]. But you could, as I also did in this case, argue that I just don't accept that retail is in a miserable condition. [And now] it's on us to convince him that we can execute the new [governance] model'.</p>
		Coordinating between working groups	<p>In one of the MM meetings in week 6, the head of strategy raised whether the MMs want to keep the customer segmentations, i.e., corporate and commercial and retail, as separate approaches to develop the strategy or whether to coordinate more closely. The MMs thought that it is better if they coordinate among the working groups. MM Rose explained her view: 'The question to me is [...] have we derived all the value from [all working groups]? My answer is no. [Because] I think there is still some work to be played out [in terms of getting] the dynamics across the [working groups] working. [...] What we need to do is work out how it's in parallel coordinating which is either around custom grouping which you suggest or [something else]'. MM Isaac agreed and stated that he prefers coordinating around customer segments: 'I believe there is a big value in bringing the teams together and starting to focus across the value chain on different customers'. After some discussion among the MMs, the head of strategy agreed that the MMs would get more time to coordinate across the working groups.</p>
Restriction of subject position	Turning MM into supporters	Assigning MM the role of supporters instead of strategic actors	<p>In one of the interviews with the CEO, he made clear that the MMs were assigned the role of supporters in this process. However, they were not taking on this role, as the CEO explained: 'So you have to make a choice, right? So you could say that the strategy [is] made by the executive committee and the regional CEOs [...] And this is one choice. So the strategy is made by 10 people who are far distant from the business. Or you can go the other way, which is the one I choose, to make the strategy with young people working in the [businesses] with the support of some [MMs]. What happened [however] was that a number of [MMs] just shoot against it [taking on their role] from the beginning, so they were opposing everything in principle because they didn't like the openness and the approach [that I chose]'.</p>

APPENDIX A. Continued			
Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
		Assigning MM the role of facilitators instead of strategic actors	<p>In one of the interviews with the head of communication, she explains that it was decided to set up a social media-like tool within the organization to keep all organizational members informed about the strategy process. To answer specific questions by organizational members, she had asked some of the employees to join a virtual Q&amp;A session to report about the process and answer the main questions. However, the MMs were not supposed to answer questions and report about their experience in the strategy process. Instead, they could facilitate that the employees of their working groups had time to join these virtual sessions with the rest of the organization. The head of communication explained this as follows: ‘We’ve created a Yammer platform [the social media-like tool] for the other people in [the company]. And that group has about 1650 active members. [...] So the idea is to take that engagement and enthusiasm [of the employees] and then go back and show their work to the rest of the organization. [...] It’s not just kind of showing who is involved as well like the [MMs]. We thought it doesn’t make sense to involve them as well as the employees are really at the centre [in this Yammer group].’</p>
		Marginalizing Forbidding MM to speak in main meetings	<p>In an interview, one of the employees admitted that she was quite annoyed that suddenly the MMs were not supposed to speak, and thus also not to present in the CEO meetings anymore. The reason why she was annoyed was that the employees, such as herself, had to spontaneously present parts of the presentation. ‘The entire week [the MMs] told us that [they] are presenting to [the CEO] and then on Wednesday night, the night before the presentation, [the CEO] changed his mind [i.e., he forbid the MMs to present and speak in the meetings with him] and then they needed some [employees] to present’. In another interview, another employee shared her thoughts why the MMs were not allowed to speak in the meetings anymore. ‘It was interesting that [it was decided] that the [employees] should speak more [...] because at the moment we feel the strategy is developed by key people [i.e., the MMs] if you compare the time that we speak [in the meetings with the CEO] to the time the [MMs] speak I think it’s 70 per cent the [the MMs]’.</p>

APPENDIX A. Continued

Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
		Taking away coordination of strategy work across working groups from MM	<p>In one of the MM meetings in week 12, the head of strategy told the MMs that he wants the internal consultants to take over the coordination across the working groups, which was so far coordinated by the MMs. 'I think what [the internal consultants] need to do now is take everything we discussed [in each of the working groups] and go back and rewrite the [strategy story across the issues of all working groups and then because] our business speaks end-to-end, I think that's why we are here because most of us [the head of strategy and the MMs] have been running businesses or are in business. So, we can [still] talk why [working group related issues] work'. While the middle managers looked quite astonished, one of the consultants asked a follow up question regarding the setup of the agenda for the next CEO meeting: 'Fine [with me], still I want to [...] make sure that we have an agenda. Would [the single working groups still] be part of the agenda for the 14th of July [the date of a meeting with the CEO], yes or no?'. The head of strategy confirmed what he had said before: 'No, the whole agenda has to be revised. We need to see how we deal with the new agenda if you [the internal consultants] coordinate the work [across the working groups]'.</p> <p>In one of the MM meetings in week 13, the head of strategy explained to the MMs why they would play a marginal role at the leadership meeting and how this role could look like. 'I think it's really that he [the CEO] wants [...] the young ones [the employees] to talk about [the strategy, not you, the MMs]. But you know that we really have some colleagues who will be sarcastic and will do stupid remarks and then [you could still play an active role at the leadership team meeting that] if [the employees] cannot handle themselves, you step in and put them in the right place'. MM Clarke rephrased what the head of strategy had said to clarify: 'So wait. Our role will be to [watch] like our leadership team members and if we see one of [the leaders] either misunderstanding, or misbehaving, or whatever we actively support the other members of the task force in their [role]'. The head of strategy confirmed: 'Yes, we're supporting them. It's not [that you will] give the message. Because the message should really come from [the employees]'.</p>
		Marginalizing MM at the leadership meeting	

APPENDIX A. Continued

Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
Reclaiming subject position	Clandestinely influencing the strategy process	Coordinating and synthesizing working groups in the background	<p>In the week after it was decided that the MMs were not supposed to speak in the CEO meetings anymore, the MM discussed how they should deal with evaluating all the ideas from the employees because they had the feeling that they need to coordinate the strategic foundation in the background first (before they can examine all the ideas). The CEO however wanted to hear more ideas from the employees, as one of the internal consultants told the MMs in one of their meetings in week 6. ‘[The CEO mainly] talked about new ideas because a lot of feedback that we got [from him was] that we need to have more ideas which should [come] from the juniors [i.e., the employees]’. MM Clarke replied, [But we, as the leaders of the working group] we have the opposite problem. We’ve got a whole bunch of ideas, and we didn’t even go through them all. We got tons of unique, really cool ideas, and we plan to build them all out. What’s missing from us [and what we as leaders need to coordinate now in the background] is, we have something up here, we have a bunch of stuff down here; we didn’t actually build [...] up a strong enough foundation that then we can go off and do these other really cool ideas. [...] And then [when we, the MMs, have developed such a foundation], the employees can tell the CEO ‘Oh, by the way, there’s a 5-year horizon and a 10-year horizon, and those will be some unique, cool ideas’. [...] So then, how do we now go back and say to them [the employees], ‘By the way, come up with some new ideas’, because we need to fix the foundations among us first’.</p> <p>After one of the CEO meetings in week 8, the MMs came together with the head of strategy to discuss the main criticism that the CEO had raised. Regarding one particular issue, to use a software provider as a best practice for measuring customer touchpoints, the MMs discussed how they can ignore this point without making the CEO realize that they think it is not worth further investigating this issue. MM Martin kicks off the issue: ‘This is the second steering committee where [the CEO has] mentioned Metalia [the software company]. Do we just ignore it, or do we build it in to one of the stories?’ MM Maria replied: ‘It’s just a provider of a software tool! And they rate us based on feedback, and [...] it’s just, I think [we can ignore it] right way’. However, Martin reminded that they still need to incorporate it somehow so that it does not make the impression as if the MMs are against using the software provider as a best practice. ‘I think [in order to make it appear more relevant we need] to link it to something more fundamental. I can see what you’re saying about the customer. [...] I’m just saying we need to integrate it somehow.’ Maria agreed, so the MMs continued to think out loudly: ‘I just wondered whether or not you make it more of a retail story which is allowing us to consistently measure customer feedback [so indirectly referring to the software company]’. At the end of the discussion, the MMs said that they would relate it to the retail strategy story but not mention the software provider any further.</p>
		Developing tactics to disguise influence	

APPENDIX A. Continued

Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
		Instructing employees to communicate important strategic topics to the CEO	After the MMs had heard that they were not allowed to talk in the CEO meetings anymore, the MMs still exerted influence on the strategy process by instructing the employees which issues to communicate to the CEO. In an interview, one of the employees provided an explanation for the MMs reaction to being restricted in their activities. 'People tend to be driven by career aspirations. [...] so everyone wants to be relevant in whatever they are doing, no? [...] So for the [MMs], it's a platform [...] for their career growth. So I think that they spelling things out for us that [...] they think are important for them [or for the CEO who will then] be putting money into these things. [...] They – I don't know if it was [this MM or the other], they discussed that they actually need to let us sit in the – well, not sit in the driving seat, but at least, be in the front seat'.
		Indirectly influencing the content of strategy communication	In one of the discussions in the customer working groups in week 14, MM Francis who lead the customer working group explained to the employees what is expected of them from the leadership team meeting and how the MMs will help the employees in preparing to give the 'right' answers. 'You'll have 15 minutes to share key content about the commercial part of the strategy. [...] So how can we make sure that [the executives] understand it and have some energy on that commercial piece. [...] The [executives are] going to ask you as if you are a leadership team member responsible for delivering the messages and helping to execute. [So we, the MMs leading this working group will prepare you for] what you would say. And we're doing that because that is the takeaway that the leadership team member can then have to say, "I get it. This is how I should be thinking, responding, etc." [...] And for you to be able to put yourselves in the shoes of the leadership team members the way we want the part of the strategy to be talked about and ultimately executed'. In preparing the employees for the big day of the strategy announcement, the MMs indirectly influenced what is said about the commercial strategy but also how it was communicated.

APPENDIX A. Continued

Conceptual dimensions	Second-order themes	First order concepts	Vignettes and exemplary quotes
	Taking over activities from other participants	Taking over the design of the communication of the strategy	<p>After the MMs had heard that the overall coordination across the working groups was taken away from them, the MMs tried to still influence the strategy process by designing the communication of the strategy. However, the design of the communication of the strategy was the area of responsibility of the head of communication. Thus, in one of the MM meetings in week 16 the MMs explained to the head of strategy how they would design the communication in order to get their messages [which they had developed in their working groups]. MM Robin explained to the head of strategy ‘What we are saying [is that there are] these four [working] groups, right? And for each of these four groups, we have a content focus. [And for each group we will have] an introduction. [But] the hardest piece is this one. Are we having three questions to answer? [...] Because we are now talking in four different content categories. Or because if not, where will this lead us towards? Then not all groups will answer the same questions’. To the MMs it was quite clear that they would design the communication as they had also developed the content of the strategy. Accordingly, MM Marvin shared his idea how the strategy should be presented to the executives. ‘So take the commercial team. They will be presenting commercial four times. First time they present, they’re going to be asking that group [of executives] that comes in, “What does it mean for me?”. The second group that comes in answers the question, “What will I prioritize focus on?”. The third group that comes in focuses on the third question. And then what you will have then is answers to four questions when all of this is done, but they will have been answered by different groups of people’. Without letting the head of communication getting a chance to speak, MM Marvin raised his scepticism about this idea because it does not allow the executives to get a holistic picture of the strategy that the MMs want to get across. ‘You can do it like this [...] We get answers. Yes. And at the end, we stitch it together. But the guys who run through [i.e., the executives] don’t get a holistic experience [which the middle managers want to get across]’.</p>