Themed Issue: Methodological pluralism and innovation to advance strategic organizations research in organizations and fields.

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Strategic Organization (SO!) launched its first issue 20 years ago with an explicit commitment to developing theoretically and methodologically pluralist research that sat at the intersection of, and helped integrate, the increasingly divergent fields of strategic management research and organizational theory (Baum et al., 2022). Over the past 20 years, this pluralism has enabled creativity and innovation in the work published in the journal. The methodological pluralism also sets it apart, in particular, from journals in strategy. This pluralism is something that is nurtured explicitly in the journal's editorial process. Features of this process, including the one major revision policy, and an editorial process that is attentive both to the author's voice, and for empirical pieces, the voice of the data (Because data speaks! We cannot let established theory prevent us from hearing!) are, in the editorial team's view, sources of innovation.

The pieces in this issue reflect this commitment to pluralism and the author (and data's) voice. In addition, they are testament to the idea that leveraging pluralism is a way of advancing theory. Two of us collaborated on this piece from the perspective of a co-editor at SO! (AN) and from the perspective of a junior scholar of strategic organization whose research programme takes a methodologically plural approach (MG). Both of these perspectives were essential, in particular, for situating the specific papers in this issue into a broader reflection on the values of pluralism.

Introducing the papers

Three articles in this issue explore field dynamics and how they shape outcomes in fields, contributing to work at the intersection of institutional theory and strategy. Punt and colleagues (2023) use an institutional theory lens and event history analysis to look at the location decisions of platform companies, which are “born global” and have the ability to expand to a multiplicity of locations within a short period of time. By looking at the role of informal institutions, this piece complements prior research, which predicts that traditional multi-national corporations will locate in new locations that are institutionally similar to their home location, in terms of formal economic and political institutions. Specifically, it shows that Uber is more likely to locate in cities that are more exposed to customers visiting from locations where it already offers services. This suggests that customers, and their mobility, can be carriers of informal legitimacy that makes it easier for platform companies (i.e., Uber) to locate in a particular market.

Topaler and colleagues (2023) explore how organizations draw on features of existing ancestral identities, and features that may differentiate them from all ancestral identities in a field, in ways that craft new identities that might appeal to important audiences. Using qualitative comparative analysis (QCA) of university identities in the field of Turkish higher education, they show that organizations can adopt a wide range of combinations of features. These combinations of features can vary in terms of how distinctive they are compared to existing identities in their field. However, distinctiveness alone cannot explain which identities appeal to different audiences as organizations that are relatively indistinct in terms of their features may nevertheless be appealing. Rather, it is the specific combinations of features that shape an organization’s appeal. By focusing on combinations of attributes, the piece builds on an emerging body of work that seeks to move beyond the dualistic thinking that focuses on optimal distinctiveness as the appealing strategy, where conformity with templates confers legitimacy, while differentiation gains attention in a competitive space.

Finally, Endenich and colleagues (2023) explore an empirical puzzle in a particular field – trying to understand why firm's adoption of integrated reporting—reporting that combines measures of financial and non-financial or social performance—stalls, despite strong support from important field actors, and being consistent with the growing zeitgeist in favour of sustainability. They draw on interviews conducted as part of a broader research programme involving field immersion to explore their research question. Their work contributes to research on practice adoption (which explores substantive, symbolic, and more recently partial adoption of practices) by identifying wait-and-seeism as a potential alternative adoption approach. Given scepticism about the target group of the new practice, tangible costs of adoption, and unclear benefits, firms take a temporally stretched approach. They monitor developments in the field related to integrated reporting and maintain efforts to prepare to adopt the practice if needed. However, they contain their efforts, and avoid over-investing. They work suggests that many practices may remain in this liminal space with firms not truly adopting practices, while preparing for the situation where they may need to.

Three articles look at phenomenon at an organization level, with a fourth looking at inter-organizational collaborations. Lyle and colleagues (2023) examine the persistence of organizational imprints over time. They extend prior work by looking at the role of newcomers. They ask how new organization members discern meaning in existing imprints in the organizations that they join, and whether their discernment of meaning influences the imprints themselves. Developing a qualitative case study of a home health agency, they show that newcomers discover imprints that were clearly relevant at the organization's founding, but perhaps less necessary when they joined. They verify these imprints in their conversations with veterans, and then personalize their meaning. This personalization informs actions to enact the imprints in their work, in their affective commitment to the organization, and in their selection of new hires. Their work extends research that explores the meaning of imprints beyond the period of founding (Johnson, 2007) by uncovering a mechanism by which imprints can persist over time with changing meanings and imbued with emotional valence.

De Keyser and colleagues (2023) speak to the strategy as practice literature by exploring the emotional dynamics of strategy processes that are guided by external strategy consultants. They add to work looking at emotions in strategy processes by specifically examining the emotional dynamics of strategy led by outsiders. They unpack an emotional journey by which senior managers who interacted with consultants transitioned from positive emotions that were based on conjecture and the status of the consulting firm, to negative emotions based on disappointment with the reality of their interactions, to positive emotions when they reinterpreted their experience post-hoc, as they came to sell publicly the strategy they developed. The piece adds to our knowledge of consultant-led strategy processes by truly unpacking the emotional dynamics of the process as it unfolds, and by showing how, counterintuitively, a process that is perceived negatively in the moment can be retrospectively remembered and sold positively.

Skov and colleagues (2023) also engage with the strategy as practice literature by developing an ethnographic study of strategy processes in a Danish school. They contribute to research on the role of meetings in the strategy of practice by looking at how interactions within and between meetings can impact one another in ways that shape what happens in strategy processes. They show that managers orchestrate interactions within meetings, as well as in interactions that are between meetings. Between meetings they strategize how to manage the meeting, and build allies to help them shape the flow and outcome of the meetings themselves. They also balance across meetings in different issue domains, creating, for example, openness in meetings in one issue domain to balance out restrictiveness in a different issue domain. This piece builds on research highlighting the importance of meetings in strategy processes to show how meetings are situated in broader interaction chains. At the same time, these broader interaction chains can be consequential in shaping the strategy processes that occur within meetings.

Nathues and colleagues (2023), looking at the level of inter-organizational collaborations, draw on discourse analysis of team meetings to examine how collaborative strategy is authored in teams that lead inter-organizational collaboration. In doing so, they explore issues related to who can speak in the name of a new collective and decide what it does, and how this ability comes into being. Informed by a communicative constitution of organizations perspective, they develop a ventriloquial analysis of communication—where people invoke the voices of actors not present including their own organizations or abstract principles. Using ventriloquial analysis, they show how people can enlarge their own voice by invoking additional voices, including the voices of organizations. However, they also show how people can impact what a collaborative does by detaching from the collective and its emerging direction, and instead speaking as individuals. The work shows how people use discourse to appropriate the voice of the collaborative and silence others. They contribute to strategy discourse and process research by suggesting that strategy is a relational assemblage of language. This involves different actors moving together, in part by some people silencing alternative voices and appropriating for themselves the role of representing the collective. It can also involve actors moving apart and challenging the emergent strategic direction. This can involve taking other voices brought in ventriloquially with them. The piece offers a truly novel approach to thinking about and studying inter-organizational collaboration, which would only emerge with full embrace of both methodological and theoretical pluralism.

Two So!apbox Essays round out the issue. In their So!apbox Essay, Brielmaier and Friesl (2023) draw on the attention-based view to extend the literature on open strategy processes. By framing participation in OS as the outcome of attention contests between the OS initiative and the organization, this essay offers a novel perspective on what influences participation in OS. The rules of the game, structural positions, resources, and players of OS initiatives are at odds with those of the organization. This creates attention contests related to process ambiguity, status transition, use of attentional resources and identity shifts that prevent participation in OS. With its novel perspective, this essay differentiates between inclusion and participation and let us rethink the role of inclusion as a “moral intent” and an offer made by the organization to organizational actors. Participation is then the act of taking up the offer and the condition allowing the benefits from OS to materialize. In discussing how and why participation in OS takes place, the authors suggest that attention distribution mechanisms such as immaterial incentives, anonymity, and exclusion of high-power actors to create an open organizational climate are important in facilitating participation in OS. Ease of use is also a critical design feature that can be used to facilitate participation in OS.

The final So!apbox Essay in this issue by Grewatsch and colleagues (2023) perhaps best speaks to the value of pluralism that helps define this journal. This essay argues for a systems thinking approach to strategy research on climate change and other wicked problems. The authors define wicked problems as problems that have no clear boundaries, and non-linear dynamics, and argue that they cannot be explored through narrow, reductionist lenses. They outline the principles of systems thinking as a way forward for strategic organization research. These principles include conceptualizing the world as a network of interconnected relationships that lead to dynamic stability, conceptualizing systems as open with unclear boundaries, positing that interactions can help parts become whole through synthesis, and noting that feed-back loops can lead to unpredictable and non-linear outcomes. Some of the themes that they advocate for, i.e. a focus on interactions that shape stability and change in social systems or theories that are truly open-system, are themes that are across the pieces in this issue. To us, the essay is a call to truly embrace a pluralistic approach if strategic organization research, as a field, is going to really make progress in advancing work that might help conceptualize and tackle societies pressing wicked challenges.

Pluralistic approach

So what does a pluralist approach, a foundational premise of the journal, really add? In this essay, we argue that a pluralist approach has value for individual papers, for authors and for the field more broadly.

Value of pluralism in specific papers

The value of pluralism in specific papers should, we hope, be clear. Theoretical and methodological plurality make distinctive contributions possible. This is true for the papers included in this themed issue. For example, Nathues and colleagues (2023) leverage both theoretical and methodological plurality to make a distinctive contribution to research on inter-organizational collaboration. Ventriloquism in communication, developed through discourse analysis, is not exactly a common or well-trod theoretical theme in this field of research. The use of this lens enables them to show how different voices shape the strategy making process and how individuals speak not only with their own voice but also with the organization's voice, akin to a ventriloquist speaking through a puppet.

Letting the data speak through different methodologies also contributes a more nuanced picture of existing phenomena. For example, Topaler and colleagues' (2023) use of QCA and their theoretical approach focusing on how organizations might distinguish themselves from the full set of institutionalized identities in a field made possible a contribution that focuses on how combinations of features can shape whether an identity is appealing, moving beyond the duality that focuses on the tension between needing legitimacy and needing distinctiveness. The empirical approach also allows us to see more clearly the equifinality of outcomes. That is, quite varied combinations of attributes can result in identities that are appealing to key audiences.

Value of pluralism for authors

Using a plurality of theoretical lenses and methodologies allows authors to embrace their creativity and to follow their personal passion for a research question and/or phenomenon. Authors can take different paths to unleash their creativity, as illustrated by many of the papers in this issue.

With a pluralism of theoretical lenses and methodologies we can examine known phenomena using new perspectives as Punt and colleagues (2023) do to show the role of informal institutions on the location decision of Uber. Pluralism also allows us merge existing phenomena and perspectives in creative ways. For example, Brielmaier and Friesl (2023) creatively combine the attention-based view and theories of OS to illuminate new aspects related to participation in OS. Embracing pluralism as an author can assist us even more when we research new phenomena. Endenich and colleagues (2023) provide an example of this undertaking. By looking at the emerging phenomenon of integrated reporting with a practice adoption lens they show why adoption of practices may stall.

Pluralism is enabled by and, at the same time, enables the use of new types of data, the use of existing data in new ways, and access to new contexts. Whether it is the use of historical records to study the micro-history of a phenomenon, or the use of large-scale datasets analysed using AI and machine learning, combining new sources of data with pluralism allows authors to study new contexts or new phenomena they are excited about. Finally, the use of multiple methods within the same study is perhaps the hallmark of a pluralistic approach. Freed from the ties of a unique method, authors can leverage the advantages of different types of data and different methodologies to unpack their research questions and examine different aspects of an empirical or theoretical phenomenon.

Value of pluralism for the field

While pluralism clearly creates value for authors and their papers, allowing the creation of distinctive contributions, we argue that it generates value also for the broader field of research at the intersection of strategy and organization, broadly defined. It helps generate value for the field both by strengthening existing knowledge and extending it. A plurality of approaches allows diverse researchers in a field to both ask and answer different types of questions, from different angles on a phenomenon. By taking a pluralistic approach, we can deepen our knowledge of a phenomenon. For example, Skov and colleagues help us gain a deeper understanding of meetings in strategy making by using a processual-interactionist approach. In a similar vein, the piece by De Keyser and colleagues (2023) gives a deeper perspective on the role of emotions in strategy making when consultants are involved in the strategy making process. Akin to the pieces of a puzzle, pieces examining different angles on a phenomenon helps us build a more complete picture.

While adding depth to our knowledge of a phenomenon is critical to develop robust knowledge, a pluralistic approach also adds breadth by expanding the boundaries of what we know. When taking the perspective of actors not considered before, as done by Lyle and colleagues (2023) in their study of how newcomers in an organization understand and use imprints, the use of pluralism can open up interesting avenues for new research.

Conclusion

In this editorial and themed issue of Strategic Organization on “Methodological pluralism and innovation to advance strategic organizations research in organizations and fields”, we argued that theoretical and methodological pluralism enables creativity and innovation in the research community to create distinctive contributions, pursue exciting research questions, and as a result to create more robust knowledge. Whether it is work exploring how customer mobility can impact where a platform firm would locate, or how interactions around different issues, and in processes that link meetings, the principles of system thinking proposed by Grewatsch and colleagues (2023) in this issue are echoed, implicitly and explicitly, across the papers in this issue. Given the complexities of organizations and fields, embracing the principles of systems thinking may be a sensible approach for orienting research at the intersection of strategy and organization. The pieces in this issue help underscore that the embrace of pluralism, both theoretical and methodological, can be important in creating space for these principles to be embraced and explored. We hope our insights as author and co-editor, as well as those of the authors in this themed issue, will convince you to extend your research toolkit to embrace theoretical and methodological pluralism.

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