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Research Article

A Qualitative Method Proposal for the Study of Strategy as Practice

Uma Proposta de Método Qualitativo para o Estudo da Estratégia como Prática



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ABSTRACT

Purpose: recently, the strategy as practice approach has sought to overcome the micro/macro dichotomy existing in its literature, as well as to better integrate the dimensions of praxis, practice and practitioner. To fill this gap, the aim of the paper is to discuss potential methods to guide empirical studies of strategy as practice (SAP). **Method:** the paper proposes a method based on an extensive literature review. Phenomenology, grounded theory, ethnography, and narratives are discussed, and their components are presented in the context of strategy as practice studies. **Results:** the presented method articulates four approaches. Phenomenology is used to enhance the understanding of strategist experiences. Grounded theory is considered a method to develop theories about the studied phenomenon. Ethnography is used to contextualize the daily practices of strategists. Narratives are the path to access the stories of the strategists. **Conclusion:** the proposed method may be useful to overcome micro/macro dichotomy existing in strategy as practice literature and to integrate praxis, practice and practitioner dimensions.

Keywords: strategy as practice; ethnography; grounded theory; narrative; qualitative research.

RESUMO

Objetivo: recentemente, a abordagem da estratégia como prática tem buscado superar a dicotomia micro/macro existente na sua literatura, bem como integrar melhor as dimensões da práxis, prática e praticante. Para preencher esta lacuna, o objetivo deste artigo é discutir potenciais métodos para guiar estudos empíricos de estratégia como prática. **Métodos:** com base em uma extensa revisão de literatura, desenvolvemos um método baseado na fenomenologia, na teoria fundamentada, na etnografia e na análise de narrativas. Esses componentes são apresentados e discutidos no trabalho tendo em vista o contexto dos estudos de estratégia como prática. **Resultados:** o método apresentado envolve a articulação de quatro abordagens. A fenomenologia é usada para ampliar o entendimento a respeito das experiências dos estrategistas. A teoria fundamentada é considerada como um caminho para desenvolver teorias sobre o fenômeno estudado. A etnografia é empregada como um meio para contextualizar as práticas diárias dos estrategistas. Por fim, as narrativas são o caminho para acessar as histórias dos estrategistas. **Conclusões:** o método proposto pode ser útil para superar a dicotomia micro/macro existente na literatura de estratégia como prática e para integrar as dimensões práxis, prática e praticante.

Palavras-chave: estratégia como prática; etnografia; teoria fundamentada; narrativas; pesquisa qualitativa.

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INTRODUCTION

In the last two decades, strategy as practice (SAP) has emerged as a distinctive approach in strategic management (Golsorkhi, Rouleau, Seidl, & Vaara, 2010; Jarzabkowski, 2005; Jarzabkowski, Balogun, & Seidl, 2007; Jarzabkowski & Spee, 2009; Johnson, Langley, Melin, & Whittington, 2007; Johnson, Melin, & Whittington, 2003; Vaara & Whittington, 2012; Whittington, 1996). Since its inception, it has been positioned as an alternative to the mainstream strategy research and as a more comprehensive analysis of what takes place in strategy planning, implementation, and other activities that deal with the thinking and doing of strategy (Golsorkhi et al., 2010). Researchers' attention has shifted from strategy as something that an organization has (or should have) to strategizing as a process, that is, an everyday practice understood as the doing of strategy (Jarzabkowski et al., 2007; Johnson et al., 2003; Whittington, 1996). The key insight of SAP studies has been the idea that strategy work relies on organizational and other practices that affect both the process and the outcome of strategies (Jarzabkowski et al., 2007; Jarzabkowski & Spee, 2009; Johnson et al., 2003; Vaara & Whittington, 2012). This conceptual reorientation offers the possibility of a deeper level of explanation regarding the nature of strategic activities "because it focuses research attention on the situated social practices that are enacted and re-enacted in the doing of strategy" (Rasche & Chia, 2009, p. 713).

Currently it is possible to find under the label of strategy as practice a wide variety of theoretical essays and empirical research (Golsorkhi et al., 2010; Jarzabkowski et al., 2007; Jarzabkowski & Spee, 2009; Johnson et al., 2007; Vaara & Whittington, 2012). Due to the empirical effort already made, we know a lot about how top managers strategize (Jarzabkowski, 2005), how boards do strategy (Hendry, Kiel, & Nicholson, 2010), and how middle managers can and do contribute to strategy making (Rouleau, 2005). From the theoretical point of view, different articulations have already been built between SAP perspective and theories of practice (Golsorkhi et al., 2010; Seidl & Whittington, 2014): Jarzabkowski (2005) explored activity theory; Whittington (2010) discussed structuration theory; Denis, Langley, and Rouleau (2007) pointed the potential contributions from actor-network theory, theories of social practice, and convention theory; Suddaby, Seidl and Lê (2013) unveiled different ways in which neo-institutionalism and SAP could complement each other.

Regarding the method aspect, explicit contributions have been relatively less common (Golsorkhi et al., 2010). Balogun, Huff and Johnson (2003) published the first paper to address this issue directly and suggest specific method approaches (interactive discussion groups, self-reports,

and practitioner-led research). Johnson, Langley, Melin and Whittington (2007) dedicated a chapter providing illustrations of important method choices and their respective advantages and disadvantages. Golsorkhi, Rouleau, Seidl and Vaara (2010) presented five different methodological tracks in strategy-as-practice research. To date, with respect to data production, strategy-as-practice researchers have shown a strong orientation toward qualitative methods.

Although many theoretical advancements have been made (e.g., Gehman et al., 2018; Golsorkhi et al., 2010; Jarzabkowski, 2005; Jarzabkowski et al., 2007; Johnson et al., 2003; Seidl & Whittington, 2014; Tsoukas, 2018; Whittington, 2006), what has proven more difficult for strategy-as-practice researchers is applying these theoretical resources in systematic empirical research (Seidl & Whittington, 2014; Vaara & Whittington, 2012). Therefore, novel methods techniques that can capture the depth of the strategizing process are still needed (Jarzabkowski et al., 2007; Vaara & Whittington, 2012). This call for innovative approaches does not necessarily mean that we have to develop entirely new methods. It suggests, rather, "that we look at them through a 'practice lens' and use innovative ways to approach managers and reconstruct their strategizing activities and roles" (Golsorkhi et al., 2010, p. 10).

In this sense, the paper aims to discuss potential methods to guide empirical studies of SAP. We will develop the method based on four research traditions already used in practice based empirical studies. Although they are not novel, they will be linked in a complementary way, through a strategy-as-practice lens. We propose a framework that brings together: Heidegger's interpretative phenomenology (Chia & Holt, 2006; Gill, 2014; Küpers, 2009; Tsoukas, 2010), ethnography (Atkinson, Coffey, Delamont, Lofland, & Lofland, 2001; Cunliffe, 2010, 2015; Rasche & Chia, 2009), narrative of practice (De La Ville & Mounoud, 2010; Fenton & Langley, 2011; Laslett, 1999; Rouleau, 2010), and grounded theory (Bryant, 2017; Charmaz, 2000, 2006; Corley, 2015; Goulding, 2002; Hendry et al., 2010; Strauss & Corbin, 1998).

We argue that these research traditions taken together constitute a multifaceted approach contributing to enrich the methodological strategy-as-practice agenda in two complementary ways. First, it reinforces the need to align methods approach, theoretical choices, and onto-epistemological assumptions that guide the fieldwork. Our proposal resonates with recent calls for more ontological and epistemological depth in SAP research (Chia & Rasche, 2010; Feldman & Orlikowski, 2011; Gherardi, 2009; Orlikowski, 2010; Tsoukas, 2010; Vaara & Whittington, 2012). Second, aware that it is impossible to access all aspects of strategy practice and that the researcher's view is always partial and selective, we argue that it is necessary to design

a multi-method research so that we can see (and analyze) the strategizing from multiple points of view (Feldman & Orlikowski, 2011; Fook, 2002). Here we engage in the debate on how to choose appropriate method approaches to study empirically what social practices of strategizing are about (Seidl & Whittington, 2014; Vaara & Whittington, 2012). Specifically, we seek to describe how ethnography, narratives of practice, and grounded theory can be used together to help researchers to deal with the challenge of going beyond in vivo descriptions to link micro-level practices with more macro-level outcomes. It is important to note that the framework could be used flexibly as it is not a cookbook but provides guidance tools that may be customized according to the problem and the context of the research (Gehman et al., 2018).

TO STUDY STRATEGIZING AS A PRACTICE

One of the main contributions of the practice turn (Reckwitz, 2002; Schatzki, Knorr-Cetina, & Savigny, 2001) was its attempts to overcome the micro/macro distinction (Feldman & Orlikowski, 2011; Felix, Mello, & von Borell, 2018; Seidl & Whittington, 2014). It argues that a dynamic practice field should be the starting point for social analysis (Schatzki, 2005). Micro and macro are seen as secondary effects of the practice field (Chia & MacKay, 2007). In this perspective, which is consistent with a becoming ontology as coined by Chia (1995), the phenomena are not fixed but should be explored empirically as being consistently ephemeral. A truly practical approach is particularly powerful when it takes seriously the interaction of the ‘what’ practices are used, ‘who’ is engaged in the practices, and ‘how’ the practices are carried out (Jarzabkowski, Kaplan, Seidl, & Whittington, 2016, p. 248).

SAP perspective has focused on microactivities, giving little attention to the broader issues related to the institutional level (Seidl & Whittington, 2014; Suddaby, Seidl, & Lê, 2013) and to the nature of strategic work (Hydly, 2015). In this sense, there is a need to understand the macro-institutional nature of the strategizing and how the activities of this practice are embedded in a broader social context (Jarzabkowski et al., 2016; Vaara & Whittington, 2012), which can generate significant institutional transformations (Johnson, Smith, & Colding, 2010). Fascination with the detailed understanding of local praxis can produce what has been called ‘micro-isolationism,’ whereby a local empirical instance is interpreted wholly in terms of what is evidently present, cut off from the larger phenomena that make it possible (Feldman & Orlikowski, 2011; Jarzabkowski et al., 2016; Kouamé & Langley, 2018; Seidl & Whittington, 2014; Vaara & Whittington, 2012).

Traditionally, SAP research has employed methods informed by ethnography (e.g., Iszatt-White, 2010; Samra-Fredericks, 2003), grounded theory (e.g., Hendry et al., 2010), and phenomenology joint narratives research (e.g., Küpers, Mantere, & Statler, 2013). Each of these approaches enables in depth exploration of certain strategizing dimensions (praxis, practices, or practitioners) and certain levels of analysis (micro, meso, or macro). Nevertheless, when applied alone, they have some limitation in understanding strategy as practice. Despite the promising results of the practice-based theories in SAP literature, “it is time to do research with methodological frames design from a practice perspective” (Jarzabkowski et al., 2007 p. 22). We argue that the method design discussed in this paper is long-range because it allows apprehending different levels of analysis and to deal with praxis-practices-practitioners dimensions that are central to SAP studies (see Whittington, 2006; Wolf & Floyd, 2017). Figure 1 illustrates the method developed in the present study.

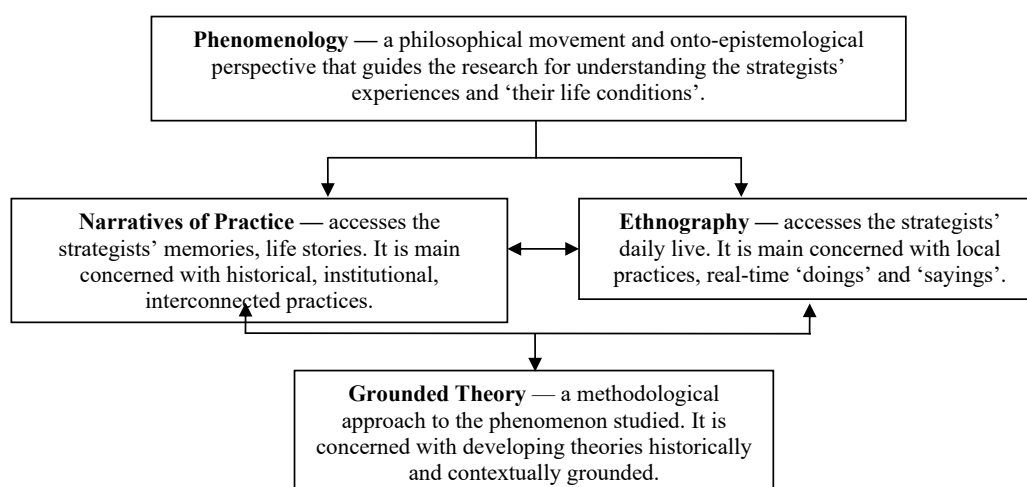


Figure 1. Method design.

Source: prepared by the authors.

At the top of the Figure 1, there is the interpretative (or existential) Heideggerian phenomenology. It constitutes the onto-epistemological foundation (Gill, 2014; Orlikowski, 2010; Quay, 2016; Tsoukas, 2010) that should guide the researchers' posture when taking the strategy as practice as its object of research, directing their decisions on what type of data construction and analysis method(s) to use. Instead of orienting themselves by methodological individualism or by societism (Schatzki, 2005), researchers should focus on the dynamic of practice in itself as a starting point for social and strategy-as-practice analysis (Chia, 1995, 2004; Chia & MacKay, 2007; Reckwitz, 2002; Schatzki, 1996, 2002; Seidl & Whittington, 2014; Tsoukas, 2010).

Social co-existence is rooted in a field of practices. On the one hand, actors are not acting in isolation but are drawing upon the regular, socially defined modes of acting that arise from the plural social institutions to which they belong. On the other hand, the social infrastructure (tools, technologies, and discourses) through which micro-actions are constructed has macro, institutionalized properties that enable its transmission within and between contexts (Jarzabkowski et al., 2007; Tsoukas, 2010; Vaara & Whittington, 2012). Connecting "the micro-level more explicitly to the larger picture can now offer a variety of theoretical and practical pay-offs" (Seidl & Whittington, 2014, p. 1408). For understanding and (re) presenting strategy as practice, we need to see the connection between the here-and-now real-time set of bodily doings and sayings carried out using a variety of tools and the elsewhere-and-then other practices embedded in a broader social and historical context (Nicolini, 2009a).

The need to perform these two movements, zoom in (here-and-now) and zoom out (elsewhere-and-then), is what inspires our proposal to use ethnography (Atkinson et al., 2001; Cunliffe, 2010, 2015; Nicolini, 2009a; Rasche & Chia, 2009) and the practice narratives (De La Ville & Mounoud, 2010; Fenton & Langley, 2011; Laslett, 1999; Rouleau, 2010) together. Ethnography and practice narratives appear interconnected in the figure in order to highlight their complementarities as data production empirical methods. Despite recognizing that there are differences between these two approaches, we consider that they also have points in common and can be used together to expand the researcher's possibilities of understanding strategy as practice. Both have conceptual roots on Heideggerian existential phenomenology and its onto-epistemological assumptions (Gubrium & Holstein, 1999; Hansen, 2006; Küpers, 2005; Küpers et al., 2013; Vom Lehn & Hitzler, 2015).

Taken together, they will enable researchers to understand both the conditions of the local real time accomplishment of practice and the ways in which practices are associated into broad textures to form the landscape of practitioners organizational (strategic) life (Nicolini, 2009a;

Feldman & Orlikowski, 2011; Kouamé & Langley, 2018). When people tell stories about their own experiences and reflect on the activities they perform in their daily lives, they are influenced by available institutionalized macro-level stories about strategy-making. They tell their stories in ways that reflect or build on expectations created in these macro-stories. When these stories are exchanged with other people, "they engender mutual commitments to which subsequent storytelling becomes entrained, generating an ongoing thrust and direction that embeds elements from multiple levels" (Fenton & Langley, 2011, pp. 1185–1186).

However, it is not a matter of minimizing the importance of close attention to micro-level strategizing praxis. Hence the importance of incorporating the grounded theory that deals with building new substantive theories (transferable to other contexts, not necessarily generalizable) from the actions, behaviors, and words of those who actually live in a specific research context (Bryant, 2017; Charmaz, 2006; Goulding, 2002; Strauss & Corbin, 1998). Grounded theory, at the bottom of the figure, is considered here as a way of conducting the research work that: (a) guides the 'trips to the field' (for the empirical work of data production) and the 'home visits' (for the analytical effort to understand the empirical data) and; (b) supports the researcher helping to keep the focus on the construction of theoretical contributions beyond the detailed description of the particular case studied (Hendry et al., 2010; Strauss & Corbin, 1998). What is pointed out is the need to conduct data production and analysis including iterative back and forth loops between data and theory involving categorization and coding of data according to both emerging activity patterns and preexisting theories (Bryant, 2017; Charmaz, 2006; Goulding, 2002). Doing so helps researchers to deal, at the same time, with the challenge of retain sensitivity to local conditions and actors' responses to them and to the social embeddedness and interconnections across levels of analysis (Tsoukas, 2010).

Therefore, we emphasize that a single method is not able to deal with the dynamic, complex, and multiple nature of practices. We need to develop multi-method approaches for appreciating and representing the making of strategy. We should learn to ask to "what extent different methods are sensitive to the nature of practice and what aspects of the practice they are particularly good at articulating and representing" (Nicolini, 2009b, p. 210). The idea to propose a method for strategy as practice scholars is based on the need to offer a "theory-method package 'fit,' in which the methodological tools and their particular configuration are suited to the research question and theoretical aims of the project" (Gehman et al., 2018, p. 297). The design of the presented method increases the accuracy, depth, and richness of the research. Next, we will discuss in detail each approach that constitutes the method.

PHENOMENOLOGY AND PRACTICAL EXPERIENCE

There is no such thing as ‘the one’ phenomenology (Cope, 2005; Gill, 2014; Küpers, 2009; Sandberg & Dall’Alba, 2009). The term ‘phenomenology’ involves diverse lines of thought (Gill, 2014) that could have been more adequately brought together in a phenomenological movement (Cope, 2005). Within this movement, at least two main approaches can be highlighted: a descriptive (or transcendental) phenomenology, which has as reference the works of Edmund Husserl (1859-1938), and an interpretative (or existential) phenomenology, inspired mainly by the contributions of Martin Heidegger (1889-1976). Many of the practice-based approaches that have been used as a reference for the recent developments in strategy as practice research are inspired by this kind of lifeworld perspective (Miettinen, Samra-Fredericks, & Yanow, 2009; Orlikowski, 2010; Reckwitz, 2002; Sandberg & Dall’Alba, 2009; Tsoukas, 2010). Therefore, we will focus on this approach to develop our method.

The ‘interpretative’ (or existential) approach, in a Heideggerian tradition, finds its entry point in the phenomenological movement based on the criticisms it weaves about the foundationalist character of descriptive phenomenology (Gill, 2014; Quay, 2016; Sandberg & Dall’Alba, 2009; Vom Lehn & Hitzler, 2015). Rather than seeking to identify pure descriptive categories of the real, the interpretive phenomenologist directs his efforts to describe the meanings constructed by individual being-in-the-world and to understand how these meanings influence the choices that these ‘beings’ make. More than the study of pure essences, interpretative phenomenology seeks to put essences back into existence - instead of revealing the pure subject, it seeks the incarnated subject, situated in the lifeworld (Conklin, 2012; Gill, 2014; Sandberg & Dall’Alba, 2009; Sanders, 1982; Van Manen, 1984; Vom Lehn & Hitzler, 2015).

Heidegger’s existential phenomenology shows that the most basic feature of the relation between person and world is not consciousness directed to others and things in the world, as Husserl claimed, but ‘being-in-the-world’ (Gill, 2014; Heidegger, 1962; Küpers, 2009; Sandberg & Dall’Alba, 2009). It stipulates that we are inevitably intertwined with our world through constant engagement in specific ways of being-in-the-world, such as cooking, driving, teaching, strategizing (Sandberg & Dall’Alba, 2009; Schatzki, 2002, 2005). It is our ways of being-in-the-world that enable us to make sense of ourselves, others, and things we use, deal with, and encounter in our everyday activities (Gill, 2014; Sandberg & Dall’Alba, 2009). From a lifeworld perspective, practices are conceptualized as specific worlds

in which members dwell, made up of an array of activities, people, knowledge, equipment, concerns, and so on (Cope, 2005; Reckwitz, 2002; Schatzki, 2002, 2005; Tsoukas, 2010).

As argued by Tsoukas (2010), an onto-epistemological framework inspired by Heideggerian phenomenology enables us to analytically relate strategy making (non-deliberate mode) and strategy practices (deliberate mode) in its various manifestations. It has the potential to help us to take a step forward and overcome the individualist bias that have rightly identified in dominant conceptions of strategy as practice (Chia & Holt, 2006; Chia & MacKay, 2007; Sandberg & Dall’Alba, 2009). This is because, according to Heidegger (1962), this being-in-the-world happens according to two forms of engagement — dwelling and building mode.

The ‘building mode’ is characterized by the assumptions that individuals are discretely bounded entities and that there is an initial pre-cognitive separation between the actor and the world. Cognition and mental representation of the world necessarily precede any meaningful action and strategic action is explained through recourse to the intention of actors. The strategy actor has first a need to construct mental representations and models of the world prior to any practical engagement with it (Ingold, 2000). Strategizing is thus construed as the act of planning purposeful interventions into the flow of reality to affect a desired outcome (Chia & Rasche, 2010; Tsoukas, 2010). It is in this ‘building mode’ that thematic representation, deliberate intention and action take over from everyday coping practices. It is in these moments that we become aware of the symbols and representations that help us retrospectively understand what is happening with the organization (strengths, weaknesses, threats, opportunities), that deliberate and intentional actions come on the scene, and that the various formal activities and strategic episodes (away days, meetings, strategic planning seminars) (Hendry & Seidl, 2003) take place (Chia & Holt, 2006; Chia & Rasche, 2010). It occurs as “a distinctive moment of being-in-the-world that comes about when people step back from immediate practical tasks and reflect on an entity in a detached manner, seeking to identify its properties ‘in abstracto’” (Tsoukas, 2010, p. 59).

In a different way, the ‘dwelling mode’ does not assume that the identities and characteristics of persons pre-exist social interactions and social practices. People are assumed to be intimately immersed and inextricably intertwined with their surroundings in all their complex interrelatedness. Social practices are given primacy over individual agency and intention. Thus, strategic actions are explained not on the basis of individual intentions but as the product of particular, historically situated practices (Chia &

Rasche, 2010; Tsoukas, 2010). The agent acts ‘purposively’ by drawing on what is directly available from within the specific set of circumstances in which s/he finds her/himself in, to deal effectively with the predicaments and obstacles s/he immediately faces (Miettinen et al., 2009). The strategy emerges not as a result of a previous, conscious mental representation, but as a consequence, a stabilized secondary result of a practical intelligibility incorporated by the practitioner who dwell with the circumstances to which s/he is exposed in a way that can be recognized retrospectively as being strategically consistent (Bouty, Gomez, & Chia, 2019; Chia & Holt, 2006; Chia & MacKay, 2007; Chia & Rasche, 2010; Tsoukas, 2010).

This Heideggerian phenomenological approach “has important implications for how we view strategy and, crucially, it helps furnish strategy as practice with an onto-epistemology that makes room for different types of action and intentionality” (Tsoukas, 2010, p. 53). This leads us to consider that strategy as practice consists of both: visible and manifest purposeful activities and more mundane everyday practical coping actions. Regner’s (2003) study, for example, shows that we do not have to think of ‘building and dwelling’ “as mutually exclusive alternatives, but rather like to encourage scholars to use both while making sense of research settings” (Chia & Rasche, 2010, p. 43). As pointed by Tsoukas (2010), while it is true that the infusion of practitioners with an internalized style of engagement, grounded in culturally transmitted social practices, affords action consistency over time, and thus apparent purposefulness (Bouty et al., 2019; Chia & Holt, 2006), it is also true that goal-directed actions and reflexive monitoring are not only possible but systemically built into formal organizations (Hendry & Seidl, 2003; Jarzabkowski & Seidl, 2008).

THE NARRATIVES OF PRACTICE

There has been a growing interest on narratives of personal experiences to clarify different organizational research questions, but their full potential has not been explored (Vaara, Sonenshein, & Boje, 2016). The large number of published papers involving this type of study is a good indicator of its popularity (e.g., Boje, 2001; Czarniawska, 1998; Gabriel, 2000; Küpers et al., 2013; Holstein, Starkey, & Wright, 2018; Rhodes & Brown, 2005; Riessman, 1993). In the field of organizational studies, narratives of personal experiences have also gained popularity in the linguistic turn (Alvesson & Kärreman, 2000; Murphy & O’Brien, 2006) and it is an interesting means through which researchers can understand actors’ experiences in organizations (Humphries & Smith, 2014). Through narratives, people share and disseminate their perceptions on their work and the processes in which they

engage (Patriotta, 2003). They are storytellers and their stories are valuable empirical data (Rhodes & Brown, 2005).

Organizational narratives can be defined as “temporal, discursive constructions that provide a means for individual, social and organizational sensemaking and sensegiving” (Vaara, Sonenshein, & Boje, 2016, p. 3). Therefore, studies employing the narrative approach focus on stories. These stories aim to return to the individual moment to describe when and how the individual experienced certain phenomena (Adorisio, 2014). It has the potential to reveal different perspectives and feelings of organizational members (Boje, Rosile, Saylor, & Saylor, 2015). Narratives should be a privileged method for capturing the ordinary and daily character of organizing (Patriotta, 2003). It offers a methodological way and a different form of knowledge for researchers to engage with everyday organizational life (Rhodes & Brown, 2005).

Strategists are assumed to be able to supply varied life experiences to improve understanding on how strategizing develops over time (Rouleau, 2006), activating the past through narratives (Adorisio, 2014). Strategy is constituted by “working and re-working through narrative of past, present, and future” (Holstein et al., 2018, p. 78). When narrating their strategizing stories practitioners: (a) reveal their work life conditions, (b) make explicit their doings and saying, (c) describe the characters with whom they interacted and the activities in which they participated, and (d) talk about the tools/artifacts that they used while they strategized (Denis, Langley, & Rouleau, 2007).

Contrary to how this method may appear, it is not necessarily limited to the micro-level of analysis (see Boje, Haley, & Saylor, 2016). The narratives of practice, as Bertaux (1980) shows, incorporate diverse contextual elements. Upon recounting their stories, individuals refer to details that cut across different levels of analysis (Vaara et al., 2016). The life stories share a social dimension that enables us to analyze not only an individual but also a social object that acts as a fragment of a socio-historic reality (Laslett, 1999). Therefore, we should augment the narrative interpretation by employing a research design that allows intimate analysis of the narrative’s context (Hansen, 2006).

In this sense, undertaking an ethnographic effort to add insight to the text and language would be interesting (see Kalou & Sadler-Smith, 2015). If speech is a fundamental element of culture and practice, then the discursive elements are not the only ingredients utilized to build meaning and give form to actions (Barry, Carroll, & Hansen, 2006; Schatzki, 2002). There is always a context in which an individual’s understandings are ordered and put into practice (Hansen, 2006; Schatzki, 2002). Soin and Scheytt (2006), for example, argued that narratives should not be taken as single sources of empirical data. Rather, they should

be analyzed together with ethnographic methods. Gubrium and Holstein (1999) stated that ethnography would allow researchers to perceive the hidden details of living that do not appear in narratives.

ETHNOGRAPHY AND PRACTICE

Overall, ethnography is the description of a culture. It enables the understanding of others and their daily social lives (see Atkinson et al., 2001; Bernard & Gravlee, 2015). To accomplish these goals, the researcher lives intensely and for long periods in the environment of the study population (Cunliffe, 2010; Van Manen, 1984). This increases the validity of the strategy as practice studies as these practices “reflect the reality of the life experiences of participants more accurately than do contrived settings” (LeCompte & Goetz, 1982, p. 43). In this way, the researcher understands the mechanisms of social processes, their structure and functioning, and how such processes, structure, and actors are involved (Rosen, 1991).

The ethnographic encounter gives the researcher a unique opportunity to see the reality of a group of people (Kalou & Sadler-Smith, 2015) in their natural setting (Goulding, 2005). In addition to studying the people, the researcher learns from them and describes their realities in the respondents’ own terms (Cunliffe & Karunanayake, 2013; Spradley, 1979). The researcher must always have an additional understanding and knowledge of the reality of the study population, rather than only academically predefined categories (Cunliffe, 2010). The ethnographic description must be undertaken from experiences within the analyzed context because the events that occur can only be understood in the context of their production (Hammersley, 1992).

Rasche and Chia (2009) asserted that though some researches have employed the ethnographic perspective (Jarzabkowski & Wilson, 2002; Samra-Fredericks, 2003), few have effectively used participant observation as a fundamental element for the study of SAP. Using the ethnographic method, the researcher would live with strategists, learn their language, and participate in their practices and rituals (Vesa & Vaara, 2014). Researchers would observe their daily situations and activities in different scenarios and at different levels. The researchers could use systemic observation to understanding strategizing’s non-formalized aspects: “the everyday problem-solving, the opportunistic making-do’s and the ingenuity and guile displayed at every level in the organization” (Rasche & Chia, 2009, p. 726).

Although ethnographers have made considerable efforts to produce detailed descriptions, little has been performed to develop concepts to support a robust

theoretical structure (Fine, 2003; Lofland, 1995) and many ethnographic studies have simply led to an endless number of dispersed data islands (Prus, 1987). In general, the task of developing theories is either ignored or treated as a ‘black box’ (Snow, Morrill, & Anderson, 2003). The ‘black box’ is related to an ‘intermediary moment’ between what Van Maanen (1988) called the first (data collection) and the second (production of ethnographic text) moments of ethnographic research. That ‘intermediate moment’ in which data analysis occurs is normally left aside.

Copious material has been written about different aspects related to the first and second moments. Authors have detailed methods to negotiate access to the field (Cunliffe & Alcadipani, 2016), to establish and maintain relations with the study population (Rosen, 1991), to write a diary (Emerson, Fretz, & Shaw, 1995), and to decide when to leave the field (Iversen, 2009). However, little has been published regarding data analysis and about the methods by which the researcher transforms their raw data into the final narrative in an intermediate moment (Snow et al., 2003). So, ethnography may be combined with other research methods (Watson, 2011), such as grounded theory, to improve its analytical dimension (Charmaz & Mitchell, 2001).

THE CHOICE OF A GROUNDED THEORY

We advocate for finding a research approach that transcends simple description of strategist activities. Grounded theory has the necessary tools to achieve this goal insofar it is theory building (Goulding, 2017) and explanations emerge from the field (Walsh et al., 2015). As stressed by Charmaz and Mitchell (2001), ethnographic studies usually have the problem of presenting lists of unintegrated categories. Using grounded theory can give researchers a more complete view of the phenomena and guide researcher toward theoretical interpretation, assisting the ethnographer in structuring and organizing the data (Charmaz & Mitchell, 2001). Instead of simply focus on the thick descriptions, grounded theory involves building strong concepts and categories (Bryant, 2017) that should not only offer descriptions but also explanations (Corbin & Strauss, 1990).

In this approach, theory must be directly related to the participants’ lives, experiences, and practices (Corley, 2015; Mills, Bonner, & Francis, 2006). It is necessary to maintain a clear and direct connection with the data, but the theory should not be limited to a simple description of stories (Goulding, 1998). Though grounded theory has supporters as a result of its assumptions and phenomenological techniques, its focus is not on individuals’ subjective experience *per se*. Grounded theorists attempt to reach a

slightly higher level of abstraction, higher than the data itself (Suddaby, 2006).

Constructing a grounded theory involves continuity between theoretical and empirical levels (Bryant, 2017; Corbin & Strauss, 1990; Goulding, 2005). The theory is developed during the research process and emerges as a product of the continual interaction between analysis and data collection (Goulding, 2002). As such, data and theories are produced, similar to interpretive grounded theory, initially suggested by Strauss and Corbin (1998), and constructive grounded theory, developed by Charmaz (2006). Mintzberg (1979) has already suggested that “there is no one-to-one correspondence between data and theory.” (Mintzberg 1979, p. 582). Data does not generate theory. Only researchers do so. As Goulding has stated, “researcher reflexivity should be an integral part of the process, as should work on the social construction of the world under the study” (Goulding, 2017, p. 64).

One of the main strengths of grounded theory is that its flexible set of analytical strategies can be used as the researcher wishes (Charmaz, 2000; Corley, 2015). The grounded theory guidelines should be used as “a general way of generating theory” (Atkinson et al., 2001, p. 150) grounded in data (Goulding, 2017). Adopting a grounded theory approach aids in sorting through the richness of the data obtained from narratives and ethnography in a systematic and integrated way. Thus, researchers can extend the analytical frontiers and theoretical sophistication of their fieldwork. Grounded theory approach allows researchers better access to the context and the study population (Corbin & Strauss, 1990) such that researchers can better understand experiences (Bryant, 2017).

DISCUSSION AND METHODOLOGICAL IMPLICATIONS

A broad implication of the proposed method is that its design helps to capture life conditions and understand human activities in the theory of practice, going beyond a specific focus on aspects of micro- or macro-strategizing. So, this approach implies that a relational philosophy should be adopted, directing researchers’ attention more to the process — the organizing — and less to the thing — the organization (Shepherd & Suddaby, 2017). That is, relationships should occupy a central position in analyses (Chia, 2003). In this sense, by starting from phenomenology approach it is possible to study actors in their own environment (Van Manen, 1984), analyzing the context of their lively experiences (Vom Lehn & Hitzler, 2015).

The proposed method has phenomenology as basic assumption because from it we can apprehend the

lived experiences of individuals in their daily activities and “for organization researchers, much of the potential scope and value of phenomenology remains unrealized” (Gill, 2014, p. 119). Studying strategizing through phenomenological approach enables researches to understand how knowledge emerges through our engagement with the world (Willems, 2018). SAP research offers an interesting area to apply the phenomenological assumptions combined with narrative. Besides the growth of narrative studies on strategy as practice (Vaara et al., 2016), organizational strategy is increasingly flexible. As Küpers, Mantere, and Statler (2013) argue, to be open to emerging change is one of the main characteristics of phenomenology that recognize narratives as a basic aspect of lifeworld.

An interpretative phenomenology views all human experience as intrinsically narrative, emphasizes the way in which narrative experiences are always embodied in a context that involves an interplay of people, cultures, environments, and objects (Cunliffe, Luhmann, & Boje, 2004; Küpers, 2005). This approach can bring researcher closer to practitioners (Küpers et al., 2013) and enable a better understand of day-to-day strategists. Narrative can be found in the micro-stories told by managers and others as they interact and go about their daily work and in the accounts that people give of their work as strategy practitioners (De La Ville & Mounoud, 2010). This is a method that provides broad and deep data collection: data based on a temporal schema, data embedded in a context, data that can be compared, data that can be gathered from individuals belonging to all hierarchical levels, allowing collection of a wide range of empirical evidence (practices, events, discourses, representations, artifacts, tools, object) (Rouleau, 2010).

Considering that narrative is central to phenomenological approach (Küpers et al., 2013), to employ it would access to the practitioners’ storytelling that gives sense to their organizational life (Rhodes & Brown, 2005) and their identity as strategists (Mantere & Whittington, 2020). Narratives contribute to a better understanding of how strategy-making involves sensemaking and sensegiving (Vaara et al., 2016). So, the proposed method is useful to investigate, for instance, the underlying assumptions of a strategy narrative and how conflict between competing narratives is resolved (see Rhodes & Brown, 2005; Boje et al., 2016; Holstein et al., 2018). Researchers should interview the various actors involved in strategizing to trace their narratives (Czarniawska, 1998). As asserted by Küpers et al. (2013), “from a phenomenological perspective, narratives are a mode of human existence” (Küpers et al., 2013, p. 86) and “the power of stories lies in their capacity to encompass thinking and feeling about issues and thereby to compel people to take certain actions and avoid others” (Küpers et al., 2013, p. 96).

However, despite the importance of the lived experience of the practitioners, a central issue for strategizing research is its attempt to overcome micro/macro dichotomy existing in strategy literature (Chia & MacKay, 2007). Whittington (2011) states that practices approach have been limited to investigate individual activities of actors, while they should embrace both analysis levels (micro and macro), even if one or the other does not appear clearly in a given time (Whittington, 2011). Accordingly, we should go beyond everyday interactions analysis and try to understand how praxis may influence and be influenced by organizational and institutional level practices and explain the role of practitioner in strategizing.

Watson and Watson (2012) highlight that the holistic character of ethnography and its concern about culture can contribute to dealing with the different levels that encompass the social world. If on the one hand, the studies using narratives approach primarily collected stories through interviews in a planned conversation for that aim, on the other hand, observation of in vivo practitioners' interactions enables researchers to evidence the ongoing narratives (Fenton & Langley, 2011) and how they are embedded in praxis-practices-practitioners (Whittington, 2006). Ethnography significantly enhances the immersion of researcher into fieldwork (Eisenhardt, Graebner, & Sonenshein, 2016; Rosen, 1991), enabling the collection of a great amount of data. Thus, it is not necessary for the researcher to maintain distance from the object of the study (Whittington, 2004). Thereby, ethnography seems to be a powerful method to study social/cultural aspects surrounding strategizing and provide depth descriptions of connections between different levels of analysis (see Jarzabkowski, Bednarek, & Cabantous, 2014).

For example, an advantage of using ethnography in SAP studies is its potential to allow researchers to observe informal and natural interactions between practitioners. It facilitates access to the organization's artifacts and documents, as well as helping to observe strategy toolmaking process (see Burkea & Wolf, 2020). This provides insights into the macro-level of the organizational context as these elements are employed to materialize cultural and institutional characteristics of the external environment such as shared norms, values, and meanings. At the same time, the ethnographic method sheds light on the micro-level of strategizing by allowing researchers to investigate the "behind the scenes' work and follow its consequences for the unfolding dynamics of changes to strategy arrangements" (Whittle, Gilchrist, Mueller, & Lenney, 2020, p. 4). The backstage can be accessed by a systematic observation and actors' narratives (see Whittle et al., 2020). Narratives can be used to capture the actors' stories about how they manipulate these strategic artifacts in their organizational

daily lives. Doing so, the researcher would be able to access actors' personal experiences (Adorisio, 2014) of strategizing.

Aiming at study strategy teams under strategy as practice perspective, Paroutis and Pettigrew (2007) employ the case study as method research and collected data through interviews and documents. The authors, however, knew that "an ethnographic approach might have provided more detailed accounts of the actual activities used by strategy teams" (Paroutis & Pettigrew, 2007, p. 107). Cunliffe (2015) argues that ethnography is particularly suited to SAP research because of its focus on the rich description of the micro-practices of organizational life. This is a direct result of the nature of the phenomenon itself: dynamic, complex, involving intense human interaction and the need to get close to the phenomenon (Rasche & Chia, 2009).

At this point, it is worth addressing the validity criterion of ethnography studies. As highlighted by LeCompte and Goetz (1982), researchers should be attentive to observer effects, that is, the presence of the researcher in the fieldwork. According to these authors, researchers can handle this problem by establishing several field relationships (e.g., create rapport with practitioners from different hierarchical levels), searching for independent corroboration of the data collected (e.g., observe and interview actors with different points of view on strategizing), and including their field position in the final report. Doing so, researchers can control possible distortion in the data (LeCompte & Goetz, 1982).

Although ethnography is a strong method to understand ongoing practices and their contexts, it has some limitations that could be overcome by some grounded theory assumptions. One of these limitations is its inability to theoretical development. According to Snow, Morrill, and Anderson (2003), it is important to consider some pathways to theoretical development, like dealing more systematically with data analysis and emerging categories. The grounded theory has potential to contribute to the ethnography, completing it 'intermediary moment' in which data analysis occurs. So, the problem of rigid separation of data collection and analysis would be solved by comparing data with data (and with emerging categories) from the beginning (Alammar, Intezari, Cardow, & Pauleen, 2019), not after the data gathering is finished, and demonstrating concepts and categories relations (Charmaz & Mitchell, 2001). A systematic approach is needed to link field data to building theories (Bryant, 2017) and challenge assumptions underlying existing theories (Alvesson & Sandberg, 2011). All these characteristics of grounded theory can formalize and improve the narrow theoretical aspect of ethnography (Pettigrew, 2000).

The combination of ethnography and grounded theory should follow in a similar way Pettigrew's (2000) indication: researcher uses ethnography methods to

collect data and analyze the fieldwork materials according to the principles of the grounded theory, producing thick description and theoretical account of strategizing. We can add to this indication the use of theoretical sampling (Glaser & Strauss, 2006) as a strategy to enhance the validity of the study, assuring that adequate informants and interviewees are being chosen in order to represent the analyzed population (LeCompte & Goetz, 1982). Thereby, it is possible to describe in detail praxis-practices-practitioners through narratives and understand the multiple levels (individual, organizational, and societal) in which strategizing occurs. This combination allows building strong theories with “well-defined concepts, relationships between constructs, and underlying logical arguments that support these relationships” (Eisenhardt et al., 2016, p. 1120).

FUTURE RESEARCH DIRECTIONS

The proposed method is primarily inductive in its approach, so it is “particularly appropriate in new or understudied empirical contexts where there is relatively little prior work” (Bansal, Smith, & Vaara 2018, p. 1190), enabling SAP scholars to offer new theoretical directions. This is especially relevant in contexts where strategists are facing wicked problems in their organizational activities (Burkea & Wolf, 2020). In this sense, more specifically, the method may be useful for studying two underexplored topics in the SAP literature: (a) strategic changing in pluralistic context/organizations (Denis et al., 2007; Jarzabkowski & Fenton, 2006; Sorsa & Vaara, 2020) and (b) open strategy (Hautz, Seidl, & Whittington, 2017; Mantere & Whittington, 2020; Whittington, Caillaet, & Yakis-Douglas, 2011).

Much strategy theory is inadequate to study strategizing in pluralistic contexts (Jarzabkowski & Fenton, 2006) and social practice theoretical frames can deal with that particularity (Denis et al., 2007). Pluralistic contexts “are those that are shaped by the divergent goals and interests of different groups inside and outside the organization” (Jarzabkowski & Fenton, 2006, p. 631). Although Denis et al., (2007) present some theoretical frames to study strategizing in pluralistic contexts, they do not make clear and do not detail statements about methodological issues. So, our proposed method contributes to fill this gap. As we discussed earlier, our proposed method enables researcher to apprehend multiple levels of analysis, making possible for the researcher to understand the divergent goals, in a way that inside and outside interests are identify by storytelling of practitioners, observed in vivo praxis and the relations between actors, so connecting with societal practices of a specific context.

By investigating actors’ narratives of a Nordic city organization, Sorsa and Vaara (2020) found out four rhetorical practices used to promote strategists’ own interest and values during organizational strategic changes. The study link field data to theory (Bryant, 2017), providing an empirical grounded representation of how rhetorical strategy works. However, as a limitation the authors pointed out that Nordic cultural context may have influenced the findings. Without consider the broader context such as local institutions, sector practices, and public discourses which are also relevant for strategy as practice (Hautz et al., 2017; Suddaby et al., 2013), their analysis did not focus on the macro-level. An ethnography approach could fill this gap since it allows researchers to add insights to the text (Kalou & Sadler-Smith, 2015) emerged from interviews and documents as well as highlight the narrative’s context (Hansen, 2006) where stories about strategizing are told and practitioners’ actions are performed. To offer a consistent explanation and theoretical interpretations beyond thick descriptions, researchers should use grounded theory to support the process of structuring and organizing the data (Charmaz & Mitchell, 2001).

Secondly, Whittington, Caillaet and Yakis-Douglas (2011) identify that strategy has become more ‘open.’ The concept of open strategy is characterized by “an openness in terms of inclusiveness, in other words the range of people involved in making strategy; and an openness in terms of transparency, both in the strategy formulation stage and, more commonly, in the communication of strategies” (Whittington, et al., 2011, p. 532). The authors highlight four forces that foster openness in strategy work (societal, organizational, cultural, and technological), which will become more mundane and spread throughout the organization. Thus, openness is both macro- and micro-phenomena once strategizing is seen as a local set of activities that have widely repercussion in society and are influenced by new information technology, the rise of knowledge work, and collaborative economy (Hautz et al., 2017).

The proposed method could be used to investigate how potential new ‘practices’ shape the daily activities (*praxis*) of ‘practitioners’ while these actors are strategizing in an open and transparent organization. This movement requires analyzing the practitioners’ narratives and at the same time observing their (inter)actions through an ethnographic-based study to describe strategic aspects influenced by cultural and institutional dimensions. To overcome the risk of being just a descriptive research, losing the opportunity to theorize about a new phenomenon, grounded theory offers the appropriate tools to move from concrete data to the conceptual level (Alammar et al., 2019), which provides an explanation of the characteristics and implications of the open strategy for strategizing. Hautz, Seidl, and Whittington (2017) claim that “Open

Strategy can thus contribute to the melding of micro- and macro-approaches in Strategy-as-Practice research” because it allows to capture the broader demands of strategy practice and understand local organizational problems (Hautz et al., 2017, p. 299).

Finally, we would like to advise that the proposed method is not a rigid path to do qualitative research on strategy as practice, but it should be adapted according to the main focus of the study. As highlighted by Gehman et al. (2018), “every qualitative theory-method package, while potentially providing some degree of template or exemplar, nonetheless needs to be customized for a particular research context” (Gehman et al., 2018, p. 297) since researchers have to be sensitive to the interplay between theory and method (Van Maanen, Sørensen, & Mitchell, 2007).

CONCLUSION

The aim of this paper was to discuss potential methods to guide empirical studies of strategy as practice (SAP). Drawing on phenomenology, narratives, grounded theory, and ethnography, the method design is an endeavor to combine multiple qualitative research approaches to provide a starting point for scholars interested in understanding the complex world of strategizing. The method presented in this paper offers two main implications for the literature on strategizing. First, the research method helps avoiding

the dichotomy between macro- and micro-levels of analysis in the study of strategy as practice. Second, we also offer a methodological lens that allows researchers to integrate the praxis, practice, and practitioner dimensions, which is something that SAP scholars have been pointing out as a challenge to be overcome.

However, applying our method to guide empirical studies of SAP is not without limitations. Due to its complexity and to a demand for a relatively large amount of data that needs to be collected in the research field, this approach requires a long period of data collection. As many researchers have short deadlines for their projects, time is an aspect that needs to be evaluated before our method can be put into practice. Also, the researcher needs to have a broad access to the research field of interest. As access usually requires time, achieving both simultaneously can be a hard task in some situations.

The research approach presented in this study is not free from challenges. First, it is necessary to carefully construct a research plan, so that both limitations that were indicated in the last paragraph can be overcome. Second, it is also important that the researcher can be able to create a satisfactory connection between both micro- and macro-levels of analysis, without underemphasizing one of them. This is a hard challenge to overcome, as in some cases researchers can feel ‘seduced’ by the stories that are told by the subjects in the micro-level or by the social structures under which such stories take place.

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