

**DOCTORAL THESIS**

# Strategy Formation as Performative Praxis in the Context of Organisational Identity Attainment

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TALLINN UNIVERSITY OF TECHNOLOGY  
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**Declaration:**

Hereby I declare that this doctoral thesis, my original investigation and achievement, submitted for the doctoral degree at Tallinn University of Technology has not been submitted for doctoral or equivalent academic degree.

Pavel Prokushenkov

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TALLINNA TEHNIKAÜLIKOO  
DOKTORITÖÖ  
75/2025

**Strateegia kujundamine tegevusliku  
praktikana organisatsioonilise identiteedi  
saavutamise kontekstis**

PAVEL PROKUSHENKOV





# Contents

List of Publications .....	6
Author's Contribution to the Publications .....	7
Glossary .....	8
Introduction .....	9
1. Theoretical Background .....	14
1.1. Strategy .....	14
1.2. Organisational Identity .....	15
1.3. Theoretical Framework .....	17
1.3.1. Strategic Intentions Guided by Individual Values .....	17
1.3.2 Strategy Formation as Narrative-Driven Performative Praxis .....	18
1.3.3 Organisational Identity Attainment Through Performative Strategising .....	19
2. Methodology .....	21
2.1. Research Design .....	21
2.2. Data Collection .....	21
2.3. Analysis Techniques .....	23
3. Results .....	25
4. Discussion .....	28
4.1. Value-Based Strategy Formation .....	28
4.2. Strategic Decision Making Within Discursive Formations .....	30
4.3. Features of Organisational Identity Attainment .....	32
5. Conclusion .....	35
References .....	37
Acknowledgements .....	49
Abstract .....	50
Lühikokkuvõte .....	51
Appendix .....	53
Curriculum vitae .....	123
Elulookirjeldus .....	124

## List of Publications

The list of author's publications, on the basis of which the thesis has been prepared:

- I. **Prokushenkov, P., & Wahl, M. F.** (2023) Strategic intentions guided by individual values: evidence from business owners. *International Journal of Applied Decision Sciences*, Vol.16, No.1, pp. 67-86.
- II. **Prokushenkov, P.** (2023) Strategy formation as narrative-driven performative praxis. *International Journal of Management and Decision Making*, Vol. 22, No. 3, pp. 310-333.
- III. **Prokushenkov, P.** (2024) "We are Brave Electronic Engineers!": Organizational Identity Attainment Through Performative Strategizing. *TalTech Journal of European Studies*, Vol. 14, No. 2 (40), pp. 194-213.

## **Author's Contribution to the Publications**

Contribution to the papers in this thesis are:

Paper One. The author of the thesis is the first author of the article and was responsible for developing the conceptual, theoretical, and methodological framework of the study, analysing the data and presenting the results, conclusions, and contributions in collaboration with a co-author who was responsible for developing the conceptual framework of the study and was involved in data collection.

Paper Two. The author of the thesis is the sole author of the article and was responsible for developing the theoretical and methodological framework of the study, collecting and analysing the data and presenting the results, conclusions, and contributions.

Paper Three. The author of the thesis is the sole author of the article and was responsible for developing the theoretical and methodological framework of the study, collecting and analysing the data and presenting the results, conclusions, and contributions.



## Glossary

Term	Explanation
Basic Human Values	Universal guiding principles (Schwartz theory)
Constructivist Grounded Theory	Qualitative method where theory is inductively built from data through co-construction with participants
Critical Discourse Analysis (CDA)	Examines how language constitutes reality, revealing what is embedded beneath surface meaning
Discursive Practices	Recurrent uses of language
Image Theory	Decision-making model linking values, goals, and future trajectories through three cognitive images
Micro-activities	Small verbal and practical moves
Narratives	Coherent accounts connecting past, present, and future
Performativity	Concept of “doing things with words”
Performative Strategising	Enacting strategy through linguistic practices
Polyphony of Voices	Dynamic mix of narratives in strategising
Strategic Discursive Formations	Short-term mental structures shaped by prescribed and intuitive ways of strategising
Strategic Intentions	Commitments guiding strategic action
Strategising	Situated strategic activities
Strategists	Individuals engaged in strategising
Strategy Formation	Ongoing mix of deliberate and emergent strategising

## Introduction

This thesis addresses strategy and organisational identity as interconnected phenomena in organisational life. Despite the diversity of perspectives, strategy is seen as a path towards long-term success (Mintzberg et al., 1998a; Carter et al., 2010), while organisational identity refers to the collectively shared sense of “who we are as an organisation” (Albert & Whetten, 1985). Strategy and organisational identity are closely interwoven, though not in consistently linear ways. The dominant perspective in the literature frames their interplay as a matter of fit: whether strategy aligns with or deviates from organisational identity, emphasising consistency or tension (Wenzel et al., 2020; Ravasi, Tripsas & Langley, 2020; Alguera Kleine, Ge & De Massis, 2024). This view narrows the complex interaction between the two phenomena. In contrast, the alternative approach suggests that the relationship between strategy and organisational identity may be more fluid and even ambiguous (Rindova, Dalpiaz & Ravasi, 2011; Anthony & Tripsas, 2016). One reason may be that the two are shaped by opposite temporal orientations: organisational identity draws on past experience, while strategy imagines what could come next (Schultz & Hernes, 2020; Rindova & Martins, 2022). These divergent temporalities complicate their interaction and challenge the adequacy of alignment and fit as analytical lenses. Rather than viewing strategy and organisational identity as stable entities to be measured against each other, it may be more productive to see them as evolving through organisational practices. This includes procedures, narratives, and interpretive frameworks through which organisations enact both strategy and identity (Whittle, Vaara & Maitlis, 2023). From this perspective, the strategy-identity relationship becomes a matter of ongoing construction - formed by evolving meanings, shifting discourse, and future-oriented sensemaking (Rindova & Martins, 2023; Wenzel, Cabantous & Koch, 2025).

Recent research shows that strategising - understood as situated, ongoing activities enacting strategy in real organisational settings (Jarzabkowski, Balogun & Seidl, 2007) - both draws upon and redefines organisational identity through language, decision-making, and the use of symbols in organisational life (Hatch et al., 2015; Cloutier & Ravasi, 2020). Although many studies have approached the relationship between strategy and organisational identity from a broad organisational perspective, there is increasing attention to how these connections are shaped by those directly involved in strategising (Whittington, 2006; Kornberger & Clegg, 2011; Mantere, 2013; Langley et al., 2020). This shift in focus calls for a closer look at how organisational identity is constituted not by abstract alignment or inherited notions, but through the situated and evolving practices embedded in strategising. It draws attention to how meanings are worked out in the moment: questioned, negotiated, adapted, revised, and made workable within ongoing action. From this perspective, strategy and organisational identity do not simply interact - they become entangled through the values, narratives, and sensemaking of those enacting strategy. It raises the question of how organisational identity emerges through the interpretive efforts and localised reasoning made visible in strategising. Organisational identity can thus be understood not as a static background for strategic action, but as the very terrain through which strategy takes shape and meaning.

The research problem of this thesis relates to organisational identity attainment through strategising. Organisations form and transform their identities through strategic actions in the context of outer obstacles and internal discussions (Gioia et al., 2013). Analysing how strategy is communicated and understood, Mantere (2013) claims that

strategic language - manifested through the shared narratives and discourses of leaders and employees - plays a crucial role in forming organisational identity. In turn, Sillince (2006) argues that rhetorical strategic practices - which organisations use to communicate their identity to internal and external stakeholders - help organisations project identities that are consistent with their strategic goals, facilitating consistency of intentions and actions. Besides, Oliver and Vough (2019) claim that strategic practices form organisational identity by revealing shared identity demands and aspirations among organisational members, while also attracting outsiders. These practices highlight potential identity gaps and opportunities to enhance organisational distinctiveness. In addition, viewed as part of organisational strategising, experimentation with business models creates opportunities for building new organisational identities to replace lost ones (Bojovic et al., 2020). Taken together, these studies show that strategising not only reflects organisational identity but also plays a central role in constructing it. This perspective grounds the study of organisational identity attainment through strategising.

A widely held view in the literature treats organisational identity as a relatively stable construct (Wry, Lounsbury & Glynn, 2011; He & Brown, 2013; Gioia, Schultz & Corley, 2000). This perspective assumes organisational identity as something that already exists - an entity with stable attributes such as centrality, distinctiveness, and endurance (Albert & Whetten, 1985). This approach largely shapes both theoretical and empirical work. In contrast, the alternative approach to organisational identity revealing "how we are becoming" (Chia, 1996; Glynn, 2000; Scott & Lane, 2000; Sillince & Brown, 2009; Rockwell, 2016) has received less attention, despite viewing organisational identity not as an essence or a thing, but as a flow or a narrative opens new perspectives for research (Schultz et al., 2012; Fachin & Langley, 2024). Extending the argument that organisational identity is attained through strategising, this thesis addresses a persistent concern in strategy research - the conceptual ambiguity surrounding the very meaning of strategy (Carter et al., 2010). Without definitional clarity, organisational identity attainment cannot be fully understood by referring to strategising in general. Therefore, it is more productive to approach organisational identity attainment not through strategising as a broad category, but through specifically defined strategy formation understood as dynamic interplay of deliberate and emergent patterns of action - where judgement, intuition, and learning converge in the shaping of strategic intentions (Mintzberg et al., 1998a). This sharper focus makes it possible to study how strategy contributes to organisational identity in concrete and analytically meaningful ways.

While strategy has traditionally been studied as top-down planning to guide organisational direction (Carter et al., 2010), and organisational identity as a stable set of characteristics (Albert & Whetten, 1985; Gioia, Schultz & Corley, 2000), more recent studies emphasise their dynamic interaction with everyday organisational life (Chia & Holt, 2006; Jarzabkowski, Balogun & Seidl, 2007; Langley et al., 2020). Despite previous research demonstrating how discourse shapes strategic meaning (Mantere, 2013) and how organisational identity is conveyed through strategic actions (Oliver & Vough, 2019), there remains limited understanding of how organisational identity is attained through strategising shaped by salient factors at the individual level. In part, this limitation reflects the dominant focus of earlier studies on macro-level constructs such as organisational alignment, identity coherence, or strategic adaptation (Gioia et al., 2000; Nag, Corley & Gioia, 2007; Tripsas, 2009), leaving less examined how organisational identity is formed through the situated activities of strategists engaged in the flow of everyday strategic work. In addition, although a substantial body of research has examined organisational identity as shaped by negotiation

and interpretation (Glynn, 2000; Scott & Lane, 2000; Sillince & Brown, 2009; Rockwell, 2016), and despite insights into identity work by strategists (Mantere & Whittington, 2021), organisational identity attained through value-based and narrative-driven strategising has received limited attention.

Thus, in terms of the research gap, a detailed study of how strategists draw on their personal values and narratives in strategic decision-making and how these situated acts contribute to the ongoing constitution of organisational identity is needed. The focus here is not on strategy as a formal plan or top-down directive, but on how intentions emerge and are shaped through linguistic, symbolic, and context-specific practices. This approach calls for closer attention to how strategists' values influence their strategic intentions, and how narratives structure, justify, and communicate these intentions within organisational life. To examine these dynamics, the thesis adopts the concept of performativity - not as rhetorical flourish, but as a means through which language and action actively construct both strategy and identity. Originally framed by Austin (1962) as "doing things with words," performativity has since evolved into a broader research agenda that includes material, social, and institutional dimensions (Gond et al., 2016; Allard-Poesi & Cabantous, 2021). Understood as strategy formation through linguistic practices, performative strategising (Cabantous, Gond & Wright, 2018) offers a sound framework for examining how organisational identity takes shape in practice. This thesis adopts performativity as an analytic perspective to study how strategists - through their values and narratives - contribute to organisational identity attainment.

In this context, the initial aim of the study is to uncover what lies behind strategising more specifically, how strategists' personal values influence their strategic intentions, and what roles narratives play in strategy formation. Then, the focus turns to the nature of narrative-driven strategy formation, as a way of analysing how organisational identity and strategising are co-constructed through performative practices.

Based on the above, the following central research question (CRQ) and research questions (RQ) were developed:

CRQ. How do strategists' values and narratives, enacted through performative strategising, reveal organisational identity attainment?

RQ 1. What is the relationship between strategic intentions and strategists' values?

RQ 2. What roles do strategists' narratives play in strategic decision-making?

RQ 3. What characterises performative strategising in organisational contexts?

RQ 4. What are the features of organisational identity attained through performative strategising?

The thesis consists of three articles. Article I provides answers to RQ 1, Article II to RQ 2 and RQ 3, and Article III to RQ 4. The thesis aims to answer the research questions through mixed methods. The relationship between the aim of the study, the research questions, and the publications (Articles I–III) is shown in Figure 1.

The common thread running through the publications that formed the thesis is the author's consistent intention to first understand what is beneath strategising, or more precisely - what strategising is based on and what strategising is driven by. A shared focus on the forces influencing strategising, such as strategists' values and narratives, forms the connection between the first and second publications. Having examined the internal forces of strategising, it became possible for the author to theorise strategising as performative praxis – understood as the daily linguistic activities of strategists - and to draw conclusions about its nature as a polyphony of voices - which shape decision-making through a complex mix of conceptual and

empirical narratives. Based on the understanding of the driving forces of performative strategising, as well as its nature, studied in the first and second publications, the author was able to reveal the features of organisational identity attainment. The findings of the third publication were built upon the findings of the first and second publications.

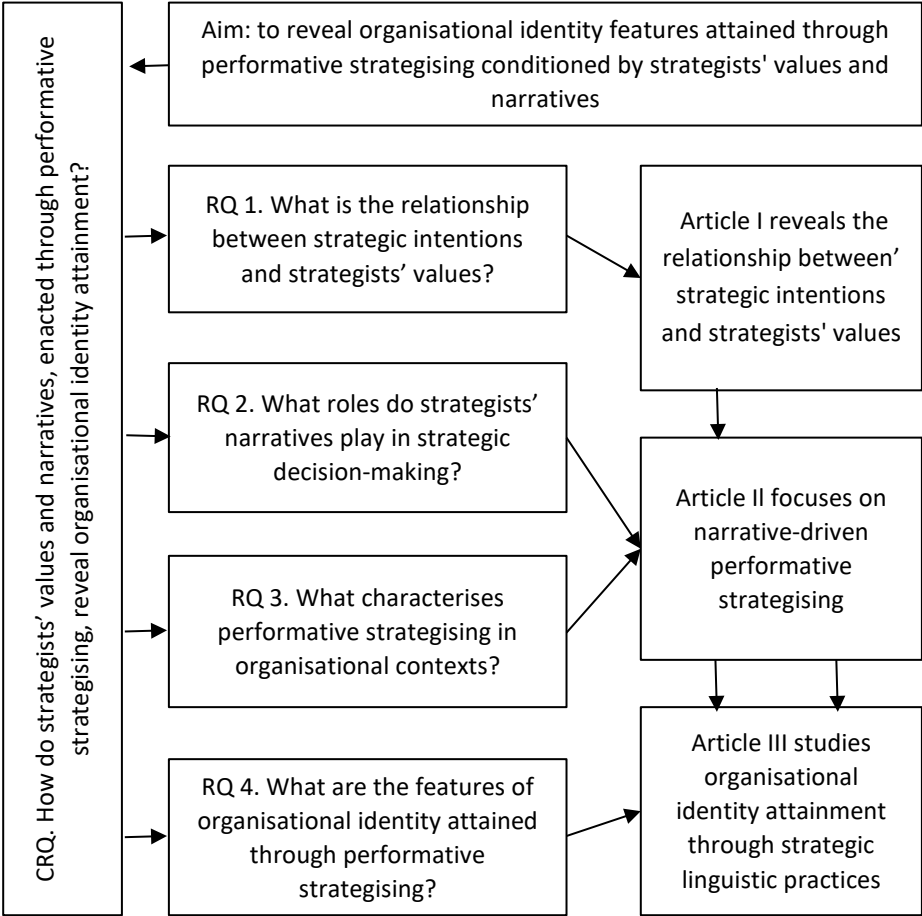


Figure 1. Relationships between the research aim, the research questions, and the publications (Articles I–III). Source: Composed by the author

Article I reveals the relationship between business owners' strategic intentions underlined by attitudes and their basic human values in the form of motivational types. The paper analyses business owners' attitudes towards gaining power opposed to revenue generation, profit withdrawal time horizon, investment in research and development (R&D), adherence to ethical standards, and filling a role in society. This is a cross-sectional survey study. Purposive sampling was conducted to collect data through a questionnaire among 682 business owners from 39 countries.

Article II focuses on performative strategising. The paper analyses narrative-driven praxis being formed by practitioners involved in strategic discursive practices. Revealing interconnections within strategy discourse is crucial as it is the key to

understanding the praxis of strategy formation. This is action research that involved 16 practitioners from 13 countries around the world. Critical discourse analysis is applied to data collected during online coaching sessions.

Article III studies organisational identity attainment in the electronic engineering company from founding to maturity through strategic linguistic practices, understood as performative strategising. Combining action research and grounded theory, the study reveals the features inherent to organisational identity attainment. The author delved deeply into strategy formation as a practitioner, interacting directly with strategists to comprehend organisational identity attainment.

The thesis makes the following **theoretical contributions** that expand upon existing theory, in some respects confirming and in others contradicting generally accepted views. First, it questions the adequacy of normative models in connecting strategists' values and intentions. The results show that strategic intentions do not follow directly from categorised personal values - the relationship is more complex. Second, the thesis introduces a non-normative model of strategy formation driven by individual narratives - that guide strategic decision-making. Third, performative strategising is explained as a polyphony of voices - a dynamic mix of conceptual and empirical narratives. Finally, the thesis deepens understanding of organisational identity attainment by framing it as an outcome of ongoing strategising. The features of organisational identity attainment are revealed at the individual, organisational, and external levels. This thesis does not claim a distinct methodological contribution. The methods applied - including survey, critical discourse analysis, and action research - were selected to support the conceptual aims of the research rather than to innovate methodologically. In terms of **practical contributions**, the theoretical models developed in this thesis can support practitioners in clarifying values-based intentions, identifying the role of narratives framing strategic decision-making, and facilitating reflective dialogue on organisational identity.

The thesis consists of a cover paper and three articles. The cover paper contains four sections. Section One provides an overview of the theoretical basis of the study. Section Two reveals the philosophical paradigm of the thesis, explains the research process, methodological choices, and data collection techniques. The results are presented in Section Three. Section Four provides the theoretical and practical implications and limitations of the study and outlines directions for future research.

# 1. Theoretical Background

## 1.1. Strategy

Strategy is one of the most discussed and widely applied concepts in management research. While there are many definitions, most agree that strategy provides purposeful direction and coherence to guide organisations through uncertain environments (Nag, Hambrick & Chen, 2007). Yet in practice, strategy rarely unfolds as envisioned. Mintzberg and Waters (1985) argue that strategy is both deliberate and emergent: it is meant to follow a plan but can also arise through improvisation. This perspective challenged the traditional image of strategy as a logical blueprint imposed from the top (Ansoff, 1965). Later research showed that strategy may be rooted in everyday routines, language, and local context (Whittington, 2006; Chia & Holt, 2006). The focus therefore shifted: from how strategy should be implemented to how it is actually enacted. Still, the field remains fragmented, with strategy schools offering diverse and often conflicting interpretations (Mintzberg *et al.*, 1998a; Carter *et al.*, 2010). Strategy is no longer seen as a unified body of knowledge, but rather as a patchwork of perspectives. Instead of resolving this fragmentation, this thesis concentrates on how strategy takes shape in practice - and what drives it in the everyday activities of those who strategise.

The strategy-as-practice (SAP) perspective emerged in response to the limitations of abstract, top-down conceptions of strategy. Rather than treating strategy as a fixed plan, SAP draws attention to what individuals actually do as they engage in strategising. Whittington (2006) characterises this reorientation as a move away from disembodied theories of firms towards grounded investigations of situated action - towards the practical activities through which strategy is enacted. Researchers entered the field: observing meetings and joining discussions, tracing how documents were prepared and how tools were used (Rouleau, 2005; Jarzabkowski, Balogun & Seidl, 2007). These studies show that strategy not only emerges in formal boardroom settings. It often takes shape through minor adjustments - a sentence added to a slide, a comment that changes the course of a discussion, or a gesture that shifts tone. SAP highlights that strategy is rarely handed down in finished form (Vaara & Whittington, 2012). It is worked out in the flow of daily work. In practice, thinking and doing are hard to separate. Decisions often arise in the moment, shaped by ongoing events. SAP understands strategy as an emergent engagement with interpreting, adjusting, and responding. Especially in uncertain situations, strategy is not merely declared - it is improvised, provisional, and embedded in context.

At the heart of strategising is decision-making (Wilson, 2015). It is not purely analytical: in everyday practice, strategic decisions are negotiated through situated talks and persuasive efforts (Samra-Fredericks, 2003). Rather than following prescribed rules, action-oriented decision-making is shaped through working drafts, informal feedback, and rapid adjustments. Strategic decisions are often made under pressure - when strategists face a rapidly changing environment. The significance of these decisions may not be evident at the time. Only in retrospect does it become clear that a particular move narrowed future options or committed the organisation to a certain course. As Coyne and Subramaniam (1996) argue, such pivotal decisions are difficult to reverse and carry lasting implications for organisational direction. Mintzberg *et al.* (1998b) describe five different approaches that strategists use: act intentionally (plan); be better than

competitors (play); dive into emerging streams of ideas (pattern); adapt to the environment (position); and fulfil the mission (perspective). Beach and Connolly (2005) conceptualise decision-making as a sequence of diagnosing a situation, identifying possible options, taking action, and adjusting as things unfold. From this view, strategy is not delivered as a finished product. It takes shape through situated judgments, iterative choices, and the hands-on work of making things happen.

While decision-making is essential to strategising, strategy formation extends beyond rational selection between predefined options (Mintzberg *et al.*, 1976). Rather than following a clear logic, strategy unfolds through narratives that enact strategic direction (Vaara & Langley, 2021). As de Certeau (1988) suggests, spoken and written narratives can act as textual modes of action - through which strategists form strategic reality. Understanding the nature of narratives opens the way to studying even poorly defined strategies (Chia & MacKay, 2007). Immersion in the micro-level flow of speech acts allows researchers to observe how strategising unfolds in a dwelling mode where strategists adapt to circumstances rather than executing a plan. In this mode, strategy is formed through practical coping: responding to internal demands, seeking legitimacy, or mobilising resources for organisational initiatives (Chia & Holt, 2006). A narrative lens draws attention to improvised actions that may appear unclear in the moment but gain meaning over time (Rouleau, 2005). Narratives bring coherence to fragmented actions by positioning people and events within a structured time and space (Czarniawska & Gagliardi, 2003). This thesis adopts a narrative perspective on strategy formation - one that views strategy formed by the stories strategists tell, revise, and enact in practice.

## **1.2. Organisational Identity**

The concept of organisational identity was first articulated by Albert and Whetten (1985) in response to a specific organisational crisis. While observing how faculty at the University of Illinois reacted to the threat of layoffs in 1979, the authors noted that issues of identity are as deep as concerns about survival (Whetten & Godfrey, 1998). Their formulation defined organisational identity through three key attributes: central, distinctive, and enduring. Centrality refers to the values and practices perceived by members as most essential to the organisation's character. Distinctiveness captures the features that set the organisation apart from others in a similar field. Enduring suggests that core attributes persist over time, offering a sense of continuity even as external circumstances change. These three dimensions shaped early debates and have since become foundational reference points in organisational identity research (Gioia, Schultz & Corley, 2000; Pratt & Foreman, 2000). While the notion of enduring identity has been challenged - particularly in work on identity change and adaptation (Gioia *et al.*, 2013) - centrality and distinctiveness continue to serve as analytical anchors. This thesis draws on these conceptual foundations but shifts attention to how organisational identity is constructed through strategising in everyday organisational life. Rather than treating organisational identity as a stable essence, it is approached as an evolving sense of collective self, continuously negotiated through speech and situated practices.

At the early stages of organisational identity research, scholars drew on metaphors from related disciplines, due to the lack of a strong theoretical base within organisational theory (Morgan, 1986; Czarniawska-Joerges, 1993). Organisations were variously likened to machines, living organisms, and even superpersons - entities capable of decision-making and guided by a unified will. These metaphors captured certain functional or behavioural aspects but often projected human characteristics onto complex collectives. The idea of the superperson, in particular, reinforced a top-down image of organisations as coherent actors



pursuing consensus, learning, ageing, and eventually ceasing to exist, much like individuals. These person-like portrayals continue to influence how organisations are described in everyday language - some are labelled visionary and ethical, others bureaucratic or combative. Yet while these analogies remain rhetorically powerful, they obscure the relational and distributed dynamics that underlie organisational life. Czarniawska-Joerges (1992) challenged the notion of organisations as unified, person-like entities, suggesting instead that they consist of interwoven collective actions. This reframing shifted the focus of organisational identity research - from abstract metaphors to practices through which identity takes shape in everyday organisational life. By directing attention to how meaning is maintained through interaction, this perspective laid important groundwork for more practice-oriented approaches to organisational identity.

According to Gioia (2008), the concept of organisational identity remains relevant because it speaks to the concerns of both researchers and practitioners. It provides a framework for studying how shared meanings about purpose, values, and identity are constructed and sustained within organisations. The concept resonates because it helps members reflect on what they believe the organisation stands for and where they see themselves within it. Organisational identity is worked out as members define their responsibilities, rationalise decisions, and seek coherence in the face of organisational change. Research on organisational identity invites ontological reflection: it raises fundamental questions about what the organisation is and what it is becoming. This perspective makes the study of organisational identity focus on how organisations articulate their core purpose and justify their existence. While early studies often treated identity as stable or enduring, later work increasingly emphasised its dynamic and contested nature (Gioia, Schultz & Corley, 2000; Brown, 2006). Attention turned to the drivers of identity transformation, such as strategic change, leadership turnover, or shifting stakeholder expectations (Gioia *et al.*, 2013). This move reframed the study of organisational identity - away from searching for enduring core attributes, toward understanding how organisational identity is constructed, disrupted, and redefined in everyday organisational life.

Scholars have approached the emergence of organisational identity from three main paradigms: the social actor paradigm, the social-constructivist paradigm, and the linguistic-discursive paradigm (Rockwell, 2016). The social actor paradigm views identity as relatively stable, shaped primarily by top management and communicated through formal channels. Within this view, organisational identity is often defined by leaders, who construct coherent narratives intended to guide internal understanding and external reputation. However, this top-down model tends to overlook the ways employees interpret and enact identity, often resulting in misalignment between executive intentions and lived organisational experience. The social-constructivist paradigm addresses this limitation by emphasising identity as a shared accomplishment. It views identity as emerging through ongoing interaction among members, shaped by collective sensemaking and the negotiation of meaning over time (Wertsch, 2002). From this perspective, organisational identity is not imposed but co-constructed, as individuals bring their own stories, values, and perspectives into dialogue with organisational contexts. The linguistic-discursive paradigm takes this further by focusing on the performative power of language. Here, identity is seen as constituted through discourse - through the repeated use of terms, metaphors, and narratives that stabilise meaning and define boundaries. This thesis adopts a linguistic-discursive view, treating organisational identity as a situated and evolving product of strategising in action.

### 1.3. Theoretical Framework

#### 1.3.1. Strategic Intentions Guided by Individual Values

Human values are life preferences that influence how people see the world, form intentions, and act. The theory of basic human values (Schwartz, 1992; Schwartz *et al.*, 2012) was developed to identify universal values across cultures and understand how they affect behaviour. The original theory outlines ten core values, each rooted in a distinct motivational concern, and highlights the dynamic interplay between them. These values differ in their specific orientation or purpose. Human behaviour is driven by how individuals weigh and prioritise their values - rarely does one value act alone. Instead, decisions emerge from compromises between values that may support or contradict each other. Opposing values cannot be realised in the same act, as their motivational goals are incompatible. This framework has been validated through empirical research (Bilsky & Schwartz, 1994; Hitlin & Piliavin, 2004), showing that values group along broader motivational dimensions. Values serve as benchmarks for evaluating choices and provide a long-term orientation for behaviour. Values are emotionally charged and relatively stable. Their influence is often implicit - people act without explicitly recognising the values at play. Intentions, by contrast, are more immediate, tied to concrete goals and situated closer to action than values (Eagly & Chaiken, 1993).

Intentions represent goal-directed commitments shaped by personal values (Bardi & Schwartz, 2003). Intentions occupy a middle ground between broad value orientations and concrete goals - more specific than the former but less narrowly defined than the latter (Locke & Latham, 2002). In practice, strategic goals may involve expanding market share, improving operational efficiency, or enhancing product quality (Naydenova *et al.*, 2018). Decision-makers form strategic goals through cognitive frameworks shaped by intrinsic values taking into account situational demands (Kaplan, 2008). Values influence how opportunities are interpreted, competing aims prioritised, and choices justified (Yasir *et al.*, 2021). The link between values and intentions matters for strategists, as their personal priorities become embedded in organisational direction. Drawing on foundational work in behavioural decision theory (March & Simon, 1958; Simon, 1976) and more recent work on strategic cognition (Hodgkinson & Healey, 2011), strategic intentions are seen as taking form through the situated meaning-making of strategists in relation to their values. Strategic intentions are mental representations - constructed through scenarios, schemas, or conceptual models - that link values to strategic goals (Fayolle *et al.*, 2014; Jarrar, 2021). Understanding how strategists build and refine their strategic intentions is essential for grasping how strategy is formed.

Image theory offers a way to clarify how values, intentions, and actions align in decision-making (Beach & Mitchell, 1987, 1990, 2005; Beach, 1990; Beach *et al.*, 1992). In this context, strategic intentions are defined as value-based commitments to future action, while strategic decision-making involves the situated assessment and enactment of those intentions. According to the theory, decisions unfold through three interrelated cognitive structures known as images: the value image, which contains an individual's core principles and beliefs; the trajectory image, representing a vision of the desired future and the intentions that support it; and the strategic image, which outlines the possible actions for achieving that future. These images operate sequentially, forming a structured line of reasoning. Initially, individuals screen out options that violate their core values; then, they evaluate the remaining alternatives for goal alignment and practical feasibility. This dual mechanism ensures that decisions are consistent with personal

values while remaining sensitive to situational constraints. In organisational contexts, the three images map onto the levels of culture (value image), vision (trajectory image), and enacted strategy (strategic image) (Stephenson, 2012). Because image theory describes how decisions are actually made rather than how they ought to be made, it provides a useful lens for analysing strategic sensemaking in practice (Elsawah *et al.*, 2020). Thus, strategic intentions are constructed and refined through value-based reasoning embedded in context.

### **1.3.2 Strategy Formation as Narrative-Driven Performative Praxis**

A narrative approach to strategising frames it as unfolding through language (Vaara & Fritsch, 2022). Understanding how narratives function makes it possible to study strategy formation that is partially articulated or not fully conscious (Chia & MacKay, 2007). Close attention to language use in situated practices reveals that strategy forms through implicit speech acts embedded in everyday organisational life. Chia and Holt (2006) describe this kind of strategising as a dwelling mode: practitioners do not act on fixed intentions but navigate uncertainty through practical coping with unfolding situations. This stands in contrast to a building mode, in which strategy is formed through prescribed approaches and formal structures. Implicit strategising is closely related to social practices such as seeking recognition, securing resources, or adapting actions to changing conditions. The narrative perspective suggests that seemingly inconsistent and even ungrounded actions may carry strategic significance when interpreted within a broader context (Rouleau, 2005). Narratives create intelligibility by weaving together plot and character, linking fragmented verbal and physical actions that would otherwise appear inconsistent if reported in a simple chronology (Czarniawska & Gagliardi, 2003). To deepen this view, the thesis turns from the narrative function of language to its performative role.

From a performative perspective, language brings strategy into being (MacKenzie, 2006). Strategising - through adaptive adjustments and minor shifts in direction - can be seen as situational efforts to find the right path in a changing environment. Research shows that viable and effective strategies can be formed through spontaneous, provisional responses to unexpected circumstances (Bouty, Gomez & Chia, 2019). These improvised micro-actions become relevant through language. Strategic linguistic practices - understood as performative strategising (Cabantous, Gond & Wright, 2018) - do not merely convey strategic intentions but actively constitute strategic action. In this view, language performs rather than describes: speaking, under the right conditions, is itself a form of acting. Drawing on Austin (1962), strategic linguistic practices enact strategy through utterances whose force depends on the speaker's intent and the appropriateness of the context. Austin (1962) distinguishes between three types of speech acts: locutionary (producing meaningful statements), illocutionary (expressing intention), and perlocutionary (generating effect). These distinctions offer insight into how strategists - owners and executives engaged in strategic decision-making - use language to initiate and steer action. Attending to the nuanced details of strategists' everyday speech reveals how strategy is practically enacted in a discursive context.

Strategy discourse does not neutrally describe organisational reality but actively constructs what comes to be practiced as strategy (Knights & Morgan, 1991). Strategy discourse sets the conditions under which strategising makes sense - through talk and action. This sense is not fixed but negotiated through practical interactions. From this perspective, strategising may be viewed as praxis: micro-level activities enacted by

strategists, drawing on and reshaping shared understandings (Whittington, 2006). To grasp how these shared understandings are constructed, the thesis turns to the concept of discursive formations - relatively stable configurations of meaning that share structural and functional similarities (Foucault, 1976). These formations reflect both prescribed discursive practices rooted in dominant strategic frameworks and more intuitive forms of sensemaking based on situated, improvised actions. The functioning of discursive formations is close to the mediating role of social cognition (van Dijk, 1993), associated with individual reactions to shared social structures. To capture the complexity of strategy discourse, the thesis approaches the speech acts of strategists as a mix of overlapping and even contradictory strategic voices, understood as polyphony (Bakhtin, 1984). This approach explains how strategic decision-making unfolds as a discursive form of doing.

### **1.3.3 Organisational Identity Attainment Through Performative Strategising**

Organisational identity attainment is not about discovering a fixed essence but about making sense of how "we are becoming" through the unfolding of strategic action (Chia, 1996; Gioia *et al.*, 2013). Rather than expressing a stable core, organisational identity gains meaning as members connect past actions with current intentions and anticipated futures (Hatch & Schultz, 2002; Brown & Humphreys, 2006). Organisational identity is constructed internally - through shared understandings among members - and projected outward via symbolic signals, practices, and communication (Sveningsson & Alvesson, 2003; Heckert, Boumans & Vliegthart, 2022). Disruptions to these shared understandings can significantly weaken organisational effectiveness, making organisational identity a matter of strategic importance (Rockwell, 2016). As a result, organisational identity is often viewed in close connection with strategy (Oliver, 2015). Organisational identity is not given in advance - it emerges through everyday practices with broader organisational narratives (MacIntyre, 1981; Tsoukas, 2010). These narratives offer interpretive points of reference for navigating ambiguity and rethinking meaning in the face of uncertainty (Weick *et al.*, 2005). As strategy unfolds in improvised and negotiated ways, organisational identity forms in parallel - co-constructed through discursive practices (Kornberger & Clegg, 2011; Beelitz & Merkl-Davies, 2012). From this perspective, organisational identity is not static but continuously redefined through strategising.

Being socially structured, organisations form their identities through linguistic practices (Czarniawska-Joerges, 1994). Narratives are central to how organisational identity is attained, sustained, and adjusted through strategising (Ala-Kortesmaa, Laapotti & Mikkola, 2022). Hampel and Dalpiaz (2023) show that organisational narratives enable members to integrate diverse experiences - past events, present practices, and future aspirations - into coherent frameworks that guide identity work through strategic sensemaking. In a broad sense, strategy formation can be seen as a fiction, since strategy "tells stories" about an imagined future that has not yet happened and may never happen (Barry & Elmes, 1997). At its core, strategising is storytelling that is attractive and compelling to all organisational members. Strategic linguistic practices shape dominant narratives that reflect organisational policies and the distribution of power within the organisation. There are various genres of strategic narratives, based on the one hand on generally accepted tools for strategy formation, and on the other hand on intuition - manifested through prescribed and intuitive practices of strategic decision-making (Prokushenkov, 2023). Narrative approaches to strategy formation

contribute to the establishment of strong links between the micro and macro levels in organisations (Vaara, Sonenshein & Boje, 2016). Narratives fill organisational activities with meanings, set directions and serve to the rethinking of organisational identity (Fenton & Langley, 2011).

Attaining organisational identity through performative strategising requires ongoing interaction between language, practice, and situated context. Within the framework of language-based strategy work, strategists act as knowledgeable agents performing linguistic roles that are both reflexive and responsive (Mantere, 2013). Strategising becomes a language game in which participants use strategically loaded terms and discursive framings that take on meaning within specific organisational settings. Strategy triggers organisational practices (Merkus *et al.*, 2019), and these practices in turn shape and simultaneously shaped by organisational identity. This reciprocal relationship is complex, indirect, and often inertial, as organisational identity offers both enablers and constraints for strategic action (Ashforth & Mael, 1996). At the individual level, the interplay between personal and organisational identities forms a space of possibility where actors align self-understanding with collective goals. This space makes it possible to integrate diverse identity claims into shared organisational narratives. From this view, strategising is about enacting identity through discursive practices across multiple organisational levels and timeframes. Oliver (2015) summarises three complementary research streams linking identity and strategy: identity as a strategic resource, as a lens for decision-making, and as a form of strategic work. These perspectives reinforce the idea that strategy does more than influence organisational identity - it plays an active role in constituting it.

Summarising the theoretical part of the thesis, it is important to note that the author shares a generative view of complex social reality, which implies the possibility of active interaction of necessary and internal relations that form phenomena with the potential for implementation in certain conditions (Sayer, 1984). Besides, studying personal manifestations in organisational settings, it is necessary to build a theoretical construct that links the individual and organizational levels. However, such approach is associated with the need to consider ontological emergent properties, understood as additional characteristics of organisational members, such as novelty, irreducibility, inexplicability, and unpredictability (Zahle & Kaidesoja, 2019).

## **2. Methodology**

### **2.1. Research Design**

In this thesis, pragmatism is adopted as the overarching philosophical stance. Rather than being tied to one ontological or epistemological camp, pragmatism is concerned with whether knowledge is useful in practice and whether methods help to answer the questions at hand. This makes it well suited for research designs that combine statistical work with qualitative inquiry, as is the case here. Johnson and Onwuegbuzie (2004) call pragmatism a paradigm “whose time has come” because it allows researchers to use different forms of evidence without forcing them into a false choice between quantitative and qualitative traditions. Morgan (2007) makes a similar point, noting that pragmatism provides a methodological middle ground by emphasising abductive reasoning - the back-and-forth movement between data and theory that often happens in real research practice. Biesta (2010) grounds this position in Dewey’s idea that knowledge is created through inquiry: people face problems, try out possible solutions, and refine their understanding through action (Dewey, 1916/2007, 1938/1991). From this view, knowledge is always provisional and evaluated by its consequences, which avoids both the objectivism of positivism and the relativism of interpretivism. In this thesis, pragmatism provides a coherent umbrella under which a survey, discourse-analytic work, and grounded theory can be combined, keeping the focus on the research questions and on meaning-making in practice.

The research unfolded in three interconnected stages, aligned with the four research questions. The first stage examined the relationship between strategists’ personal values and their strategic intentions (RQ 1), addressing what drives strategy formation at the individual level. This involved analysing strategists’ attitudes towards power versus revenue generation, profit withdrawal horizons, investment in research and development, adherence to ethical standards, and fulfilling a role in society. The second stage focused on the role of narratives in strategic decision-making (RQ 2) and the praxis of strategy formation performed through language (RQ 3). Narrative-driven strategising was studied through observations of discursive practices and the interaction of strategic voices in real-time coaching sessions. The third stage centred on identifying the features of organisational identity attained through performative strategising (RQ 4). The study was conducted in an electronic engineering company by tracing strategic linguistic practices across retreat exercises, interviews, and observations. Taken together, the three stages form an integrated line of inquiry moving from value-based strategy formation, through narrative-driven strategic practices, to organisational identity work, reflecting the nature of performative strategising. This research design integrates quantitative and qualitative approaches within a pragmatic orientation, selecting methods according to the research questions while maintaining attention to situated meaning-making in practice.

### **2.2. Data Collection**

To address RQ 1, data were collected through purposive sampling using the authors’ professional network to reach business owners actively engaged in strategy formation. The final dataset comprised 682 respondents representing 39 countries and a broad range of sectors and ownership structures. An online questionnaire was designed with three sections. The first gathered demographic and role-specific

information, including age, gender, education, share of ownership, and length of tenure as an owner. The second section applied the 21-item Portrait Values Questionnaire (PVQ) to assess individual basic human values (Schwartz, 2003). The third section measured strategically significant attitudes reflecting strategic intentions, covering dimensions such as prioritising power versus revenue generation, profit withdrawal horizons, investment in R&D, adherence to ethical standards, and fulfilling a societal role. Recruitment emphasised voluntary participation and confidentiality to ensure honest responses. The purposive sampling allowed access to reflective strategists willing to engage with value-based questions central to strategy formation. While reliance on a personal network may introduce bias, it provided an effective way to a diverse international sample of strategists, enabling the study to capture individual value orientations and their connection to strategic intentions across varied institutional and cultural contexts.

To examine RQ 2 and RQ 3, the study focused on practitioners actively engaged in strategising in their organisations, including founders, co-owners, and senior managers. Sixteen participants from thirteen countries were selected through purposive sampling to ensure access to live strategic work. Data were gathered through a series of online coaching sessions designed to address real-time strategic challenges in participants' organisations. The sessions created an interactive space in which strategic talk unfolded under conditions resembling everyday decision-making rather than staged interviews. This design enabled the capture of narrative-driven strategising and the discursive interplay of strategic voices as practitioners articulated, negotiated, and reframed their intentions. Data included full transcripts of the sessions and reflective notes. Organisational contexts varied in size, maturity, and ownership structures, which added depth to the analysis of how narratives shape strategic decision-making across different settings. The use of live problem-solving conversations allowed discursive practices to emerge naturally, offering insight into the micro-level enactment of strategy through language and supporting the study's aim to understand performative strategising as situated praxis.

To answer RQ 4, an inductive longitudinal study was conducted within an electronic engineering company, tracing organisational identity attainment from founding to maturity. Multiple sources of data were combined to capture the organisation's strategic linguistic practices. Semi-structured interviews were conducted with the founder and CEO, supplemented by strategic coaching sessions focused on critical pivots in organisational development. Archival materials provided historical depth, including corporate statistics, PowerPoint presentations, press coverage, website content, and working documents from the company's strategic retreat. In addition, the author engaged in on-site observation, interacting with managers and employees and documenting strategic conversations in organisational settings. This combination of data sources enabled triangulation and a longitudinal view of how organisational identity was enacted through strategising. The embedded approach allowed tracing links between micro-level speech acts and the collective sense of "who we are" as an organisation, making it possible to study organisational identity attainment through performative strategising. The data provided a contextually rich basis for theorising the co-evolution of strategic practices and organisational identity.

### 2.3. Analysis Techniques

The methodological approach of this thesis combines quantitative and qualitative techniques within a pragmatic orientation, integrating methods according to their usefulness in addressing the research questions. The overall design follows a sequential logic that connects individual values, narrative-driven strategic practices, and organisational identity work to address the central research question. The first study applied a quantitative survey to examine the relationship between strategists' personal values and their strategic intentions, providing an entry point into value-based strategy formation at the individual level. Building on this, the second study analysed live strategic conversations to observe how narratives within discursive practices enact strategic decision-making in real time. The third study extended this perspective longitudinally within organisational settings, tracing how strategic linguistic practices contribute to organisational identity attainment. Conceptual coherence is maintained by analysing all findings through a pragmatic lens, while retaining a strong emphasis on meaning-making and situated enactment over predictive generalisation (Burrell & Morgan, 1979/2019). Taken together, survey data, live coaching sessions, observational notes, strategic conversations, and archival records form a multi-layered methodological structure that links strategists' values and narratives with organisational identity attained through performative strategising. By aligning diverse approaches under a pragmatic stance, the chosen research design addresses the research questions across multiple levels of analysis.

To address RQ 1, the analysis examined the relationship between strategists' basic human values and their attitudes taken as indicators of strategic intentions. Values were measured using the Portrait Values Questionnaire (PVQ) (Schwartz, 2003), which operationalises ten motivational value types through self-reported similarity judgements. The outcome variables were derived from attitudinal measures designed to capture orientations underlying strategic intentions across economic, societal, and ethical dimensions. Pairwise correlations were calculated across sixty combinations of values and intentions to identify patterns of association. Spearman's rank correlation was applied to all variables due to the ordinal scale of the data and its non-parametric distributional characteristics. The results include descriptive statistics, the Spearman's coefficient, and the p-value for tested pairs with respect to the internal consistency among variables. The analysis was conducted using PAST, a statistical package designed for non-parametric correlation and distribution-free techniques (Hammer *et al.*, 2001). Rather than aiming for prediction, this stage sought to surface meaningful connections between strategists' individual values and their strategic intentions, providing a structured point of entry into value-based strategy formation and setting the ground for the subsequent qualitative studies.

Considering strategy formation as social action enacted through language (Fairclough & Wodak, 1997), critical discourse analysis (CDA) was applied to transcripts of live strategic sessions to address RQ 2 and RQ 3. CDA was selected because it allows examining how linguistic practices shape and transform social reality (Jørgensen & Phillips, 2002). Within the thesis's pragmatic stance, CDA serves as an interpretive tool that helps uncover how strategists construct meaning in practice. This approach focuses on uncovering the dynamics through which meaning is negotiated and strategic intentions are enacted. Analysis concentrated on practitioners' speech acts, tracing how narratives and discursive moves interacted to form strategic decisions in real time. Following Fairclough's (2013) conception of CDA as explanatory critique, attention was paid to the interplay between immediate conversational contexts and the broader organisational and institutional structures informing them. This approach made it possible to map discursive practices in strategising (Vaara, 2015).



By capturing these discursive practices, CDA provided the analytical depth required to understand narrative-driven strategising as performative praxis. This stage clarified how narratives - as the key bridge between individual meaning-making and emergent strategic action - can serve as a reliable foundation for understanding strategic decision-making, while a normative value model proved insufficient.

To address RQ 4, constructivist grounded theory was applied, adopting the perspective that “the viewer creates the data and ensuing analysis through interaction with the viewed” (Charmaz, 2000). In line with this approach, data were treated not as a fixed reality but as meaning co-constructed through the researcher’s engagement with organisational members in their situated context. Analysis followed Glaser’s (1978, 1992) framework, moving from substantive to theoretical coding. Substantive coding began with open coding, conducting line-by-line examination to capture emerging conceptual insights, followed by selective coding to cluster properties around three central categories: individual experiences of organisational members, interactions within the organisation, and the external environment. Theoretical coding then integrated these categories into a cohesive account of organisational identity attainment. This approach enabled tracing how strategic linguistic practices linked micro-level speech acts to organisational identity work. Following the value survey and the CDA on strategic narratives, this stage provided the longitudinal and organisational lens of the thesis, linking individual meaning-making and strategic discursive practices with the ongoing construction of the organisation’s collective sense of self. In doing so, it completed the methodological sequence by situating performative strategising within the dynamic attainment of organisational identity.

Together, these analytical approaches provided a multi-layered view of performative strategising, integrating individual values, narrative practices, and collective identity work under a consistent pragmatic stance. To consolidate the methodological choices across the three studies, Table 1 summarises the core elements of the research, including the focus of each study, the data used, the techniques applied to collect them, and the methodological approaches adopted for analysis.

*Table 1. Summary of Methodological Approaches Across the Three Studies*

Study	Data	Data Collection	Analysis
Strategists’ values and strategic intentions	Responses to PVQ, attitudinal measures of strategic intentions	Online questionnaire	Spearman’s rank correlation analysis
Narrative-driven performative strategising	Transcripts of live strategic sessions; reflective notes	Online coaching sessions	Critical Discourse Analysis
Organisational identity attainment through strategising	Transcripts of interviews and strategic sessions; archival documents; observational notes.	Embedded longitudinal study	Constructivist Grounded Theory

### 3. Results

Results from the first study addressing RQ 1 revealed distinct patterns in how strategists' personal values relate to their strategic intentions. Correlation analysis identified the intention to gain power (as opposed to generating revenue) as value-expressive, showing positive associations with higher order value self-enhancement. The intention to fulfil a role in society emerged as value-ambivalent, simultaneously linked to higher order values self-transcendence, self-enhancement, and openness to change. This pattern indicated correlations across opposing sides of Schwartz's circular value structure, challenging the assumption that contradictory values cannot jointly support the same strategic orientation. Beyond these two patterns previously recognised in value research, the analysis revealed two additional configurations not reported before. The intention to generate revenue (as opposed to gain power) appeared value-unmanifested, showing no significant associations with any of the basic values. A further category, value-quasi-manifested, appeared for two intentions: investing in R&D correlated with higher order values self-transcendence and openness to change, while adherence to ethical standards correlated with higher order values self-transcendence and conservation. Together, these findings outline four distinct value-intention configurations, extending beyond prior classifications by introducing value-unmanifested and value-quasi-manifested types alongside value-expressive and value-ambivalent ones. The results provide the empirical baseline for connecting value orientations to subsequent narrative-driven performative strategising. A structured overview of these results is presented in Table 2, which summarises the six strategic intentions, their associated value correlations, and their classification into the four identified configuration types.

*Table 2. Summary of Results from Study 1: Strategic Intentions and Value Configurations*

Strategic Intention	Correlated Higher Order Values	Resulting Configuration	Interpretation
Gaining power (vs. revenue generation)	Self-enhancement	Value-expressive	Intention reflects the dominant motivational goal
Revenue generation (vs. gaining power)	None	Value-unmanifested	Intention not grounded in personal values
Profit withdrawal time horizon	None	Value-unmanifested	Intention not grounded in personal values
Investment in R&D	Self-transcendence, Openness to change	Value-quasi-manifested	Intention grounded in two higher order values
Ethical adherence	Self-transcendence, Conservation	Value-quasi-manifested	Intention grounded in two higher order values
Role in society	Self-transcendence, Self-enhancement, Openness to change	Value-ambivalent	Intention grounded in contradictory values

Results from the second study addressing RQ 2 and RQ 3 highlighted how narratives form strategic decision-making. Analysis of strategists' speech acts in recorded sessions revealed two distinct narrative forms: conceptual narratives - articulated the reasoning and structure behind strategic choices, and empirical narratives - linked to personal experience and anticipated outcomes. Sessions with sixteen participants showed the interaction of conceptual narratives and empirical ones - supporting and reinforcing each other in shaping strategic orientations. This dynamic was evident across all stages of strategising, from identifying strategic challenges to articulating action steps. The analysis traced how prescribed strategic practices, borrowed from conventional strategy language, were blended with intuitive, situationally responsive practices emerging in real time. Practitioners used common strategic terminology while simultaneously adapting it through personal sense-making and reactive sense-making - in response to the immediate context. These findings captured the performative dimension of strategising, where narratives did not merely describe intentions but actively constituted strategic action. By linking strategic discursive practices to immediate decision enactment, the study demonstrated narrative-driven strategising as a situated, performative praxis rooted in the interplay between conceptual coherence and lived experience. A summary of these results is presented in Table 3, which highlights the role of conceptual and empirical narratives, their interaction, and their performative contribution to strategising.

*Table 3. Summary of Results from Study 2: Narrative-Driven Performative Strategising*

<b>Element of Strategising</b>	<b>Key Findings</b>	<b>Function in Strategic Decision-Making</b>	<b>Contribution to the Thesis</b>
Conceptual narratives	Articulate reasoning behind choices	Provide coherence, anchor strategic orientation in abstract frameworks	Show how strategy is justified and legitimised
Empirical narratives	Link decisions to personal experience	Connect intuition with future outcomes	Make strategy actionable and context-specific
Interaction of narratives	Conceptual and empirical narratives co-evolve through mutual reinforcement and adaptation	Blend prescribed strategising with situated practices	Demonstrate strategy as narrative-driven and dynamic
Performative dimension	Narratives do not describe but enact strategy	Strategic speech acts actively constitute strategic action	Advance view of strategising as performative praxis

Results from the third study addressing RQ 4 traced organisational identity attainment over eighteen years of strategic work in the focal company. Analysis of strategic linguistic practices revealed that the vision to create the best workplace for Eastern European professionals, together with the founding narrative - "we are brave electronic engineers!" - served as an initial reference point for identity claims rather than a fixed essence. Narrative material from the strategic retreat and interviews showed that

identity work unfolded through three core dimensions: organisational members' personal experiences, interactions within the organisation, and engagement with the external environment. Within personal experiences, conceptual claims of psychological safety, striving to "be strong," and pride in overcoming obstacles were consistently articulated. Interactions inside the organisation emphasised the importance of exchanging ideas, addressing problems collectively, and working together toward common goals. Engagement with the external environment highlighted readiness to face uncertainty and meet challenges. Storytelling during the strategic retreat - where employees created metaphorical narratives of the company's past, present, and future - enacted identity work through collective discussion, revision, and reinforcement. Interviews further showed that moments of strategic crisis repeatedly triggered renegotiations of "who we are". Thus, the findings captured organisational identity attainment as a dynamic practice. The study demonstrated that strategising simultaneously shaped and was shaped by an evolving organisational identity. These results are summarised in Table 4, which presents the three features of organisational identity attainment, their underlying practices, and their contributions to understanding strategy–identity interplay as performative accomplishment.

*Table 4. Summary of Results from Study 3: Organisational Identity Attainment Through Performative Strategising*

<b>Feature of Organisational Identity Attainment</b>	<b>Underlying Practices and Expressions</b>	<b>Function in Organisational Life</b>	<b>Contribution to Thesis</b>
Self-fulfilment	Psychological safety, striving to "be strong," pride in overcoming obstacles, personal growth	Aligns individual motivation with collective purpose	Shows organisational identity work as rooted in personal experiences
Effective communication	Exchange of ideas, problem-solving, collaboration, striving for unity	Creates shared meaning, enables coordination and adaptation	Demonstrates organisational identity attainment as collective accomplishment
Readiness for external challenges	Courage, ambition, adaptability, facing uncertainty and resource constraints	Connects organisational identity to external demands and strategic resilience	Reveals organisational identity as enacted through ongoing interaction with the environment

## 4. Discussion

### 4.1. Value-Based Strategy Formation

The theory of basic human values (Schwartz, 1992; Schwartz *et al.*, 2012) has been empirically proven to be the most accurate predictor of value-related behaviour among competing theoretical frameworks (Hanel *et al.*, 2018; Lechner *et al.*, 2024). At the same time, recent research highlights important limitations regarding its applicability, emphasizing that the relationship between personal values and behavior is socially constructed, context-dependent, and moderated by cultural and societal factors (Ponizovskiy *et al.*, 2019; Nosrati, Kim & Leung, 2023). This thesis does not aim to directly test Schwartz's theory; rather, it adopts the model as a guiding normative framework for examining how strategists' personal values inform their strategically significant intentions. The literature reflects divergent positions: while some studies report strong structural alignment between personal values and corresponding behaviour (Bardi & Schwartz, 2003; Torres *et al.*, 2016), others challenge this link, arguing that empirical data often fail to fit within Schwartz's typology (Waage *et al.*, 2000) or question the model's theoretical clarity (Gouveia *et al.*, 2014). These contradictions complicate efforts to interpret intentions purely through abstract value dimensions. In this context, the study contributes to ongoing debates by applying a value-based model not to general behavioural outcomes, but to strategically significant intentions - providing a novel entry point into value-guided strategy research.

Some strategic intentions revealed clear value congruence, reflecting what previous studies defined as value-expressive behaviour (Bardi & Schwartz, 2003; Maio, 2010). The intention to gain power (as opposed to generating revenue) showed a strong and direct link to the higher order value self-enhancement (power, achievement, and hedonism). These findings resonate with Bardi and Schwartz's (2003) argument that behaviour often functions as an outward expression of deeply held values, reinforcing the idea that underlying motivational goals can be visible in choices. The connection between strategic intention and strategists' personal values appears straightforward: the desire for influence aligns with values that prioritise status and the ability to shape outcomes. In contrast, the intention of filling a role in society revealed a more complex pattern. It was associated with higher order values such as self-transcendence (benevolence and universalism), self-enhancement (power, achievement, and hedonism), and openness to change (self-direction and stimulation). These overlapping associations point to a blend of altruistic, self-centric, and growth-oriented motivations, suggesting that this intention is pulled in different motivational directions at once. Lönnqvist *et al.* (2013) described such behaviour as value-ambivalent, where an intention reflects overlapping, and at times competing, value priorities. This complexity illustrates that while some strategic intentions are firmly anchored in a single value dimension, others emerge as layered and multifaceted, pointing to the nuanced relationship between values, intentions, and behaviour.

While certain strategic intentions aligned clearly or ambiguously with underlying motivational frameworks, others showed no connection to the ten basic values. One such value-unmanifested intention was generating revenue (as opposed to gaining power) - which showed no significant correlation with any value dimension. One possible reason for this type of relationship between values and intentions could be that strategists perceive revenue generation as detached from their personal value system: values influence behaviour primarily when individuals assess the situation as value-relevant -

otherwise, the connection may remain dormant (Schwartz, 2017). Similarly, Torelli and Kaikati (2009) highlight that values guide action when individuals see value activation as personally or socially significant, which may not apply in financial outcome-driven decisions. Another pattern emerged in what this study called value-quasi-manifest intentions - they showed significant value correlation, but in a fragmented manner - these intentions could not be classified as either value-expressive or value-ambivalent. Such strategic intentions corresponded to two adjacent higher order values within the value structure. For instance, the intention to invest in R&D showed significant correlation with higher order values self-transcendence and openness to change, which could be interpreted as strategists' growth aspirations but can not be called a value-expressive intention. Besides, adherence to ethical standards correlated with higher order values self-transcendence and conservation - which may support assumptions about strategists' efforts to maintain the social status quo, but also can not be considered as a value-expressive intention. These patterns revealed a partial expression of values: intentions are obviously conditioned by values, but are not clearly tied to dominant motivational goals. The connection is present but it's blurred - and manifested through intuitively resonant values rather than through direct correspondence. This quasi-manifestation points to a more subtle form of value-based strategising that defies standard typologies but retains empirical and theoretical relevance.

While Schwartz's theory of basic human values offers a widely recognised model for analysing value-behaviour links, its application to strategic intentions in this study reveals important considerations related to reliability and validity. Although the study demonstrated acceptable reliability, reflected in high internal consistency across predictor variables representing higher order values, several factors constrain the overall validity of the findings. In this thesis, validity is considered not only in terms of technical quality but also in terms of interpretability. Particular attention was paid to whether the applied instruments measured what they were intended to measure, while recognising the limitations inherent in applying a normative value model to strategically situated reasoning. Content validity was addressed by selecting strategically significant intentions through clearly formulated questions that spanned both general and specific domains of strategic work. This approach ensured that outcome variables reflected relevant aspects of real-world strategising. However, construct validity proved more problematic: the value-intention relationships observed were often fragmentary, echoing findings from studies highlighting inconsistencies in value-behaviour alignment (Alexandrova & Haybron, 2016; Hanel & Vione, 2016; Roccas & Sagiv, 2022). These inconsistencies suggest that assumptions embedded in Schwartz's theory may not be adequate for capturing the nuanced and context-dependent nature of value-based strategy formation.

The most significant contribution of this study is that the normative approach to analysing the relationship between individual values and strategic intentions does not yield findings that are both reliable and theoretically meaningful. The results show that strategic intentions do not consistently align with categorised value types and are instead expressed through complex, overlapping, or only partially activated value patterns. This challenges the assumption that values can be used as predictors of strategic behaviour. In response, the study calls for a shift in analytical focus: from identifying which values are expected to drive certain strategic intentions to examining how values are embedded within the ongoing practices that underpin strategic decision-making. Strategically significant intentions - such as those related to gaining power (as opposed to generating revenue), investing in R&D, acting ethically, or establishing a socially meaningful role -

can be more accurately analysed within the values-goals-strategies sequence (Beach & Mitchell, 1987, 1990; Beach, 1990; Beach *et al.*, 1992). From this perspective, image theory (Beach & Mitchell, 2005) offers a more suitable conceptual foundation. While its empirical application to value-guided decisions remains limited, it offers a context-sensitive lens for understanding how values operate not as static predictors but as embedded principles that shape ongoing strategising. This resonates with Comi, Mosca, and Whyte's (2025) argument that value-based strategising is inherently future-making.

## **4.2. Strategic Decision Making Within Discursive Formations**

This study focuses on how strategy takes shape in real organisational settings, where practitioners address complex challenges through situated decision-making. Instead of examining formal plans or idealised futures, the analysis centres on the actual doing of strategy - how it emerges through everyday action. In this view, strategising is understood as praxis: the embodied micro-level discursive activities through which practitioners navigate uncertainty, prioritise issues, and construct meaning around strategic direction (Jarzabkowski, 2005; Whittington, 2006). These activities are not merely technical tasks but interpretive acts - through which practitioners construct what matters strategically. From this perspective, strategy formation becomes visible not as singular decisions, but as an evolving pattern of moves, framings, and judgements performed across multiple interactions (Mantere, 2013; Golsorkhi *et al.*, 2015). These interactions become strategically significant when embedded in narrative practices that situate them within broader organisational storylines. A narrative lens helps illuminate how such interactions are linked and made intelligible. Narratives serve as structuring devices that embed intentions in plots, assign roles, and connect present actions with imagined futures (Fenton & Langley, 2011; Vaara & Tienari, 2011). Narratives provide interpretive templates for navigating ambiguity and guiding decisions (Kaplan, 2008). Treating strategy formation as narrative-driven praxis grounds the analysis in the lived texture of organisational life.

Taking a performative perspective, the thesis examines strategic actions through linguistic practices. Strategic decision-making observed in the field was driven by how practitioners framed strategic problems and constructed priorities through evolving narratives. These narratives made action meaningful and strategically directed. What appeared as fragmented argumentation and reasoning in transcripts gained coherence when analysed as situated narration - where context, past experience, and anticipated futures were brought together in real time. In this sense, strategic speech acts functioned performatively: it not only described strategic challenges, but also actively shaped how they should be overcome. These speech acts were consequential, particularly when they linked shared organisational concerns with value-based justifications. In several sessions, practitioners made strategic choices by reframing issues through metaphors that drew both on normative frameworks and localised interpretations, revealing how narrative elements were enacted and adapted through interactions. Performative use of narratives supports the view that strategy is accomplished through language in action (Samra-Fredericks, 2003; Mantere & Vaara, 2008; Kornberger & Clegg, 2011; Cabantous, Gond & Wright, 2018; Whittle, Vaara & Maitlis, 2023).

The first step in strategic decision-making involves practitioners recognising an issue as strategically significant (Gond, Cabantous & Krikorian, 2022). In the fieldwork, this stage did not follow a formalised checklist but emerged through practitioners' situated efforts to narrate why certain challenges mattered. In live sessions, strategic significance

was discursively assigned to issues through speech acts that rearticulated concerns - such as market entry, product viability, or social impact - not as operational tasks but as turning points within broader organisational trajectories. Naming an issue as “strategic” was a performative act: it reoriented ongoing priorities and invoked future implications (Gond *et al.*, 2016). Rather than applying predefined categories, practitioners discursively constructed strategic relevance in real time, using language to align their actions with a sense of future-oriented importance. These articulations were diverse, reflecting contrasting organisational settings and individual commitments. Yet what unified them was their narrative function: each invocation opened a space in which strategy could be plotted and justified. Viewed through the lens of narrative-driven performative strategising, the second stage - framing - is assessment of strategic problems. The basis for this assessment is strategists’ intrinsic values, placed in the context of strategic discursive practices. By framing issues performatively, practitioners set the stage for subsequent deliberations, allowing the identified challenge to gain narrative weight, urgency, and directional momentum.

The third step in strategic decision-making, interpretation, marks the moment when practitioners assign meaning to the framed strategic issues. This stage can be understood as a sensemaking episode (Cornelissen, Mantere & Vaara, 2015) in which discourse shapes what is considered strategic and how it should be addressed. Interpretation unfolded within a shifting discursive terrain, where practitioners navigated between normative expectations and context-specific understandings. Rather than applying prescribed frameworks, they used metaphors to comprehend how strategy could be performed - describing their decision landscape as navigating a rough sea, racing cars, cooking dinner, playing chess, or gardening. These metaphorical constructs grounded strategic argumentation and reasoning in imagery that clarified direction and constraints. In this way, strategic issues were imbued with emotional tone and practical urgency. The fourth step, strategy attainment, took form as interpretations were translated into provisional commitments. Strategy attainment was performed through situated speech acts in which strategists articulated future steps. These performative utterances - such as identifying a promising pivot, committing to a chosen course of action, or stating team priorities - became moments of enactment. In speaking strategy into being, practitioners moved forward in the living construction of their strategic path. The findings of this study are synthesised in a four-stage model of strategic decision-making (Figure 2), which conceptualises strategy formation as narrative-driven performative praxis. Each stage - identification, framing, interpretation, and attainment - is formed by discursive practices, where practitioners navigate conceptual and empirical narratives. These discursive practices draw on conceptual and empirical inputs and are enacted through argumentation and reasoning. The model contributes theoretically by demonstrating how strategy emerges not through rational calculation or normative alignment, but through the situated interplay of narratives. It advances a view of performative strategising as constituted by discursive formations, where meaning is co-constructed and strategy is enacted in real time. This approach challenges the dualistic view that strategy consists of two distinct phases - planning coherent actions followed by their implementation - and instead treats strategy as a linguistic accomplishment embedded in practice. Practically, the model provides a framework for strategists to reflect on how they assign meaning, justify action, and construct strategy through language. By highlighting the interplay of strategic voices within discursive formations, the strategic decision-making model enables strategists to recognise how their own



discursive practices influence strategic outcomes. It also provides strategic coaches with a framework for guiding clients through reflective dialogue - surfacing implicit value tensions and translating abstract strategic concerns into concrete commitments grounded in organisational realities.

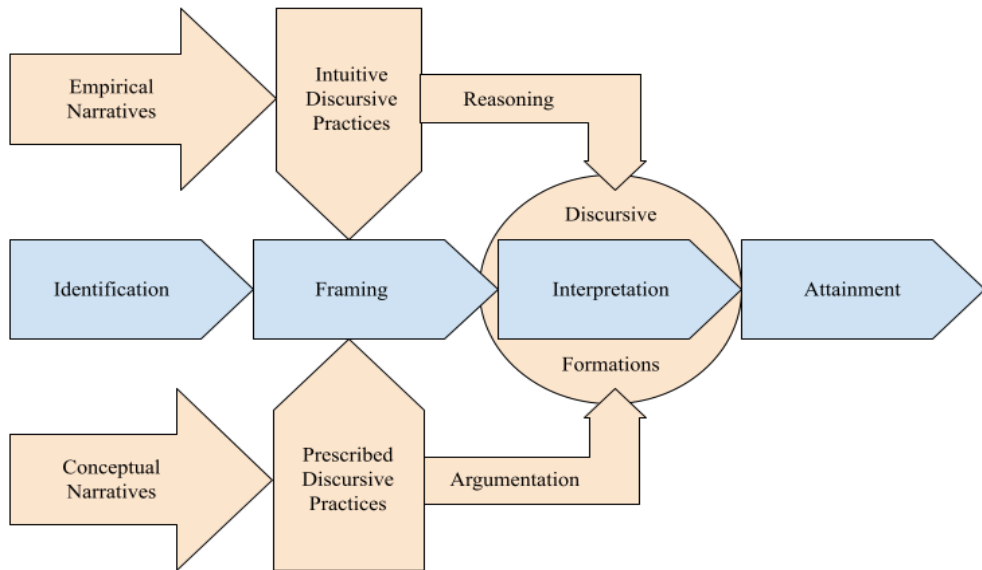


Figure 2. Strategic Decision-Making as Narrative-Driven Performative Praxis. Source: Composed by the author

### 4.3. Features of Organisational Identity Attainment

The organisational setting examined in this study is a mid-sized Eastern European electronics engineering firm whose evolution offers a compelling context for analysing organisational identity attainment through performative strategising. Founded in 2004, the company emerged from its founder's conviction that highly skilled electronic engineers from the region were undervalued in the global market. This sense of professional injustice shaped its initial purpose: to create the best possible environment for engineers, positioning them as respected and competitive actors internationally. From the outset, the founder's vision was articulated through vivid imagery, most notably the metaphor of the company as an "octopus"- a small head, awkward body, and long tentacles - symbolising decentralised decision-making and distributed competencies. Over time, this vision was repeatedly tested by organisational crises, each prompting reconsideration of strategic direction and identity claims (Gioia *et al.*, 2013). Between 2004 and 2017, the company evolved from a family-like entity to a micro-holding and later a divisional structure, navigating inflection points including market loss, internal dissent, and shifts in leadership style. The 2012 "mutiny on board" arose from growing tensions between engineers, who enjoyed privileged status since the company's founding, and other employees who rejected such inequality. This confrontation exposed a deep misalignment between the founder's prescribed organisational identity and the lived organisational reality, making a collective strategic session essential to renegotiate shared identity and clarify strategic direction.

The strategic retreat that followed was designed to address the misalignment between the founder's prescribed organisational identity and the organisation's evolving lived reality (Hatch & Schultz, 2002). Structured as a sequence of facilitated sessions over several days, it brought together the founder, senior managers, and selected employees to reflect on strategic direction and organisational values. While participants did not explicitly formulate features of organisational identity attainment, the retreat generated rich conversational data that revealed underlying identity dynamics (Ravasi & Schultz, 2006). Subsequent analysis of the session transcripts, conducted through coding, made visible the first feature of organisational identity attainment identified in this study: self-fulfilment. This feature was not directly named by participants but became evident in the ways they described their professional engagement - as opportunities for personal growth, mastery, and meaningful contribution rather than performing technical tasks. Such accounts resonate with prior research showing that self-fulfilment is a central driver of commitment and adaptive capacity in knowledge-intensive organisations (Rosso, Dekas & Wrzesniewski, 2010; Kira & Balkin, 2014). In this sense, self-fulfilment acted both as an implicit organising value and as a criterion for evaluating strategic choices, linking personal aspirations with organisational identity.

The second feature of organisational identity attainment identified in this study was effective communication. This was not merely the exchange of operational updates but the intentional creation of shared meaning through dialogue, mutual support, and collaborative problem-solving. Analysis of the retreat transcripts revealed recurring patterns: participants described the value of exchanging ideas, engaging in joint efforts, and openly discussing problems as a way to find like-minded colleagues and align on common goals. These patterns were expressed through vivid narrative episodes, such as metaphors of building bridges to cross divides or constructing a catapult together to "let a miracle in." Such imagery reflected an understanding that strategic success depended on collective voice and mutual responsiveness, rather than isolated expertise. The emphasis on coming together to overcome obstacles, decide on actions, and coordinate efforts resonates with prior research showing that communication is central to sustaining a coherent organisational identity and enabling adaptive coordination (Jarzabkowski, Balogun & Seidl, 2007; Cornelissen, 2012). By reinforcing a sense of unity and accommodating diverse perspectives, effective communication acted as a performative expression of organisational identity attained through narrative-driven strategising.

Readiness for external challenges is the third feature of organisational identity attained through performative strategising. This readiness emerged not as vague aspiration but as a collective stance shaped by the recognition that success in unfamiliar contexts required courage, adaptability, and strategic foresight. The founder noted: "We've grown only when the projects pushed us beyond the usual limits - the bigger the challenge, the more we've evolved." During the retreat, participants constructed fairy tales - setting ambitious goals to make the organisation "known throughout the world," but kept open the means to achieve those goals. Characters in these fairy tales grappled with the uncertainty of such ambitions: some acknowledged the nobility of the goals while questioning their feasibility; others reflected on the need to understand different environments before acting. The motif of preparing for an "unknown journey" captured a shared appreciation that achieving prominence beyond familiar markets involved both ambition and preparation. In some accounts, participants conveyed the tension between bold intent and resource constraints, signalling a pragmatic awareness of external realities. These narratives indicated that readiness for external challenges was not blind

risk-taking but a negotiated alignment between organisational identity claims and the capacities required to overcome articulated challenges. Such an orientation resonates with findings that organisational identity can be reinforced when members collectively navigate external uncertainty (Ravasi & Schultz, 2006; Tripsas, 2009), linking strategic ambition with the organisation's evolving narratives.

Taken together, the three features identified in this study - self-fulfilment, effective communication, and readiness for external challenges - reveal organisational identity attained through performative strategising. These features, illustrated in Figure 3, show how organisational identity claims are sustained and transformed through situated strategic work that links personal aspirations, shared meaning-making, and adaptive engagement with external demands. This study demonstrates that organisational identity is less a stable context for strategy than a dynamic outcome, produced and reshaped through ongoing dialogue and the enactment of strategic work. Theoretically, this contributes to the current research agenda by extending the strategy-identity literature towards a performative, narrative-driven view, addressing calls to examine how micro-level interactions and linguistic practices shape identity attainment (Ravasi, Tripsas & Langley, 2020; Whittle, Vaara & Maitlis, 2023). It highlights the constitutive interplay of meaning-making, capability development, and strategic intent in shaping organisational identity. Practically, the study offers guidance for leaders and facilitators on linking individual fulfilment with organisational purpose, designing strategic conversations that foster cooperation, and viewing external challenges as opportunities for collective growth. Understanding the features of organisational identity attained through performative strategising helps practitioners navigate complex contexts.



*Figure 3. The features of organisational identity attainment. Source: Composed by the author*

## 5. Conclusion

This thesis integrates three interconnected lines of inquiry to demonstrate how strategists' values, narrative practices, and organisational identity attainment co-evolve with strategising. This dynamic unfolds across the studies, where personal values reflect what strategists aim to achieve in terms of underlying motivational goals, yet the empirical findings show that these intentions cannot be fully captured by normative models of value-behaviour relations (Ponizovskiy *et al.*, 2019; Conner *et al.*, 2022). In parallel, narratives play a complementary role by expressing what strategists pursue through performatively constructing their intentions within the situational flow of strategy discourse (Vaara & Tienari, 2011; Whittle, Vaara & Maitlis, 2023). In practice, strategy formation emerges as a polyphony of voices - a dynamic mix of conceptual and empirical narratives that shape strategic decision-making (Bakhtin, 1984; Cabantous, Gond & Wright, 2018). In this view, organisational identity is not a fixed setting for strategising - rather, the two phenomena interact together to form mutually generating results (Hatch & Schultz, 2002; Cloutier & Ravasi, 2019). By linking these elements into a coherent conceptual framework, the thesis offers a renewed perspective on the strategy-identity relationship as performative accomplishment, advancing both theoretical precision and practical understanding of how organisations articulate their identities through strategic action.

Taken together, the three studies build a cumulative argument, linking the enactment of strategists' personal values and narratives to performative strategising as part of organisational identity attainment. Study 1 showed that while strategists anchor their intentions in deeply held values, the translation of these values into strategic priorities depends on situational constraints and negotiations with others, revealing a gap between normative value models and lived organisational practice. Study 2 revealed that strategic intentions are performed through the interplay of conceptual and empirical narratives in strategic conversations, making visible the mechanisms that shape decision-making. Study 3 demonstrated that narrative work contributes directly to organisational identity attainment, showing how strategic discursive practices enact the affirmation, adaptation, or redefinition of evolving organisational identity. In combination, these findings trace a clear trajectory: from the motivational grounding of strategic intentions, through the discursive practices that sustain and adapt them, to the collective accomplishments in which strategy and organisational identity are forged together. This progression clarifies how the core dimensions of strategists' personal values, narratives, and organisational identity converge in situated practices of performative strategising.

The limitations of this thesis stem, first, from its pragmatic and performative orientation, which places emphasis on situated meaning-making in strategising rather than on causal explanation. This orientation offers rich insights into how strategists enact their personal values and narratives - through strategising - within the context of organisational identity attainment, while limiting the extent to which the findings can be generalised beyond comparable settings. Further constraints arise from the chosen methodological design, which integrates quantitative survey data with qualitative discourse-analytic work. While this combination allows for both breadth and depth, it also introduces challenges of alignment between data types and narrows the focus to aspects of strategising that can be meaningfully captured within these formats, reflecting the broader tensions of applying reasoning logics in organisational research (Mantere & Ketokivi, 2013). At the empirical level, snowball sampling was employed to access

strategists actively shaping strategic direction, enabling participation but reducing generalisability and introducing potential network bias. Moreover, the sample comprised only profit-oriented organisations, with most strategists holding substantial ownership stakes - conditions that likely amplify individual influence and reduce applicability to settings with more distributed authority. Besides, socio-cultural and organisational diversity were not systematically addressed. Additionally, although strategies emerged in real organisational contexts, strategists' autonomy to enact their authentic approaches was partly constrained by the framing of the research.

The findings of this thesis suggest several directions for future research. First, given the limitations of normative value-behaviour models, further work should develop a non-normative framework that treats personal values as negotiated and context-dependent, linking them explicitly to intentions and behaviour. Second, future research could examine the dynamics of value manifestation, assessing whether unmanifested and quasi-manifested values occur across diverse organisational and cultural contexts, and tracing how their level of manifestation shifts in response to strategic decision points or organisational change. Third, strategic decision-making as performative praxis should be examined through longitudinal and discourse-analytic studies, tracing how conceptual and empirical narratives influence strategic outcomes. Fourth, further work could analyse the stabilisation and mobility of strategic narratives, following how certain narrative forms become shared reference points within organisations and how they adapt as they move across groups, hierarchies, or organisational boundaries. Fifth, organisational identity attainment through performative strategising should be studied across varied organisational forms, assessing whether features such as self-fulfilment, effective communication, and readiness for external challenges hold across contexts or are contingent on specific structural and cultural conditions. Addressing these directions would advance theoretical understanding of how values, narratives, and organisational identity interact in strategy work, while also enhancing practical applicability.

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## **Abstract**

### **Strategy Formation as Performative Praxis in the Context of Organizational Identity Attainment**

This thesis examines the relationship between strategy and organisational identity, understood as two deeply interwoven yet distinct phenomena in organisational life. While strategy is often seen as a path to long-term success and organisational identity as the shared sense of “who we are,” their interaction is more complex than simple alignment or fit. Recent studies emphasise their relationship as fluid, ambiguous, and constituted through ongoing organisational practices. Building on this perspective, the thesis conceptualises organisational identity attainment as emerging through strategising, defined as situated, performative praxis. It focuses on how strategists’ values and narratives shape strategic intentions, and how their enactment in everyday activities participates in organisational identity attainment. Performativity, understood as “doing things with words,” provides the analytic lens for studying how strategy and organisational identity are co-constructed through linguistic practices.

The research is guided by one central and four sub-questions addressing the links between values, narratives, performative strategising, and organisational identity. The thesis consists of three articles employing mixed methods: (1) a survey to examine how personal values underpin strategic intentions; (2) critical discourse analysis to uncover strategy as narrative-driven performative praxis; and (3) a constructivist grounded theory to reveal how organisational identity is attained through strategising.

The findings contribute to theory in four ways. First, they show that strategic intentions are not directly derived from categorised personal values but emerge from more complex patterns of interaction. Second, they introduce a model of strategy formation driven by narratives that guide strategic decision-making. Third, they show that performative strategising is a polyphony of voices, in which conceptual and empirical narratives converge. Finally, they frame organisational identity attainment as co-constructed through strategising, highlighting its features across individual, organisational, and external levels.

Practically, the thesis provides models to support entrepreneurs and executives in clarifying value-based intentions, recognising the role of narratives in strategic decision-making, and facilitating reflective dialogue about organisational identity.

## Lühikokkuvõte

### Strateegia kujundamine tegevusliku praktikana organisatsioonilise identiteedi saavutamise kontekstis

Käesolev väitekirj uurib strateegia ja organisatsioonilise identiteedi suhet, mõtestades neid kui organisatsioonide toimimisel sügavalt läbipõimunud, kuid samas eristuvaid nähtusi. Kui strateegiat nähakse sageli tee-näitajana pikaajalise edu saavutamisel ja organisatsioonilist identiteeti kui kollektiivselt jagatud arusaama sellest, „kes me oleme“, siis osutub nende vaheline seos keerukamaks kui pelgalt sobivus või vastavus. Hiljutised uurimused rõhutavad nende suhete voolavat ja mitmetähenduslikku iseloomu ning näitavad, et need kujunevad pidevate organisatsiooniliste praktikate käigus. Selle perspektiivi alusel mõistetakse väitekirjas organisatsioonilise identiteedi saavutamist tegevusliku strateegiakujundamise kaudu, mida käsitletakse kui olukorrast sõltuvat ja arenemisjärgset tegevuslikku praktikat. Uuring keskendub sellele, kuidas strateegide väärtused ja narratiivid kujundavad strateegilisi kavatsusi ning kuidas nende elluviimine igapäevastes tegevustes toimub organisatsioonilise identiteedi koostoomes. Performatiivsus, mõistatuna kui „tegevuste tegemine sõnadega“, pakub analüütilist raami uurimaks, kuidas strateegia ja identiteet kujunevad koostoomes keeleliste praktikate kaudu.

Uurimistööd juhivad üks keskne ja neli alauurimisküsimust, mis käsitlevad väärtuste, narratiivide, tegevusliku strateegiakujundamise ja organisatsioonilise identiteedi seoseid. Väitekirj koosneb kolmest artiklist, mis kasutavad kombineeritud uurimismeetodeid: (1) küsitlus, et uurida, kuidas isiklikud väärtused mõjutavad strateegilisi kavatsusi; (2) kriitiline diskursusanalüüs, et avada strateegiat kui narratiivipõhist tegevuslikku praktikat; ning (3) konstruktivistlik põhinstatud teooria uuring, et mõista, kuidas organisatsiooniline identiteet kujuneb tegevusliku strateegiakujundamise kaudu.

Väitekirja tulemused panustavad teooriasse neljal viisil. Esiteks näitavad need, et strateegilised kavatsused ei tulene otseselt kategoriseeritud isiklikest väärtustest, vaid kujunevad keerukamate vastasmõjude kaudu, mis toovad esile normatiivsete mudelite piirid. Teiseks esitavad tulemused mudeli strateegia kujundamisest, mida kannavad narratiivid ja mis raamivad ning suunavad strateegilisi otsuseid. Kolmandaks näitavad need, et tegevuslik strateegiakujundamine on strateegiliste häälte polüfoonia, milles kontseptuaalsed ja empiirilised narratiivid põimuvad strateegia kujunemisel. Lõpuks raamivad tulemused organisatsioonilise identiteedi saavutamise ja strateegiakujundamise kui koostoomes valmiva protsessi, tuues esile selle tunnused indiviidi-, organisatsiooni- ja välisel tasandil.

Praktilises plaanis arendab väitekirj mudeleid, mis toetavad ettevõtjaid ja juhte väärtustepõhiste kavatsuste selgitamisel, narratiivide rolli mõistmisel strateegilises otsustamises ning refleksiivse dialoogi edendamisel organisatsioonilise identiteedi üle.



## **Appendix**

### **Publication I**

Prokushenkov, P., & Wahl, M. F. (2023) Strategic intentions guided by individual values: evidence from business owners. *International Journal of Applied Decision Sciences*, Vol.16, No.1, pp. 67-86.



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## Strategic intentions guided by individual values: evidence from business owners

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**Abstract:** This paper aims to research the relationship between business owners' strategic intentions underlined by attitudes and their basic human values in the form of motivational types. The study focused on business owners' attitudes towards gaining power opposed to revenue generation, profit withdrawal time horizon, investment in research and development, adherence to ethical standards, and filling a role in society. Unfolding the association between strategically significant attitudes of business owners and their personal values is crucial. This is a cross-sectional survey study using Spearman's rank correlation analysis. Purposive sampling was conducted to collect data based on the authors' personal network over a period of five years through a questionnaire among 682 business owners from 39 countries. The results showed that business owners' strategically significant attitudes related to their intentions can be not only value-expressive and value-ambivalent as found in previous studies, but also value-unmanifested and value-quasi-manifested. The theoretical and practical implication of the paper is that studying the relationship between strategic intentions and individual values applying a normative approach weakens the validity of the findings.

**Keywords:** business owners; strategic intentions; attitudes; basic human values; image theory; portrait value questionnaire; PVQ; strategy formation.

**Reference** to this paper should be made as follows: Prokushenkov, P. and Wahl, M.F. (xxxx) 'Strategic intentions guided by individual values: evidence from business owners', *Int. J. Applied Decision Sciences*, Vol. X, No. Y, pp.xxx-xxx.

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Mike Franz Wahl has earned his PhD in business from Tallinn University of Technology in 2011. In 2018, he has achieved the qualification of an International Engineering Educator and is currently working as an associate professor of management and manager of studies at the unit of organisation and management. His primary tasks are to teach, research, supervise, and consult people on general management topics.

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## 1 Introduction

Ownership is fundamental to the emergence and very existence of any enterprise (Berle and Means, 1932; Veranen and Hensle, 2000; Watson, 2005; Foss et al., 2021). Business owners form their strategies based on unique combinations of their desires, intentions, and expectations that are closely related to their intrinsic values (Wahl, 2017). According to image theory, human values and principles are the basis for individual goals, which determine the choice of strategies to accomplish these goals (Beach and Mitchell, 2005). Business owners achieve their goals through ownership strategies that are described and explained in the form of ownership typology (Wahl, 2012). In a broad sense, strategy is the way to win. In a business environment, this means that any strategy has an inevitable intention to achieve a higher level of organisational performance (Carter et al., 2010). To improve organisational performance, business owners put their effort not only into gaining power, generating revenue and increasing profit, but also into investing in research and development (R&D) (Soomro et al., 2020), as well as adhering to ethical standards and contributing to society (Freeman, 1984). This study follows the tradition of the cognitive school of strategy (March and Simon, 1958; Simon, 1976) that occupies a transitional place between prescriptive and descriptive approaches to strategy formation (Mintzberg et al., 1998). The cognitive school views strategy as an ongoing decision-making process at the individual level.

We aim to contribute to a broad discussion about the influence of personal values – through attitudes and intentions – on behaviour (Kluckhohn, 1951; Rokeach, 1973; Bardi and Schwartz, 2003; Lönnqvist et al., 2006; Roccas and Sagiv, 2010; Maio, 2010, 2017; Ponizovskiy et al., 2019). There is a significant amount of research into the individual characteristics of founders, board members, and executives in the broader business context (Hambrick and Mason, 1984; Rumelt et al., 1991; Schein, 1995; Kelly et al., 2000; Ling et al., 2007; He, 2008; Aktaş et al., 2011; Wang et al., 2016). However, the role of business owners with a focus on their personal values in the process of strategy formation is poorly understood. We intend to fill this gap. Studying personality in organisational settings, it is generally accepted to build a theoretical construct linking the individual and organisational levels. We deliberately avoid this approach due to ontological emergent properties understood as additional characteristics of individuals, such as novelty, irreducibility, inexplicability, and unpredictability (Zahle and Kaidesoja, 2019). In order to build a sound theoretical and methodological framework, we intend to be focused on the relationship between business owners' strategic intentions underlined by attitudes and their basic human values in the form of motivational types exclusively at the individual level. We argue that different strategic intentions are deeply interconnected with differences in personal human values. Thus, we propose the following research

question: What is the relationship between business owners' strategic intentions and their basic human values?

The paper is structured as follows. In the introduction, we state which stream of thought we join and we define the research gap. Then, we provide some clarifications regarding the theoretical and methodological aspects of the study. In the section theoretical background and hypotheses development, our efforts are aimed at forming a reliable theoretical framework based on Schwartz's theory of basic human values and image theory created by Beach in the context of the cognitive school of strategy formation. Then, we formulate six hypotheses for testing. In the section data collection and research methodology, we describe the data sample, then, we give the necessary explanations about the variables. Besides, we explain which approach to data analysis is applied and what kind of data analysis software is used. In the section results, we provide the obtained findings in three tables and give the necessary explanations. We begin the discussion by making statements regarding hypotheses. Then, we continue analysing the reliability and validity of the research method and findings. We explain what results we expected to get, and what the obtained results mean in comparison with similar studies. In the end of this section, we explicitly state what is the theoretical contribution of the paper. In the conclusions, we summarise the paper. Then, we explain the most significant constraints of the study and trace directions for future research.

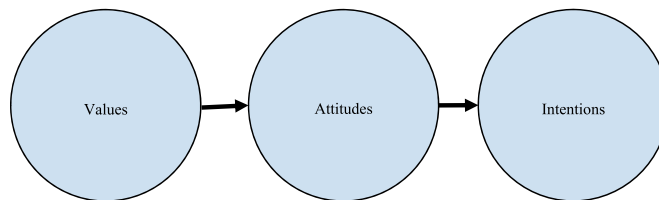
## **2 Theoretical background and hypotheses development**

In this section, our purpose is to build a reliable theoretical construct that sheds light on how business owners' strategic intentions are related – through attitudes – to their basic human values. We share a generative view of the complex social reality, which implies the possibility of active interaction of necessary and internal relations that form the phenomena with the potential to be realised in particular conditions (Sayer, 1984). Human values, attitudes, and motivation play a significant role in the formation of intentions (Thelken and Jong, 2020; ElHaffar et al., 2020). Solesvik (2013) argues that differences in motivation can lead to differences in personal attitude, subjective norm, and perceived behavioural control, and through them – to different intentions. Motivation can serve as an activating element for the intention-action relationship (Carsrud and Brannback, 2011). In the process of forming intentions to achieve goals, human values, attitudes, and motivation are deeply interconnected (Hueso et al., 2020). The significance of the goals is of particular importance. Human values play a critical role not only in how intentions are formed but also in how intentions are actualised in action. Values and motivation can be integrated into the model of intentions (Fayolle et al., 2014). The relationship between motivation, attitudes, intentions, and behaviour (Bandura, 1986; Abbasianchavari and Moritz, 2021) is nonlinear and interdependent. An essential aspect in these interactions is the time factor since intentions do not immediately turn into actions. The process of interaction of intentions and actions is mutually conditioning, namely, intentions can determine actions, and actions influence intentions. Motivation can be a catalyst for converting intentions into actions (Ryan and Deci, 2000). In the process of forming and pursuing goals, connecting bridges between intentions and actions are built (Nuttin, 1984).

By intentions, we mean mental states directed towards the future actions, which differs from intentionality, that is, intentional actions (Searle, 1983). To a large extent,

intentions are driven by attitudes (Eagly and Chaiken, 1993; Cera et al., 2020). Attitude is a set of beliefs and emotions in relation to a particular thing, individual, or event. Attitudes are formed by personal experience or observation and can influence behaviour. Attitudes and behaviour, however, are far from congruent (Chaiklin, 2011). Research shows that the relationship between intentions and behaviour cannot be regarded as stable over time, while the relationship between attitudes and intentions has been stable over a relatively long period of time (Chatzisarantis et al., 2005). Ajzen (1985) claims that attitude is one of the key elements that shapes individual behavioural intentions. At the same time, some experimental studies have questioned that behaviour is a direct consequence of attitudes (Sussman and Gifford, 2019). Bagozzi (1981) found that attitudes affect behaviour indirectly through their influence on intentions. In the process of strategy formation at the individual level, the values-attitudes-intentions relationship appears to be logically consistent and, as a consequence, it is reasonable to be included in the conceptual framework that is represented in Figure 1. At the same time, the relationship between values and behaviour remains ambiguous.

**Figure 1** Conceptual framework: an ongoing process of strategy formation (see online version for colours)



Human values are personal life preferences that underlie attitudes, intentions and behaviour. The two main pillars of modern psychology of values are personality psychology developed under the influence of philosophy, and social psychology related to sociology. Three theories have had the greatest impact on empirical studies of personal values (Cieciuch and Schwartz, 2017). The first was the theory created by Allport and Vernon in 1931. The theory states that every human being is a synthesis of different values, with one is dominant and the others are subordinate. There are six types such as theoretical, economic, aesthetic, religious, social, and political. In this theory, value is understood as an interest and as an evaluative attitude. Rokeach (1973) applied a cognitive approach to the study of human values within the framework of personality psychology. An individual hierarchical value system is a set of beliefs consisting of concentric subsystems. Values are manifested through goal-directed behaviour and identification of desired end states. Rokeach claimed that, unlike character traits, personal values can undergo changes in the course of life, both for individuals and for groups. The set of values that guide all human beings is relatively small. In the Rokeach value system, there are 36 values, 18 of which are instrumental values which reveal intentions, and 18 are terminal values that indicate desired end states.

The theory of basic human values (Schwartz, 1992; Schwartz et al., 2012) was created to measure universal values in the field of intercultural research. Individual human values serve as criteria for selection and justification of actions. The original

theory identifies ten motivationally distinct values and describes the dynamic relationship between them. To better illustrate this relationship, the theory arranges the ten meanings in a circular structure (Figure 2). The differences between values are manifested in their motivational content. Human actions are determined by the relative importance of competing values, that is, actions are determined by a compromise between different values. It is impossible to simultaneously pursue values that are on opposite sides of the circle in the same action – opposing values are motivationally incompatible. This theory has been extensively tested (Schwartz, 1992, 1994), and evidence suggests that values are organised along the motivational dimensions. Values are transcendental in relation to concrete actions and associated with emotions. Values encourage the achievement of goals and serve as standards for assessing the internal and external environment. Basic human values are relatively stable. In everyday life, people make decisions without realising the impact of their values. Intentions in comparison with values are more specific and relate to the desired goals (Schwartz, 1992, 2006). The values to the left of Figure 2 primarily show how a person expresses personal interests, while the values to the right indicate how an individual relates to other people. Four higher order motivational value types based on ten basic individual values in the original theory, defined in terms of their main motivational goals, are presented in Table 1.

**Figure 2** Theoretical model of relations among ten basic human values



Source: Schwartz (1992)

Strategic goals can be, such as increase market share, improve product quality, increase income and/or dividends, reduce costs compared to competitors, increase return on investment, strengthen brand awareness and reputation, increase cash flow, improve customer service, improve and optimise the structure of income sources, etc. (Naydenova et al., 2018). As clearly shown above, strategic goals, intentions, attitudes, motivation, and individual values are closely interrelated (Yasir et al., 2021). Thus, by revealing the relationship between business owners' strategic intentions linked to attitudes and their

basic human values, it is critical to understand how the ongoing process of strategy formation based on values occurs. Indeed, the cognitive school of strategy (March and Simon, 1958; Simon, 1976; Headley, 2021) states that mental processes of strategic goals formation and achievement is largely based on attitudes and intentions that are deeply connected with human intrinsic values and motivation. Using the language of cognitive psychology (Jarrar, 2021; Fust et al., 2021), strategy making means ‘concept attainment’. The mental structures in which the strategy formation process occurs – are usually represented as scenarios, schemes, mind maps, models, etc. Unfolding of how people shape their mental structures is the key to understanding strategy formation at the individual level (Mintzberg et al., 1998).

**Table 1** Higher order motivational value types based on ten basic individual values

<i>Higher order value</i>	<i>Basic value</i>	<i>Core motivational goals</i>
Self-transcendence	Universalism	Understanding, appreciation, tolerance, and protection for the welfare of all people and for nature.
	Benevolence	Preservation and enhancement of the welfare of people with whom one is in frequent personal contact.
	Tradition	Respect, commitment, and acceptance of the customs and ideas that one’s culture or religion imposes on the individual.
Conservation	Conformity	Restraint of actions, inclinations, and impulses likely to upset or harm others and violate social expectations or norms.
	Security	Safety, harmony, and stability of society, of relationships, and of self.
Self-enhancement	Power	Social status and prestige, control or dominance over people and resources.
	Achievement	Personal success through demonstrating competence according to social standards.
	Hedonism	Pleasure and sensuous gratification for oneself.
Openness to change	Stimulation	Excitement, novelty, and challenge in life.
	Self-direction	Independent thought and action choosing, creating, exploring.

*Source:* Schwartz (1992)

Image theory (Beach and Mitchell, 1987, 1990, 2005; Beach, 1990; Beach et al., 1992) determines the relationship between individual values, goals that are connected with attitudes and intentions, and strategies for achieving goals. The theory argues that people adopt and implement plans to achieve goals in order to be consistent with their values. Image theory states that decision-making occurs in three sequential structures that are called images (Miller et al., 1960). The first image consists of the decision-maker’s principles and values. The second one is a trajectory image – a vision of an ideal future or intentions to reach the desired future – that consists of programs to achieve goals. The third image contains ways and means to accomplish goals. The three images represent an abstract sequence, from the acceptance of the goal and ending with its achievement. The choice of solutions depends on the values and principles of the person making decisions,

and on the nature of the problem and on the characteristics of the environment in which the solutions arise. The decision-maker acts in stages, removing unacceptable options with the final choice of the best solution. The critical point is that the screening process focuses on what is wrong with the options, and the final choice focuses on what is right, which are two different processes. In the context of organisational decision-making, the three consecutive frames of image theory are culture, vision, and strategy (Stephenson, 2012). Being non-normative in nature, Image Theory describes the decision-making process as it actually happens, and not how it should be done (Elsawah et al., 2020).

There are six null hypotheses for testing:

- Hypothesis 1    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards gaining power rather than revenue generation.
- Hypothesis 2    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards revenue generation rather than gaining power.
- Hypothesis 3    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards profit withdrawal time horizon.
- Hypothesis 4    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards investment in R&D.
- Hypothesis 5    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards adherence to ethical standards.
- Hypothesis 6    There is no significant relationship, even a weak one, between any of the higher order values of business owners and their attitude towards filling a role in society.

### **3   Data collection and research methodology**

#### *3.1   Data sample*

The study involved 682 business owners – 195 women and 487 men – aged from 20 to 73 years from 39 countries around the world. The data was collected using purposive sampling based on the authors' personal network from November 4, 2013, to November 25, 2018. To achieve the objectives of the study, we created an online questionnaire consisting of three parts. In the first part, the respondents were asked to answer questions regarding their age, gender, educational level, as well as questions that reveal specific owners' characteristics, such as share of ownership, length of stay in the role of owner, and others. The second part of the questionnaire contains 21 questions based on the portrait value questionnaire (PVQ) (Schwartz, 2003). This part allowed us to identify and determine the ten basic human values in the circulatory organised system. The third part of the questionnaire contains questions to determine the business owners'

attitudes to internal and external factors affecting the implementation of their role as owners.

*Outcome variables* that allowed us to reveal business owners' strategically significant attitudes associated with their strategic intentions are based on the respondents' reactions to the following statements:

- 1 Power is a person's ability to force his/her will on other people. Power is more important to him/her than revenue - for the outcome variable gaining power.
- 2 The revenue is more important for him/her than achieving power – for the outcome variable revenue generation.
- 3 Increasing capital (increasing stock price) is for him/her more important than the current benefit (dividends) – for the outcome variable profit withdrawal.
- 4 It is important for him/her to spend a certain amount of profit on further R&D – for the outcome variable Investment in R&D.
- 5 It is important for him/her that his revenue is raised in an ethical way – for the outcome variable ethical adherence.
- 6 His/her company has to fill a role in society – for the outcome variable role in society.

The respondents had the opportunity to choose answers on a scale from 1 to 6 in which '1' means that respondents strongly agree that the intention of the described person is similar to the respondents' intention, and '6' means that respondents completely disagree that they share a similar approach compared to the person described.

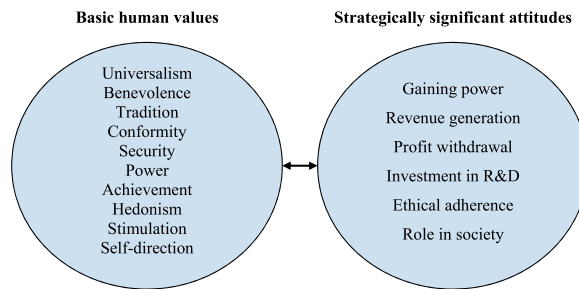
*Predictor variables* are ten basic human values of business owners. The respondents answered 21 questions based on the Schwartz PVQ, which enabled us to determine the degree of manifestation of individual basic human values for each business owner. The PVQ includes different portraits – descriptions of different behavioural patterns. Each portrait describes intentions, goals, aspirations, or desires. For each portrait, the respondents answered: 'How similar is this person to you?' The respondents had the opportunity to choose answers on a scale from 1 to 6 in which '1' means that the respondents strongly agree that this person is similar to them, and '6' means that respondents completely disagree that this person is similar to them. The respondents' own values are derived from their self-assessment of similarity to people who are described in terms of certain values (Schwartz, 2003).

### 3.2 *Method*

Relying on the conceptual framework (Figure 1), we study how business owners' basic human values in the form of motivational types are correlated with their intentions through strategically significant attitudes. The elements for pairwise correlation analysis – 60 pairs in total – are presented in Figure 3. We used Spearman's rank correlation analysis for all variables due to the non-parametric nature of collected data. The results include descriptive statistics, the Spearman's coefficient ( $r_s$ ) and the p-value for tested pairs in the context of the formulated hypotheses with respect to the internal consistency among variables. For data analysis, we used the software PAST. It is a comprehensive software package for performing a wide range of standard quantitative methods of data

analysis and calculations. PAST combines spreadsheet-type data entry with univariate and multivariate statistics (Hammer et al., 2001).

**Figure 3** The elements for pairwise correlation analysis (see online version for colours)



#### 4 Results

Descriptive statistics are presented in Table 2.

**Table 2** Descriptive statistics

<i>Outcome variable</i>	<i>Gaining power</i>	<i>Revenue generation</i>	<i>Profit withdrawal</i>	<i>Investment in R&amp;D</i>	<i>Ethical adherence</i>	<i>Role in society</i>
Mean	4.2771	2.3782	3.3504	2.5000	1.9413	2.8035
Std. error	0.0561	0.0480	0.0566	0.0565	0.0423	0.0595
Variance	2.1477	1.5718	2.1897	2.1798	1.2212	2.4224
Stand. Dev.	1.4655	1.2537	1.4797	1.4764	1.1050	1.5564

As expected, according to the theory of basic human values, the basic values universalism and benevolence that are included in the higher order value self-transcendence demonstrated a moderate degree of correlation ( $r_s = 0.4175$ ), while the separate correlations of these basic values with other basic values remained at a fairly low level. The results for higher order value conservation were also as expected since the basic values tradition, conformity, and security demonstrated a mutual moderate degree of correlation ( $r_s$  is between 0.3309 and 0.4975), while the separate correlations of these basic values with other basic value remained at a quite low level. The basic values power and achievement that are included in the higher order value self-enhancement demonstrated a mutual moderate degree of correlation ( $r_s = 0.5040$ ), while the separate correlations of these basic values with other basic values are at a quite low level, except for a fairly high level of correlation with the nearest basic value hedonism ( $r_s = 0.8529$  and  $r_s = 0.8807$ , respectively) – which, may be due to the intermediate status of the basic value Hedonism, as well as with the basic value stimulation ( $r_s = 0.2913$  and  $r_s = 0.4072$ , respectively) – which, however, considered to be normal due to the compatibility of adjacent values. The basic values hedonism, stimulation, and self-direction that are included in the higher order value openness to change demonstrated a mutual moderate



degree of correlation ( $r_s$  is between 0.3309 and 0.4975), excepting the level of correlation between the basic values hedonism and self-direction ( $r_s = 0.2642$ ), which is low enough but can be explained by the intermediate status of the basic value hedonism.

With regard to the relationship between the predictor and outcome variables, against the background of statistically insignificant and/or very weak associations, we found several statistically significant positive correlations, albeit at a weak level. The outcome variable gaining power showed a positive correlation with the higher order value self-enhancement ( $r_s$  is between 0.2344 and 0.2962). We did not find any significant level of correlation between outcome variables revenue generation, profit withdrawal and predictor variables. The outcome variable investment in R&D showed a positive correlation with the higher order values self-transcendence ( $r_s$  is between 0.1952 and 0.3374) and openness to change ( $r_s$  is between 0.2411 and 0.2951) - we did not take into account the results for basic value hedonism because of its intermediate status. The outcome variable ethical adherence showed a positive correlation with the higher order values self-transcendence ( $r_s$  is between 0.2534 and 0.2772) and conservation ( $r_s$  is between 0.1953 and 0.2308). The outcome variable role in society showed a positive correlation with the higher order values self-transcendence ( $r_s$  is between 0.2717 and 0.3125), self-enhancement ( $r_s$  is between 0.1997 and 0.2835), and openness to change ( $r_s$  is between 0.1989 and 0.3084).

Thus, all the results obtained are summarised in Tables 2, 3 and 4 and used for subsequent analysis.

## 5 Discussion

Following the tradition of quantitative research, we begin this section with a statement regarding the formulated hypotheses. Then, we discuss the reliability and validity of research methods and findings and explain what we expected from the analysis and what was obtained (Belcher, 2009). Based on the results, we can reject the first null hypothesis in favour of the alternative, since the outcome variable gaining power demonstrated a statistically significant positive correlation with the higher order value self-enhancement. We cannot reject the second and third null hypotheses, since the outcome variables revenue generation and profit withdrawal did not demonstrate any significant level of correlation with the predictor variables. We can reject the fourth null hypothesis in favour of the alternative, since the outcome variable investment in R&D demonstrated a statistically significant positive correlation with the higher order values self-transcendence and openness to change. We can reject the fifth null hypothesis in favour of the alternative, since the outcome variable ethical adherence demonstrated a statistically significant positive correlation with the higher order values self-transcendence and conservation. We can reject the sixth null hypothesis in favour of the alternative, since the outcome variable role in society demonstrated a statistically significant positive correlation with the higher order values self-transcendence, self-enhancement, and openness to change.

**Table 3** Correlation matrix for Spearman's rank coefficient (rs) for all variables (see online version for colours)

	UN	BE	TR	CO	SE	PO	AC	HE	ST	SD
Universalism (UN)	0.4175									
Benevolence (BE)	0.2571	0.2357								
Tradition (TR)	0.1804	0.1888	0.4654							
Conformity (CO)	0.2247	0.2050	0.3309	0.4975						
Security (SE)	0.0405	0.1750	0.0406	0.2512	0.1820					
Power (PO)	0.1222	0.1588	-0.0238	0.1479	0.1499	0.5040				
Achievement (AC)	0.0962	0.1922	0.0082	0.2271	0.1904	0.8529	0.8807			
Hedonism (HE)	0.2529	0.2417	-0.1217	-0.0958	-0.0577	0.2913	0.4072	0.4055		
Stimulation (ST)	0.2187	0.2804	0.0041	-0.0690	0.0011	0.1967	0.2592	0.2642	0.3754	
Self-direction (SD)	-0.0246	0.0331	-0.0181	0.1746	0.0576	0.2783	0.2344	0.2962	0.1527	0.0416
Gaining power	-0.0050	0.0493	0.0503	0.0108	0.0669	0.1114	0.0323	0.0710	-0.0381	-0.0008
Revenue generation	0.0848	0.0529	0.1132	0.0643	-0.0113	0.0736	0.0486	0.0662	0.1648	0.0960
Profit withdrawal										
Investment in R&D	0.3374	0.1952	-0.0033	0.0301	0.0638	0.0438	0.1930	0.1418	0.2951	0.2411
Ethical adherence	0.2772	0.2534	0.1956	0.1953	0.2308	-0.0199	0.0333	-0.0021	-0.0111	0.1020
Role in society	0.3125	0.2717	0.0725	0.1787	0.1631	0.1997	0.2835	0.2771	0.3084	0.1989



We note an appropriate level of research reliability due to the high internal consistency among the groups of predictor variables that constitute the higher order values. In turn, the validity of the study is constrained by how reliable it is. We consider validity not only in terms of assessing the quality of the results obtained, but also in terms of the possibilities for interpreting the results. We also attach importance to how the applied tools measure what is supposed to be measured, taking into account, the emerging constraints caused by the nature of the measuring tools. Considering research content as part of a validity argument, we assess how well the selected strategically significant attitudes fit into the broad field of business owners' strategic intentions. We ensured a high level of content validity by choosing outcome variables through clearly formulated questions that cover both special and general areas of business owners' strategic activities. At the same time, the construct validity leaves many questions and can be defined as fragmentary and contradictory, which we also observe in a number of similar studies (Alexandrova and Haybron, 2016). We argue that decrease in the validity level – both for the method and findings – is due to the normative nature of Schwartz model, which served as the basis for measuring business owners' individual values.

We do not seek to test the theory of basic human values, since it is empirically confirmed that Schwartz model is the most accurate predictor among all other models, examining the relationship between values and behaviour (Hanel et al., 2018). However, we consider it reasonable to cite some excerpts that shed light on significant contradictions in assessing the validity of research when choosing Schwartz model to analyse the influence of individual values on attitudes, intentions and behaviour. On the one hand, some studies conclude that "Relations among behaviors, among values, and jointly among values and behavior exhibit a similar structure" (Bardi and Schwartz, 2003) or "The results suggest that the compatibilities and conflicts that structure the relation between values also organise the behaviors that express them" (Torres et al., 2016). On the other hand, some studies claim that "data [2,070 members of the Christian Workers Movement in Flanders] do not fit the theoretical value typology of Schwartz" (Waege et al., 2000) or that "multiple configurations [of Schwartz model] lack parsimony and theoretical focus" (Gouveia et al., 2014).

Considering the results of testing the first hypothesis, we note the complete coincidence of our expectations with what the analysis showed, namely, the outcome variable gaining power positively correlates with the basic values power and achievement that constitute the higher order value self-enhancement. Wherein, the association between the outcome variable gaining power and other basic values remains at an insignificant level. It is reasonable to note that when answering the question on the basis of which the outcome variable gaining power is formed, the respondents had to choose by comparing themselves with a person for whom power is more important than revenue. We can conclude that business owners' strategically significant attitude towards gaining power opposed to revenue generation is directed through value-expressive intention to the same kind of behaviour (Bardi and Schwartz, 2003).

The analysis of testing the second and third hypotheses shows that business owners' attitudes towards revenue generation opposed to gaining power as well as towards profit withdrawal time horizon are directed to what we define as value-unmanifested intentions. We did not expect to get such results. There are neither intuitive expectations, nor theoretical grounds behind the findings that business owners' attitudes towards revenue generation opposed to gaining power, as well as towards profit withdrawal time horizon are not related to their individual values. We had reason to expect that the applied set of

individual values is comprehensive (Schwartz, 1992), which makes it possible to reveal the connections between basic human values and strategically significant attitudes associated with strategic intentions. When unfolding why the attitude towards revenue generation opposed to gaining power is value-unmanifested, we could take into account that individual values are abstract and their relevance is often hidden, especially if the respondent does not perceive their personal values as related to the attitude associated with a certain intention (Schwartz, 2017). We might assume that insignificant correlation between the outcome variable revenue generation and any of the basic values is because business owners do not associate revenue generation with any of their intrinsic values.

The results for the attitude towards profit withdrawal time horizon look inconsistent. On the one hand, we could claim that forming an intention to profit withdrawal in the time frames, business owners should make fairly specific decisions based on their strategic intentions. Research supports the assertion that individual values are more likely to be expressed through value-congruent behaviour when people think more abstractly about their actions, rather than when their actions are specific (Torelli and Kaikati, 2009). However, seemingly abstract, the intention to generate revenue opposed to gaining power has remained value-unmanifested. At the same time, the excessive specificity of the intention to withdraw profit in the short- or long-term, may be an explanation for the insignificant correlation between the outcome variable profit withdrawal and any of the basic values. On the other hand, the planning process activates meaningful individual values and increases their influence on the intention to act (Gollwitzer, 1996). Without a doubt, business owners carefully plan to withdraw profit in the time frames. We might expect that the planning process to achieve strategic goals promotes the explicit manifestation of values. However, the results obtained indicated the opposite. We argue that this is due to the very nature of the normative model for analysing individual values in the complex context of attitude-intention-behaviour relationships.

Based on the results of testing the fourth and fifth hypotheses, we can state that business owners' attitudes towards investment in R&D and towards adherence to ethical standards are value-quasi-expressive. We come to this conclusion because the outcome variable investment in R&D positively correlates with the higher order values self-transcendence and openness to change, which form a more general segment growth-anxiety-free (Schwartz et al., 2012). In turn, the outcome variable ethical adherence positively correlates with higher order values self-transcendence and conservation, which form a more general segment which is characterised by a focus on social fulfilment rather than personal interests (Schwartz, 1992). Although the results of testing the fourth and fifth hypotheses do not provide grounds for unambiguous conclusions, we define these results as expected and intuitively logical.

As for the results of testing the sixth hypothesis, we can see that business owners' strategically significant attitude towards filling a role in society is directed through value-ambivalent intention to the same kind of behaviour (Lönqvist et al., 2013). We draw this conclusion because the outcome variable role in society demonstrated a positive correlation with the higher order values self-transcendence, self-enhancement, and openness to change. Based on intuitive assumptions, we expected that the attitude towards filling a role in society is related to the basic values that are included in the segment of values with a focus on serving public goals as opposed to personal interests. However, the results obtained look controversial. We can speculate that this is due to the importance of environmental and cultural factors in attitude-intention-behaviour relationships (Boer and Fischer, 2013). However, Sanderson and McQuilkin (2017) argue

that prosocial behaviour is not always based on expected consequences in terms of benefit to other people, but may be caused by self-beneficial motivation. The expected consequences and motivation are not perfectly aligned. For instance, the intention to produce green energy may not be determined by the desire to make the world a better place, but by the opportunity to receive additional government subsidies or other economic benefits.

Thus, the most significant contribution of this paper is that the theoretical and methodological foundations of studying the relationship between individual values and attitudes linked to behavioural intentions based on a normative approach cannot produce valid findings. The most obvious solution would be to apply a non-normative approach. Taking into account that values-guided, strategically significant attitudes and intentions, being among the key elements of strategy formation, are included in the values-goals-strategies sequence (Beach, 1990; Beach and Mitchell, 1987, 1990; Beach et al., 1992), we suppose that it would be reasonable to shift the research focus from selection of a set of values that are expected to propel certain behaviour to the ongoing decision-making process driven by values. Beach and Mitchell (2005) claim that image theory arose as an attempt to find a proper theoretical basis for decision-making at the individual level, mostly due to the unsatisfactory results of testing normative theories – largely borrowed from economics – which view people as rational maximisers of expected rewards. The essence of image theory is that each decision-maker possesses values and principles that determine how to act properly. These principles are often not easy to articulate, but they strongly influence decision-making. The main problem with applying this theory to linking individual values to behaviour lies in the authors' original intention to focus the application of the theory on the study of decision-making processes themselves. That is, image theory consistently describes the mental processes of screening for unsuitable candidates and the subsequent selection of the most suitable candidates, while the content part of the connected images did not receive proper development in empirical studies.

## **6 Conclusions**

Answering the formulated research question, we claim that the relationship between business owners' strategic intentions and their basic human values is characterised as complex and hardly predictable. The three pillars of our theoretical framework are Schwartz's theory of basic human values, image theory created by Beach, and the cognitive approach to strategy formation. Results showed that strategically significant attitudes linked to intentions can be not only value-expressive and value-ambivalent, which was found in previous studies, but also value-unmanifested and value-quasi-manifested. Interpretation of the results obtained allowed us to formulate theoretical and practical implications. We argue that a normative approach to the study of the relationship between individual values and intentions underlined by strategically significant attitudes cannot give valid findings due to limitations caused by the normative nature of Schwartz model and also due to insufficiently developed tools for analysing the relationship between elements included in sequential frames of image theory.

The theoretical and empirical limitations of this paper are caused by the nature of the studied phenomena, namely that we are dealing with the psychological reality of human beings since the unit of analysis is the business owner's mind in the process of strategy formation. It is important to mention that all respondents represented profit-oriented

organisations, which added certain limitations to the study. Besides, we noted the high percentage of respondents' ownership shares in their organisations. This fact led us to assume that business owners who took part in the survey play an active role in strategic decision-making in their organisations, in contrast to organisations with dispersed ownership shares, where it is hardly possible to determine the influence of business owners on strategy formation (Hilb, 2006). Besides, the study did not take into account the cultural diversity among the respondents.

In future research, we intend to focus our efforts on building a reliable theoretical construct applying a non-normative approach to studying decision-making in the process of strategy formation at the individual level in the context of business owners' values.

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## Strategy formation as narrative-driven performative praxis

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**Abstract:** This paper seeks to research the performative dimension of strategising at the individual level in the context of strategy-as-practice. The study focuses on narrative-driven praxis being formed by practitioners involved in strategic discursive practices. The interconnections within strategy discourse lead to interdiscursivity that influences strategic decision-making. Revealing interdiscursivity is crucial as it is the key to understanding the praxis of strategy formation. This is action research that involved 16 practitioners from 13 countries around the world. Critical discourse analysis is applied to data collected through purposive sampling during online coaching sessions. The author acted as an executive coach. The theoretical and practical implications of this paper are presented as a non-normative model that describes strategy formation as narrative-driven performative praxis. The constructed model can be used as a theoretical basis for individual coaching sessions on strategy formation.

**Keywords:** action research; coaching; critical discourse analysis; CDA; narratives; decision-making; performativity; strategy formation.

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### 1 Introduction

Being a dynamically growing stream of thought, strategy-as-practice (hereafter SAP) (Whittington, 1996; Johnson et al., 2003; Jarzabkowski et al., 2007, 2021; Golsorkhi et al., 2015) opens new horizons for studying strategy formation. Whittington (1996) claims that SAP focuses on 'strategists and strategising, rather than organisations and strategies'. There has been a change in the strategy research agenda from how organisations should strategise to how practitioners actually do it. In this context, it is reasonable to view strategy formation as ongoing decision-making at all organisational levels (Simon, 1977; Andrews, 1980; Mintzberg and Waters, 1985; Wilson, 2015). Considering the concept of performativity originally formulated as 'doing things with

words' (Austin, 1962), it could be argued that the performative dimension of strategising involves strategy attainment through linguistic practices. It should be noted that the current research agenda on performativity in relation to strategy is not limited to Austin's (1962) original approach (Allard-Poesi and Cabantous, 2021), but also includes such aspects of performativity as efficiency, self-identity, and sociomateriality (Gond et al., 2016). There is significant research interest in studying the practical aspects of strategy formation in relation to decision-making (Eisenhardt and Zbaracki, 1992; Schwenk, 1995; Wilson, 2015; Harrison, 1999; Prezenski et al., 2017; McElroy et al., 2020) and applying a narrative approach (Barry and Elmes, 1997; Vaara, 2010; Fenton and Langley, 2011; Corbett-Etchevers and Mounoud, 2011; Brown and Thompson, 2013; Küpers et al., 2013; de la Ville and Mounoud, 2015; Horst and Järventie-Thesleff, 2016).

However, the actual praxis of strategy formation at the individual level remains poorly understood. This is largely because uncovering mental constructs of strategists' individual practices requires deeper understanding of the human mind and the functioning of the brain (Mintzberg et al., 1998a), which is most often *terra incognita* for strategy researchers. Besides, a significant part of strategy research on decision-making relies heavily on theoretical models constructed by economists, operations researchers, or statisticians for their specific purposes. These models, with the possible exception for structural ones, are normative, that is, they prescribe what should be done, rather than describe how decision-makers act in reality (Beach and Connolly, 2005). This paper aims to fill this gap. The study is intended to contribute to a broad discussion about the practical side of strategy formation (Hax and Majluf, 1988; Slevin and Covin, 1997; Mintzberg et al., 1998b; Wrona et al., 2013; Bouty et al., 2019) by constructing a non-normative model describing the ongoing praxis of strategic decision-making influenced by interconnections between strategic discursive formations. In terms of practical implications, the model can be the basis for establishing reliable coaching practices on strategy formation. Thus, the research question is:

- How strategy is being formed at the individual level during coaching sessions?

The structure of the paper is as follows. In the introduction, the author clearly states which stream of thought research joins, what the research gap is, and why it is important to fill the gap. The setting the stage section presents the current state of affairs in research-relevant areas such as strategy formation, SAP, narrative approach, and decision-making. The conceptual foundations section contains five propositions that form the basis for the subsequent data analysis. The methodology justifies the application of action research, as well as provides the necessary clarifications regarding the critical discourse analysis (CDA). The data section describes purposive sampling and explains how the data was collected. By applying an abductive approach to data analysis, the discussion reflects strategy formation as narrative-driven performative praxis. The conclusions summarise the main implications of the study as well as its limitations. Trajectories for further research are suggested.

## 2 Setting the stage

The universe of strategy research seems to be evolving in accordance with the Hubble law discovered in 1929 for the physical universe. Evidence is that the universe is

constantly expanding, and galaxies, as well as schools of strategy are moving further and further from each other. As a result, nowadays it is becoming more and more difficult to answer the question ‘What is strategy?’ However, both practitioners and strategy theorists want to be among the ‘nicest people’ by choosing and following the best school of strategy (Mintzberg et al., 1998a). The problem is that it is hard to make the right choice, given that ‘we live in a world saturated by strategy’ (Carter et al., 2010). It is generally accepted that strategy has its roots in the art of war, beginning with David and Goliath and then expanding into politics, economics, and business (Freedman, 2013). While the similarities between the Trojan War and modern business are not clear enough, in any case, strategy involves finding ways to win. Strategy as an academic subject originated at Harvard in the 1920s, initially as a business policy course. It was only in the 1970s that strategy was identified as a subject of scientific research (Hambrick and Chen, 2008). The tools for researching and applying strategy arose from industrial economics, and although more recent strategy studies have developed their own agendas, the foundations of business strategy have long been influenced by assumptions and methodologies borrowed from economics.

Despite strategising as formal planning often leads to either adapting outdated strategies or copying competitors’ strategies (Mintzberg, 1987), for most practitioners, strategy remains a plan to achieve desired goals (Fletcher and Harris, 2002). Strategic planning involves analysing the environment, formulating strategic goals as desired future (Locke and Latham, 1990), finding the best positioning, and selecting the necessary resources. Then the approved strategic plan must be implemented. Extensive discussion on the topic ‘why strategy does not work?’ presupposes an inevitable gap between strategy formulation and subsequent implementation, while strategy formation, understood as an ongoing process (Sminia, 2009) driven by strategic intentions (Prokushenkov and Wahl, 2022), can bridge the chasm between strategy planning and execution. Strategy formation is about simultaneous change and fixation, individual exploration and social interaction, cooperation and disagreement, persistence in achieving goals and flexibility in responding to the environment. Strategy formation is ‘judgmental designing, intuitive visioning, and emergent learning’ (Mintzberg et al., 1998a).

While scholars in the United States tend to share common approaches to strategy (Nag et al., 2007), the European strategy research agenda appears to be more fragmented (Seidl, 2007). With all the diversity of research on various aspects of strategy such as power, networking, feminism, discourse and others, European scholars managed to demonstrate an ‘odd shard of sociological sophistication’ (Carter et al., 2010), but failed – with perhaps only a few exceptions – to create remarkable social/intellectual movements (Frickel and Gross, 2005). In this regard, the emergence of SAP (Whittington, 1996) looks like a promising strategy school with the total number of publications approaching one thousand. As an alternative view of strategy, SAP focuses on practice-oriented micro-actions of strategising in a broad social context, going beyond economic efficiency. This approach allows for a comprehensive and deep analysis of strategic work at all levels in organisations. It is reasonable to link the emergence and success of SAP with a ‘practical turn’ in modern social sciences, since practice has become a central theme for understanding the functioning of all social institutions (Golsorkhi et al., 2015). For strategy researchers, immersion in the day-to-day practical activities provides an opportunity to interact directly with practitioners involved in strategy formation.



Of particular interest is revealing of how strategy is formed – as a new reality – using written and spoken words, given that narratives are textual modes of action (de Certeau, 1988). Understanding the nature of narratives paves the way for studying indistinctly articulated and even not fully conscious strategising (Chia and MacKay, 2007). Immersion in the praxis of implicit speech acts allows researchers to study strategy formation in the context of a ‘dwelling’ mode, in which practitioners grope for an appropriate way to strategise through practical ‘coping’, opposed to a ‘building’ mode in which strategising happens on purpose. Implicit strategising is rooted in social practices such as looking for identity, gaining access to resources, and implementing appropriate initiatives to cope with the challenges of organisational development (Chia and Holt, 2006). A narrative approach to strategy formation in everyday interactions shows the importance of practical actions, which often seem inconsistent and even ungrounded (Rouleau, 2005). Narration uses plot and characters to structure disconnected physical and verbal actions which are meaningless if reported in a simple chronology. At the same time, “organising makes narration possible, because it orders people, things and events in time and place” (Czarniawka and Gagliardi, 2003).

Wilson (2015) argues that decision-making is at the heart of strategy. To make strategic decisions, practitioners assess possible alternatives by analysing the economic environment, organisational capabilities and other factors, and then select the best option. To picture a generally accepted approach to strategic decision-making, it would be appropriate to use the metaphor of golf, since strategic decisions have been thought out over a long time (like preparing to hit the ball) and the success of any organisation in the long run (victory in the golf tournament) depends on carefully considered decisions. Having the greatest impact on organisational performance, strategic decisions determine the most significant organisational actions. These decisions ‘are not easily changed once made’ (Coyne and Subramaniam, 1996). Strategy may seem like a grand concept, but any strategy is based on individual decision-making. Noting the importance of decision-making to the strategic process, Mintzberg et al. (1998b) describe five different approaches that strategists use: act intentionally (plan); be better than competitors (ploy), dive into emerging streams of ideas (pattern), adapt to the environment (position), and fulfil the mission (perspective). At the individual level, decision-makers achieve their goals through a certain sequence starting with diagnosing a problem, proceeding to selecting actions to solve the problem, and then implementing the selected actions until the problem is solved (Beach and Connolly, 2005).

### 3 Conceptual foundations

“If you only knew what kind of trash

Poems shamelessly grow in:

Like weeds under the fence,

Like crabgrass, dandelions.”

(Akhmatova, 1965, ‘Secrets of the trade’)

If the word ‘poems’ could be replaced by the word ‘strategies’ in the verses of an outstanding Russian poetess, then these lines convey the author’s understanding of strategy formation at the individual level. Indeed, strategising can be seen as a set of

activities for groping a way that includes adaptive behaviour, incremental changes, and all that everyday ‘trash’. The praxis of performing micro-actions that involve spontaneous responses to numerous minor difficulties caused by unexpected circumstances to achieve relevant goals can create coherent and viable strategies (Bouty et al., 2019). Practitioners prioritise their strategic goals in accordance with their intrinsic values and characteristics of the environment. Decision-making occurs in three sequential structures called images (Beach and Mitchell, 1987), starting with personal principles and values, moving to the vision of an ideal future, and ending with determining how to achieve desired goals. Decision-makers act consistently, eliminating unacceptable options with the final choice of the best solution.

**Proposition 1** Strategy formation is an ongoing search for efficiency focused on what is valuable (internal) and what is relevant (external).

The performative dimension of strategy formation concerns primarily the role of language in strategising. Austin (1962) states that performative utterances are ones ‘in which by saying something we are doing something’. The appropriate context and the seriousness of the speaker’s intentions are basic conditions for performative utterances. The nature of performative speech acts can be locutionary (ostensible meaning), illocutionary (disclosing intention), and perlocutionary (actual effect). One of Austin’s (1962) points is that it is necessary to pay more attention to the details of everyday language, which is of particular importance for analysing the speech acts of practitioners involved in strategy formation. To paraphrase Wittgenstein’s (1922) famous expression from the ‘*Tractatus logico-philosophicus*’, it can be assumed that the limits of the strategists’ language mean the limits of their strategies. Indeed, strategies are formed in the language and evolve with the language. The concept of performativity suggests that the language is not so much describing as it is shaping reality (MacKenzie, 2006).

**Proposition 2** Strategising is a performative praxis formed by strategists’ utterances.

Strategy discourse (Knights and Morgan, 1991) does not describe but establishes what is generally understood as the praxis of strategy formation. Viewed as *la grille*, discourse is constituted by groups of discursive formations – homogeneous structures that have similar features and functions (Foucault, 1976). During coaching sessions, strategic discursive formations can be seen as a variety of short-term mental structures formed by practitioners based on prescribed discursive practices (generally accepted, traditional approaches to strategy formation), as well as on intuitive discursive practices (situational, reactive, spontaneous strategy-making). This understanding of the functioning of discursive formations is close to the mediating role of social cognition (van Dijk, 1993), drawn upon shared approaches to social phenomena, as well as mental operations leading to conclusions.

**Proposition 3** Constituted by strategic discursive formations, strategy discourse is structured by strategic discursive practices.

It is reasonable to consider the speech acts of practitioners – as part of strategy formation praxis – as well as all the relationships that these speech acts generate, not so much as a set of formulated judgments, but as established connections between statements related to different approaches to strategising, within which meaning is attained (Foucault, 1976). This approach involves examining only the set of ‘things said’ as they arise and evolve. It is impossible to grasp the meaning of practitioners’ speech acts outside strategy

discourse. At the individual level, the tension within strategy discourse is caused by interactions between complementary and even conflicting ‘strategic voices’, understood as intertextuality (Kristeva, 1967), which is resolved as polyphony (Bakhtin, 1984) or interdiscursivity that influences strategic decision-making.

**Proposition 4** The interconnections between strategic discursive formations lead to interdiscursivity that influences strategic decision-making.

Coaching is a powerful technique to support decision-makers. As a method to achieve desired goals, coaching was first mentioned by Thackeray in his novel ‘Pendennis’ in 1849 (Garvey et al., 2021). In a playful friendly conversation described in the novel, one of the characters explained coaching by comparing it to moving with a horse-drawn coach from one point to another. However, it is also considered reasonable to argue that coaching – without being so named at that time – can be traced back to the narrative practices of the stone age or to Socratic dialogue in Ancient Greece. The Socratic method includes questioning with the aim of activating critical thinking to assess primarily different points of view, from which it is supposed to choose the best one. Many elements of this approach have a lot in common with modern coaching, although it is generally accepted that the starting point for business coaching is the book ‘The inner game of tennis’ written by Gallwey (1974). The book describes a method for achieving maximum efficiency for tennis players. According to Gallwey (1974), the best result on the court is gained not through mental concentration, but, on the contrary, through a relaxed inner observation focused on changes on the way to success. The tennis player should initiate an internal duality, in which Self 1 who is called the ‘teller’ visualises the desired goal and, based on trust to Self 2 who is the ‘doer’, allows the result to be achieved by practicing non-judgmental observation.

**Proposition 5** Coaching supports strategy attainment.

## **4 Methodology**

Action research is a method of simultaneous study and implementation of activities aimed at transformational changes in the phenomenon under study. Lewin (1946) emphasised the comparative nature of action research intended to analyse the conditions and grounds for the emergence and development of various forms of social interaction. The choice of action research is due to the need for interactive questioning aimed, on the one hand, at strategising for real organisations, on the other hand, at studying strategy formation at the individual level. McNiff and Whitehead (2005) argue that over the decades of action research development, tension has arisen in the selection of research priorities, namely whether it should be paid more attention to actions under investigation, or to research as such as a way of analysing actions. One of the obvious disadvantages of applying action research is that this method is often chosen by involved in organisational life insiders, for whom it is difficult to look at the studied phenomenon from the outside. As for the merits of action research, it is primarily that this method makes it possible to go beyond the knowledge created by external theorists. ‘Action science’ (Torbert, 1981) is focused on solving practical problems – by researchers in the role of active participants, not outside observers – it is empirical study in which knowledge is acquired through action.

The author's intention to apply action research is justified, since the stated goals are planned to be achieved through a pragmatic orientation towards interaction with practitioners for whom the research topic is highly relevant (Eden and Huxham, 1996). During coaching sessions on strategy formation, the construction of independent and unattainable realities is formed by coachees through individual and collaborative cooperation, for which assumptions, intentions, and tools are used within the practice-as-inquiry (Newman, 2000). Considering the critical importance of research validity in conditions of limited repeatability in a taken-as-given framework, the author enters the real praxis of strategising not only to improve existing practices, but also to acquire knowledge (Checkland and Holwell, 1998). The use of action research is reasonable, since the answer to the research question is supposed to be found through active collaboration with practitioners, and the author understands the need to be mainly in the action than to write about the action (Coughlan and Coughlan, 2002). Although Susman and Evered (1978) argue that action research should not justify itself in relation to alternative epistemologies and research approaches, and in addition Schein (1987) highlights that it is sufficient for action research to be justifiable within own terms, it does not seem possible to ignore the requirement for the rigor evaluation of the evidence, which is key to all research, since data, notes, outlines mean nothing if there is no analysis of the evidence (Memering, 1983).

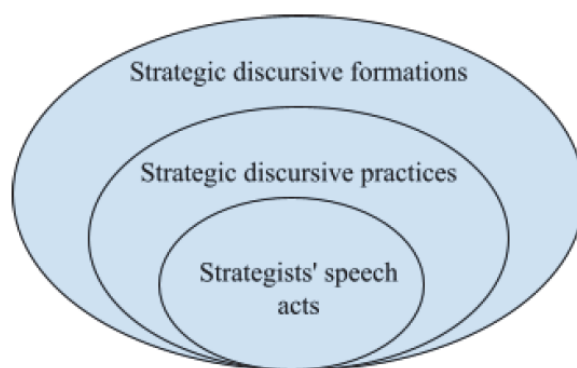
The structure for coaching sessions was built to simultaneously initiate and observe strategic decision-making at the individual level in four sequential stages starting with strategic problem identification, then moving on to framing, then to interpretation and ending with strategy attainment. The basic questions for coaching sessions were designed to allow practitioners form strategy in different modalities. First the coachees identified which strategic problem should be solved, then they assessed the problem in the context of their intrinsic values, then they considered the meaning of the problem, and ended up formulating practical steps to solve the problem. Understanding the coaching session as a praxis of planned communication, the author paid special attention to building two-way interaction – as a discourse of dialogue – relying on cooperation. With a dialogic approach (Phillips, 2011), practitioners were more effective in strategy attaining through 'individual empowerment'. Besides, one of the most significant author's purposes was to initiate an internal dialogue, that is, a way to capture the differences – forming strategy from different angles – in different modalities of coaching sessions. Internal dialogue as part of strategising is critically significant both from Gallwey's (1974) point of view and in the understanding of Bakhtin (1981), who considered meaning-making through language as dialectically formed by various dynamic forces.

Considering narratives as a tool for constructing reality, Bruner (1991) claims that human experience has narrative structure. Narratives are 'the vehicle for cognitively constructing the past, present, and future' (Beach, 2010). The coaching sessions were structured to encourage practitioners to share their stories related to strategically significant events that were happening, are happening and will happen in and around. This was done drawing on the theory of narrative thought (Beach, 2010, 2019; Beach et al., 2016), that aims 'to fill the gap between the realm of neural activity and the realm of subjective experience and action'. The theory states that the human brain builds causal relationships based on the chains of events leading from the past to the present in the form of narratives. This allows people to draw conclusions about what is reasonable to expect in the coming future. Building on this argument, coaching sessions on strategy formation were conducted as an ongoing narrative-driven praxis. This means that

narratives were taken as a basis for strategy formation both in terms of prescribed theoretical approaches and situational intuitive responses. Thus, during coaching sessions, the coachees' cognitive processes were linked – through strategically meaningful storytelling – to the praxis of strategising.

Considering the praxis of strategy formation within strategy discourse as social action (Fairclough and Wodak, 1997), as well as seeing language as access to reality, it is decided to apply CDA to the data obtained in online coaching sessions. In a broad sense, discourse analysis is a method of studying socially determined language manifestations, while the critical aspect of discourse analysis involves highlighting hidden connections and causes (Fairclough, 1992b). CDA 'brings the critical tradition of social analysis into language studies', focusing on discourse and the relationship of social phenomena revealed through language within discourse. The use of CDA is justified since this method is addressing the role of language in the construction and transformation of social reality (Jørgensen and Phillips, 2002). Besides, applying CDA, it is possible to "better map out and understand the role of discursive practices in the micro-level processes and activities constituting strategies and strategising" (Vaara, 2015). Fairclough (2013) claims that CDA should be understood as an explanatory critique that is used not so much to describe existing phenomena and relationships between them, but to explain studied phenomena as consequences of interactions between socially conditioned structures and forces manifested in language. In the context of narrative-driven praxis of strategising, the use of CDA involves the analysis of practitioners' speech acts as results of complex interactions between strategic discursive formations within strategy discourse at the individual level.

**Figure 1** Methodological framework (see online version for colours)



The methodological framework is presented in Figure 1. The analysis of strategists' speech acts allows drawing conclusions about the nature of strategic discursive practices, understood as sets of techniques and established rules inherent in prescribed and intuitive approaches to strategy formation. The complex interactions of strategic discursive practices construct strategic discursive formations – viewed as short-term mental structures – in which meaning is attained. Interactions between strategic discursive formations lead to interdiscursivity, which influences strategic decision-making. Analysing strategists' speech acts, it is crucial to take into account four sequential stages of coaching sessions, which activates different modalities of strategising. It is also worth noting that speech patterns and linguistic features – through which interdiscursivity is

manifested – should be considered in connection with the basic assumptions underlying various approaches to strategising. An abductive approach (Wodak, 2004) was applied to data analysis – the author moved from conceptual foundations to data and then back from data to formulated perspectives for more detailed understanding of the strategy formation praxis. Research validity is ensured primarily by focusing on coherence of analytical statements (Potter and Wetherell, 1987). Another critically important validity indicator is the fruitfulness of the analysis. Thus, research methodology is aimed at an effective analysis of empirical evidence at the individual level using specific tools. Theoretical model building was incremental – from the general to the particular and then back to the general.

## **5 Data**

The purposive sampling was focused on practitioners who strategise on a day-to-day basis in their organisations in various roles such as owners, co-founders, and top managers. Based on the author's personal network, selected strategists were invited to participate in hands-on coaching sessions to solve real-world strategic problems. The research involved 16 practitioners – seven women and nine men – from Armenia, Australia, Austria, Belarus, Canada, Estonia, Germany, Iceland, Lithuania, Portugal, Russia, USA, and Venezuela. Participants addressed the strategic challenges of their organisations, which varied significantly in ownership structure, maturity, size, geographic and operational characteristics. All practitioners were actively engaged in responsible strategising in real settings. Online coaching sessions took place in video format via Skype from April 16, 2020 to June 10, 2021 and were recorded with the permission of the participants. In total, 22 sessions were held, that is, with some strategists there was more than one session. All recorded video material has a duration of 16 hours and 15 minutes, that is, on average, each session lasted about 44 minutes, while the shortest session lasted 25 minutes, and the longest session was 1 hour and 5 minutes long.

Bergman and Coxon (2005) argue that data is interpreted observations while data collection is selective choice of empirical phenomena and attribution of their relevance to the research question. The structure of coaching sessions was built in such a way as to enable participants to strategise in different modalities, that is, to look at strategy from different perspectives. As a rule, after 3–5 minutes allotted for small talk to tune the coachees to the wave of strategising, there was a switch to the first module, which activated the first modality – the identification of a strategic challenge. In the first module, it was crucial to determine what strategic problem should be solved. Such an approach made it clear what 'strategic' means for each of the participants. To better grasp the essence of strategy formation, coachees were suggested to choose and use a metaphor of strategy – that came to mind right at that moment. After it became clear what is strategy in the coachee's perception and what kind of strategic problem she or he wanted to solve, the session smoothly flowed into the second module, focusing on participant's intrinsic values as a basis for strategic decision-making.

The logic behind the second modality, called framing, is based on image theory (Beach and Mitchell, 1987) arguing that personal values are the starting point for setting and achieving the desired goals. Along with other analogies, such as schema, script, mental model, stereotype, etc, the frame is essentially the lens for assessing reality

(Beach and Connolly, 2005). Answering the second module questions, participants assessed strategic problems from the standpoint of their intrinsic values. Due to deep immersion in personal values, strategic challenges looked differently. The third modality was interpretation. At this stage, the final solution to the strategic problem was maturing – through the visualisation of the desired future. The third module consisted of questions focused on stimulating critical thinking about the meaning of strategic problems to be solved. This was the moment of choosing alternatives among possible solutions that have been verified – during the previous module – by coachees' intrinsic values. In turn, the fourth modality involved strategy attainment through articulation of practical steps leading to effective responses to strategic challenges. The fourth module was focused on questions to support strategists in formulating reasonable actions to achieve desired goals. Thus, the structure of coaching sessions on strategy formation consisted of the following basic questions that set the tone for each of the four modalities:

- 1 What strategic problem needs to be solved?
- 2 What are your personal values that influence the solution to this problem?
- 3 What is the meaning of solving this problem?
- 4 How to act to solve this problem?

## 6 Discussion

Data analysis is the interpretation of how strategy formation is reflected in practitioners' speech acts. Considering that the very nature of CDA is primarily interdiscursive and only secondarily linguistic (Fairclough, 2013), the analysis is largely focused on revealing interdiscursivity, which is the key to understanding the practice of strategy formation. Being embedded in strategists' speech acts, signs of interdiscursivity are the consequences of dynamic interactions within strategy discourse. Data is analysed to identify differences and similarities in strategic discursive practices – manifested through speech patterns and linguistic features (Fairclough, 1992a).

### 6.1 *Conceptual and empirical strategic narratives*

Narratives are temporal/causal structures consisting of actual and/or fictional plots and characters that coherently connect the past with the current present and expected future (Fisher, 1989; Beach, 2010). Dynamically lasting in time, narratives build relationships between past events and desired goals. People are used to telling stories to other people and to ourselves, going through personal and other people's experiences. Narratives are complex structures containing emotionally charged memories in the form of various images. Any attempt to translate these structures into the language of everyday communication makes them less profound. Essentially, the role of narratives is to explain and predict the future. The more plausible narratives are, the more effectively they deal with the uncertainty of coming challenges. It is decided to consider strategic narratives that are explanatory and procedural as conceptual – by analogy with paradigmatic narratives proposed by Beach (2010), while strategic narratives based on personal experience are seen as empirical – by analogy with chronicular narratives. Conceptual

strategic narratives and empirical strategic narratives complement each other, but differ in function. Conceptual narratives are as ‘good’ as they can coherently explain the future and provide procedures for dealing with challenges. Empirical narratives are appropriate if they can correctly predict the future. Conceptual narratives complement empirical narratives to increase the plausibility and reliability of the latter.

There is an excerpt from the coaching session with respondent 10 that sheds light on how conceptual and empirical narratives drive individual praxis of strategy formation.

Author (hereafter A): “How to define the topic?”

Respondent (hereafter R) 10: “Maybe like a bit of reflection on my goals and my motives. So, I also struggled later to really analyze and understand if I am reacting good or I am proceeding in a good direction...If it’s far away from accomplishing my goals though...So, ... right now...There’s a big pressure to understand what makes se... [not saying the word to the end] ... because we need to adapt all the time or specifically right now even more... That’s a bit hard to understand what makes more sense, because [illegibly] also cannot predict the future (grinning bitterly) [illegibly] don’t know what will come. So, ... Right now, we are struggling to...understand if (sighing heavily) ... which strategy is the best to follow.”

The above excerpt is not from the first session with respondent 10 – this is a continuation of conversation on strategy formation started earlier. During the session, it becomes clear that the very essence of strategy formation involves answers to questions about goals and motives, that is, what is the desired future and the reasons for achieving it. Apparently, for respondent 10, to form strategy properly means ‘reacting good or proceeding in a good direction’ – in other words, coachee’s strategic choices and actions towards the desired future are expected to be consistent with the coming future. That is, strategising is driven by empirical strategic narratives. Besides, the understanding of what makes sense (conceptual strategic narratives) for the actions taken is of great importance for respondent 10. The need to build a logical/temporal chain to make sense of strategising is rooted in conceptual strategic narratives. Another excerpt from the session with respondent 3 shows how crucial it is to form strategy purposefully (conceptual strategic narratives).

R3: “I feel that it [strategy formation] is driven by the energy of doing something for a purpose. I need to feel that what I do it’s going to be useful or it’s going to be for a purpose. So, that’s why I try to find an application and if I don’t find an application I struggle.”

It is worth noting that most participants tell their strategies as coherent stories – giving meaning to desired accomplishments. Respondent 9 describes expected milestones – such as confirming that the product can be profitable, seeking funding, gathering a team – in detail and consistently. Respondent 1 argues that it is critical for strategy that ‘everything is included’, that is, the big picture is clear, including such elements as people, infrastructure and timing. This approach makes it possible to form strategy based on coherent and, consequently, plausible narratives. Forming strategy, respondent 2 builds a time chain from undergraduate to postgraduate studies, and then to the desire to apply the acquired knowledge and skills in practice. This demonstrates the need to see strategising as logically and temporally connected events. Giving meaning to strategy is a priority for respondent 6: making a choice, which one of the what? why? or how? questions is the most significant for strategy formation, the coachee states that this is the why? question. When asked about the sequence of steps in strategy formation, Respondent 16 argues that



data collection is followed by analysis to ‘get the sense of the information’ (conceptual narratives), and then it is necessary to study ‘examples in the past’ (empirical narratives). Besides, having spent over 25 years in business, respondent 15 states that ‘strategy comes from experience’. Thus, strategy formation as narrative-driven praxis means that practitioners try to predict the future based on empirical strategic narratives, and ‘make sense’ to the future based on conceptual strategic narratives.

## 6.2 Identifying the problem as strategic

The first stage in strategic decision-making is to identify the problem as strategic. This is an excerpt from a session with respondent 4 regarding the designation of a strategic problem to be solved.

A: “What strategic issue is on your mind right now?”

R4: “So you are asking for like a certain relevant and current strategic decision that I am dealing with...that is in relation to my work?”

A: “Absolutely right.”

R4: “We are now... I can’t think of... because we have been working a lot on those challenges. Of course, you’ll never fully solve all strategic challenges. For now, I would think that our strategic challenge is mostly related to our human resources and the future because COVID-19 has changed the world dramatically.”

Below is another excerpt on the same topic with respondent 11 who is a social entrepreneur.

A: “What is the most important strategic issue that needs to be solved?”

R 11: “I think that now for our project the main issue is to make partners. And kind of... how to go out to the market and how to make our name known. I don’t know how strategic these issues are... These are some of the main challenges we have. Perhaps partnership is one of the main challenges.”

A: “Why is this a challenge for you?”

R11: “I guess we don’t have very well defined... what we offer partners.”

A: “What you offer to partners – how this relates to the core of your business?”

R11: “What we offer is basically related to why we are doing this business.”

Reflecting on strategic issues, respondent 4 states that solving strategic problems allows the organisation to ‘move forward’. Respondent 11 reveals that formulating a clear offer to potential partners leads to increased market presence, and this is of strategic importance. ‘Product development’ is the first thing respondent 6 mentions when asked about the most critical strategic issue. Respondents 7, 9 and 12 consider product launching to be strategically significant. Being an engineering company founder, respondent 13 sees overcoming strategic challenges as fulfilment of a personal mission. Most respondents note that the social impact of their businesses is among their strategic concerns. Based on the analysis of sessions with all respondents, it can be argued that such linguistic features as purpose, impact, achievement, self-satisfaction, and product are most closely associated with strategic problems and their solutions.

There is a high interest in revealing how practitioners distinguish strategic and non-strategic issues. Here is what respondent 11 has to say about it.

A: "How do you understand the difference between strategic and non-strategic choices?"

R11: "I don't think I can clearly define the difference. In the end, because I think whatever you do, you have that strategy in your mind that you want to reach this goal. And what I really do basically – in one form or another – leads to that final destination."

Below is another excerpt on the same topic with respondent 4.

A: "What do you think is the difference between strategic and non-strategic decisions?"

R4: "Well. This is an ever relevant question... You sometimes find people struggling with exactly this: 'When am I making a strategic decision and when am I not?'... It's a tough question (smiling) because it's not black and white completely. I mean you are sometimes situated somewhere in a gray area. But if your objectives are clear and you directly tie decisions to objectives to reach some milestones then it becomes clearer."

Thus, it can be concluded that strategic issues are primarily related to the most relevant and significant aspects of organisational development, but does not seem to be a clear criterion for determining what is a strategic problem and what is not.

### *6.3 Prescribed and intuitive strategic discursive practices*

It is not hard to predict that strategists are well aware of how to 'strategise properly'. That is why answering the straight question 'What is strategy?' the vast majority of practitioners refer to prescribed strategic discursive practices, which are – not without the influence of business schools and consulting firms – generally accepted strategic tools and techniques. It may be surprising or not, but almost all respondents literally word for word, except for minor variations, define strategy as planned actions to achieve long-term goals. In addition, coaching sessions revealed another significant attribute of prescribed strategic discursive practices such as distinction between strategising and daily business routine. Being a strategy officer in a large energy company, respondent 4 clearly articulates this approach.

R4: "Strategic project is something that is moving the company forward to its future position and it's something that your day-to-day business doesn't hinge upon. You can do your day-to-day business, but if you want to move the company forward, you need a strategic initiative and you need strategic objectives."

It is worth noting that the distinction between 'appropriate' strategy formation practices and everyday business activities that are not perceived as strategic is clearly stated by the majority of respondents. According to respondent 1, the very essence of 'strategic' implies 'defining specific steps or milestones towards desired goals or solutions', while 'non-strategic' means 'impulsive', that is described as 'take things as they happen and react to things.' However, the subsequent analysis of actual strategising does not confirm that practitioners apply theoretically rigorous strategic tools and techniques to real life situations. On the contrary, following the line of strategic decision-making from strategic problem identification to strategy attainment, practitioners tend to strategise

spontaneously and reactively, relying on their own experience and intuition (Baldacchino et al., 2022). Being embedded in situational responses to strategic challenges, intuitive strategic discursive practices manifest themselves in such speech patterns as focus on humanity, aspiration to be influential, action-oriented approach, readiness for the unexpected, and continuous improvement. Having an academic background, respondent 9 sees strategy formation practices as aimed at proving the correctness of the business concept, that is, checking 'how it works' in reality. Respondent 13 states that strategy is the story he writes. During the session, the coachee compares strategy formation to mountain climbing, describing all possible obstacles and how to overcome them. Emphasising such a significant aspect of strategising as 'learning through journey', Respondent 8 defines strategy as 'a way of thinking together'. Respondent 15 approaches strategy formation practices as preparation for combat. As an entrepreneur with over 30 years of experience, respondent 14 compares strategising to building a house, emphasising the importance of a solid foundation, long-term intentions, and the importance of creating value for others. Respondent 1 states that there are 'different strategies for different goals.' The coachee argues that strategy formation practices are not about planning, but about 'possible reactions.'

It is essential that in many sessions, coachees are observed using specific – inherent in certain approaches to strategising – speech patterns and linguistic features borrowed from prescribed strategic discursive practices, filling them with reactive responses based on the rule of thumb. For instance, as an esports entrepreneur, respondent 6 is strategising in search of ways to increase cash flow, considering the possibility of establishing his own standards that could be recognised by industry regulators. The expectation is to be 'indispensable in the value chain and gain a competitive advantage', while the coachee does not apply specific tools in accordance with prescribed practices, but clearly relies on his previous experience and intuition. Thus, practitioners seem to refer to prescribed strategic discursive practices to validate or even justify their strategising – giving meaning and procedural rigor to their praxis. However, actual strategy formation occurs with the use of intuitive strategic discursive practices.

#### 6.4 Framing

Framing is assessment of strategic problems. The basis for this assessment is strategists' intrinsic values, placed in the context of strategic discursive practices. Common sense says that the proper assessment of the problem is a significant part of the solution. Apparently, there is no universally correct assessment of problems when applying a non-normative approach to decision-making. The following shows how practitioners identify their most significant value drivers.

Respondent 16 claims that his assessment of strategic problems – as part of the subsequent solution – is based on the pursuit of achievement and self-satisfaction. Respondent 13 states that at the heart of his assessment of strategic challenges is his passion for correcting social injustice by providing opportunities for undervalued engineers to earn more. Assessing strategic challenges, respondent 6 finds it valuable to pay back because he has gained a lot from esports and he would like others to have the same opportunity. Respondents 4, 7, 9 and 12 evaluate strategic issues in terms of their ability to impact society by changing the lives of as many people as possible. Responsibility, striving for productivity and excellence are the basis for assessing

strategic challenges for respondent 1. According to respondent 14, the ability to create value for others has the greatest impact on assessing strategic issues. Evaluating strategic problems, respondent 10 notes that it is valuable for her to keep in mind the opportunities to improve people's lives. Freedom, satisfaction and impact drive respondent 8 in assessing strategic challenges. Evaluating strategic problems, respondent 2 takes into account the opportunities to get away from the daily grind and dive into adventure. Respondent 4 states that he is driven by the helper syndrome.

Analysis of the respondents' speech acts shows that strategic problems as such and the evaluative lens come 'in the same package'. That is, the strategic problem identification already implies that there are personal priorities and principles behind it. Subsequent articulation of intrinsic values – answering the questions of the second module of coaching sessions – helps practitioners to bring the hidden to the surface, which in turn makes the next stage of the strategy formation praxis more conscious. The performative aspect of strategising is manifested in the comprehension of personal values through verbalisation.

### *6.5 Deductive argumentation and inductive reasoning*

Beach and Connolly (2005) claim that events hardly occur in isolation: decision-makers usually have a fairly good idea of the causal connection of what is happening in the surrounding world. This understanding forms the context in which the praxis of 'thinking about' solutions to decision problems occurs. Accepting scenarios and stories as part of decision-making, argument theory (Lipshitz, 1993) considers how a certain option is thought both before the decision is made and after: potential actions are evaluated by weighing the arguments for and against. In determining a course of action, decision-makers form coherent stories that are consistent with knowledge related to the current situation and basic assumptions behind it.

The evolution of the art of war in ancient China, shows that the most successful strategies are formed in a combination of both prescribed practices and intuitive ones (Sawyer and Sawyer, 1996). Although systematic, Chinese martial art is based on such principles as flexibility, variability and formlessness. One of the most significant implications of 'unorthodox strategies' is that there are no universal rules that could be applied to all situations. That is, to form successful strategies, it is necessary to take into account both given characteristics, such as the terrain of the battlefield and the type of troops, and variable ones, such as enemy behaviour and the mood of soldiers. The bottom line is that strategists should follow the strategic canons, but at the same time be ready for constant adaptation and even act differently than prescribed if it seems to be reasonable. Below is evidence of how practitioners deal with uncertainty during coaching sessions, drawing upon both prescribed practices (deductive argumentation) and intuitive ones (inductive reasoning).

R10: "Should we try to survive through these difficult times with the product we have? Should we invest because right now it is a bit hard to get new fundings (sighing)? Or... And we...we get more into the sleep mode but not sleep mode because we are full-time working for this...but not expanding the team – getting more developers that we will need right now to improve the product itself. And...yeah...this is a bit of struggle right now to try to understand what makes more sense: to survive and see what we[illegibly]and we have and try to understand if this is already enough or really try to bring it to the next level without even testing it."

As can be seen from the excerpt from the session with respondent 10, a significant part of strategy formation is the search to reduce uncertainty and gain clarity. Below is another example of how respondent 1 went through deductive argumentation and inductive reasoning when strategising at the very beginning of a business.

R1: “The idea arose out of need, out of mess. I asked: what should I do after training? I would like to work on what I have learned and improve it. I had options to go to the lab and teach people or provide services. And I decided not to go to the laboratory, because if people know the whole lineup, then I won’t be needed at the end. I decided to find a way for people to learn something by interacting with me while being ‘permanently pregnant’. I saw a great opportunity to solve a medical problem, that is, to take it to a new level and not be stuck with research alone.”

The analysis of strategists’ speech acts reveals how they use deductive argumentation and inductive reasoning to deal with uncertainty. According to respondent 3, formulating a ‘best case scenario’ – as a result of reducing uncertainty – can be achieved through ‘thinking of a good idea combined with potential possibilities’. Respondent 3 argues that strategic decision-making under a high level of uncertainty – which can be called ‘no exit stage’ – is for her the most emotionally charged part of the strategy formation praxis. She claims that making decisions at this challenging stage helps her move on. Analysing the demand for the product and its value, respondent 16 relies most on intuition, focusing on feedback through subjective indicators of strategy success such as good mood, energy, and readiness for the next step. Making strategic decisions, respondent 6, on the one hand, relies on the rules of the game accepted for the industry, on the other hand, he is strongly motivated to improve other people’s lives and leave a positive mark on history. Respondent 13 views strategic decision as a turning point, after which the story goes differently – that is, at this point the scenario changes. He argues that the reduction of uncertainty – taking into account finances, facts, previous experience in making similar decisions – occurs on a basis in which he believes ‘unconditionally as an axiom’. Thus, deductive argumentation and inductive reasoning deal with uncertainty, allowing practitioners to clarify the situation by modifying their practices of strategising. As part of strategic decision-making, deductive argumentation relies on prescribed strategic practices, while inductive reasoning is related to intuitive strategic practices.

### *6.6 Interpretation of the strategic problem within discursive formations*

As the third stage of strategic decision-making, interpretation gives meaning to strategic problems. Prior to strategy attainment, strategic problem interpretation occurs under the influence of interdiscursivity, which in turn is a consequence of the complex interaction between strategic discursive formations. Signs of interdiscursivity are most clearly manifested in strategy metaphors created by practitioners during coaching sessions. respondent 16 chose strategy metaphor as a compass that ‘always shows the right direction to the desired goals.’ From the coachee’s explanations, it follows that his ‘strategic compass’ orients itself in such magnetic fields as cooperation, dedication, family values, and pride in achievement – these fields are the basis for a complex mix of mental structures (strategic formations) in which the interpretation of strategic problems occurs. For respondent 9, the chosen strategy metaphor is the ‘gate that provides access to potential possibilities’. In this context, strategising – like ‘looking for proof of a business concept’ – is ‘the key to this gate’. The metaphor of the gate and the key to it reveals the

complex interplay between strategic discursive formations. The garden is a strategy metaphor for respondent 10. Considering market conditions and funding as external factors like poorly predictable weather, the coachee gives meaning to strategic issues by prioritising organisational goals – maintaining the garden as a core value – through analogies, linking prescribed and intuitive practices.

Chicken for dinner is a strategy metaphor for respondent 1. In this context, the coachee states that there is little chance of finding a chicken in the woods.

R1: “You should know where to be for the greatest chance of meeting a chicken (laughing) and you should have a tool to get that chicken for dinner. Simply put, if you want to have chicken for dinner, you should know how to catch it.”

In the speech acts of respondent 1, interdiscursivity is revealed as interactions between prescribed practices to know the market and striving to achieve desired goals. Keeping in mind such basic assumption as ‘people should just benefit from it’, the coachee adapts the prescribed practices for setting strategic goals to her personal approach based on intuition. In this case, signs of interdiscursivity are small steps towards desired goals.

R1: “I move from one milestone to another, realizing that most of the time my expectations don’t work out. So, you need to constantly adjust your goals. This usually allows you to determine the milestones as accurately as possible, but in my experience I most often fail, because big steps cannot be performed exactly as I would like to do it.”

Using the metaphor of cooking, respondent 3 argues that everything starts with craving for something, followed by choosing a recipe, selecting ingredients, and then analysing how the recipe could be improved. The coachee explains that she simultaneously follows the cooking procedures (prescribed practices) and at the same time adjusts the cooking praxis to her needs and tastes by customising it. This approach allows her to dive deeper into the strategic problem and give it the required depth of comprehension. Respondent 7 makes sense of the strategic issue through the metaphor of a tailor who takes into account the individual needs of each person in a global context of new technological opportunities. Respondent 8 grasps the meaning of strategic problems through the metaphor of an ambitious young man climbing mountains – this praxis requires both knowledge of the prescribed rules of team work and a passionate pursuit of personal satisfaction. According to respondent 14, strategy metaphor is human life. In this regard, the coachee comprehends the meaning of his strategic problems through reflection on the cycles of life: from birth to the acquisition of knowledge and skills and then to their subsequent application. Unfolding the meaning of strategic problems, respondent 12 uses the metaphor of swimming against the flow, which reveals the basic assumptions of high competition combined with the search for operational efficiency. In addition, interdiscursivity can be observed when respondent 11 gives new meaning to the strategic problem, changing the perspective of looking at the problem from internal to external. Thus, short-term mental constructs (discursive formations) – induced by coaching sessions – constitute strategy discourse in which practitioners interpret strategic problems.

### 6.7 *Strategy attainment through performative praxis*

Taking performative perspective, strategy formation is viewed as finding solutions to strategic problems through linguistic practices. Strategists' speech acts are replete with manifestations of performativity. Respondent 16 states that strategy rules are formed from communication with others. The coachee concludes that when he speaks 'it becomes clearer'. Besides, respondent 3 argues that strategy formation begins with the verbalisation of an idea.

R3: "Get the idea, verbalise the idea, and I'm starting to think that yes it might be possible. I can't manipulate it. It just comes up. And then I improve what came right away, but this is not something that I force. It comes naturally."

Respondent 13 claims that for the first time he formed his strategy – influenced by the books of Drucker, Mintzberg and Porter – simultaneously with launching a business. At that time, the coachee drew a pyramid on an A4 sheet where he placed all his strategic goals, and shared this picture with everyone who asked about his strategy. In case the interlocutors did not understand what 'the essence of this strategy' was, respondent 13, editing the picture during the conversation, explained his strategy to others and actually attained it himself. In addition, respondent 1 states that talking about strategy helps her get a clear picture of her desired future. The coachee claims that while in many cases the idea is clear, not all of its parts are visible, so 'it needs to be worked out to build the whole picture'. Besides, respondent 5 argues that the first step in strategy formation is to 'put all things into writing'.

Although manifestations of performativity can be observed in all modalities of coaching sessions, 'doing things with words' is most clearly seen at the fourth stage of strategic decision-making. This is the strategy attainment stage, when coachees formulate practical steps to achieve their desired goals. According to respondent 8, the strategy attainment praxis is explicitly action-oriented.

R8: "We are sticking more with the action plan rather than with our strategy."

Using undercut – when a formula 1 driver decides to change tires a few laps before the car in front of him in order to overtake a rival later – as a strategy metaphor, respondent 6 finds solutions to his strategic problems precisely at the moment he gropes for the wording of practical steps to achieve desired goals.

R6: "Now I understand that I should change my approach, change my activities. For me, the most important things are to be useful for others, to leave a positive mark on history, and make money. And right now, as a Formula 1 driver, I realise that in order to achieve my strategic goals, I need to overtake not the competition, but myself."

Respondent 10 also attains strategy at the moment of formulating action steps.

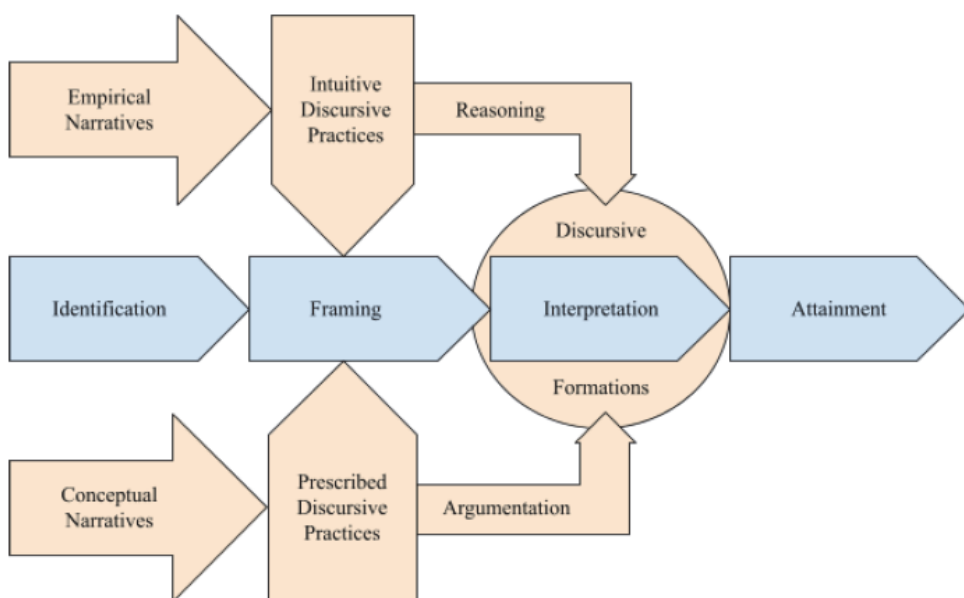
R10: "We continue working with the minimum resources we have – it's clear to us. We are continuing without a bigger team and trying to do everything by ourselves."

Thus, practitioners attain strategy by formulating necessary action steps within strategy discourse.

## 7 Conclusions

Answering the research question, it can be argued that during individual coaching sessions strategy is formed as narrative-driven performative praxis. Theoretical and practical implementations are presented in the form of a non-normative model in Figure 2.

**Figure 2** Strategy formation as narrative-driven performative praxis (see online version for colours)



Essentially, strategy is a plausible story leading to desired goals. Unfolding along the line of strategic decision-making, personal strategic stories are driven by conceptual and intuitive strategic narratives. The ongoing praxis of strategic decision-making – followed by four modalities of coaching sessions – is starting with the strategic problem identification, going through framing and interpretation, and ending up with the strategy attainment. The individual praxis of strategising – being focused on what is valuable (internal) and what is relevant (external) – is structured by strategic discursive practices, both prescribed and intuitive. Applying strategic discursive practices, practitioners assess strategic issues on the basis of their individual values. Deductive argumentation and inductive reasoning are aimed at reducing uncertainty. Strategic problems are interpreted under the influence of interdiscursivity as a result of complex interactions between strategic discursive formations. Signs of interdiscursivity are most clearly seen in strategy metaphors created by practitioners during coaching sessions. The performative dimension of strategising is manifested at the strategy attainment stage – when practitioners formulate the necessary action steps.

The limitations of this study are primarily caused by the choice of data collection techniques, the data itself, and its subsequent analysis. Although practitioners from all over the world – for whom strategising is their daily praxis – were invited to participate in the study, neither their socio-cultural diversity nor differences of organisations they



belong to, were taken into account. In addition, the data analysis is limited not only by the chosen methodology, but also by the author's explicitly biased interpretation of strategy formation. It is also important to note that although practitioners formed their strategies in real settings, they were not completely free to choose their authentic approaches to strategising, being limited by the structure of coaching sessions proposed by the author.

As for the further directions of research, in a narrow sense, it is critically significant to test the constructed model in more empirical studies, as well as to look for opportunities to extend the model application – taking performative dimension of strategy formation – outside of coaching sessions. In a broad sense, it is time to get to the very essence of strategy. The current state of affairs is such that if in any written or spoken text the word 'strategy' is replaced by any of the phrases like 'path to success' or 'a set of coherent actions' or something like that, then in no case the meaning of the text changes. And if this is true, then what is strategy in the modern world? Such a question *muss gestellt werden*.

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# "We Are Brave Electronic Engineers!": Organizational Identity Attainment Through Performative Strategizing

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**Abstract:** The paper seeks to study organizational identity attainment through strategic linguistic practices, understood as performative strategizing. The article focuses on the interaction of organizational identity and strategy by analyzing the evolution of an electronic engineering company from its founding to maturity over eighteen years. Combining action research and grounded theory, the study identifies the features inherent to organizational identity attainment. The author observed strategic linguistic practices in the company, studied archival documents, and delved deeply into strategy formation as a practitioner, interacting directly with strategists to comprehend organizational identity attainment. The research shows that self-fulfillment, effective communication, and readiness for external challenges are the main features of organizational identity attainment through performative strategizing.

**Keywords:** *action research, grounded theory, organizational identity, performative strategizing*



## 1. Introduction

Recently, there has been remarkable research interest in studying the relationship between strategy and organizational identity. A dynamic view of the nature of strategy and identity in their interactions is the most promising direction for research (Langley, Oliver & Rouleau, 2020). Enang, Sminia and Zhang (2021) have analyzed the discrepancies between the temporal orientations of strategy and organizational identity, showing the possibilities to overcome these discrepancies. For the *Special Issue on Exploring the Strategy-Identity Nexus*, seven articles were selected to “discuss the concepts of alignment and fit as central to the organizational identity and strategy literatures” (Ravasi, Tripsas & Langley, 2020, p. 5). The study places particular emphasis on alignment because previous research has shown that strategy and organizational identity do not have a clearly coherent relationship (Rindova, Dalpiaz & Ravasi, 2011; Anthony & Tripsas, 2016). However, looking for a fit between the two phenomena, the authors of the special issue consider strategy quite superficially, claiming that strategy is “what organizations do or intend to do to achieve superior performance” (Ravasi, Tripsas & Langley, 2020, p. 5). This approach leaves without due attention the diversity and even contradictions in strategy research, since strategy, unlike organizational identity, lacks a common understanding. Insufficiently explicit designation of strategy in interaction with organizational identity leads to vague and barely valuable outcomes.

Albert and Whetten (1985) studied organizational identity as a holistic phenomenon that aligns individual identities. It is assumed that organizational identity is something that “already is” and can be described as an entity with attached attributes such as centrality, distinctiveness, and enduring (Albert & Whetten, 1985). At the same time, the alternative approach to organizational identity, revealing how organizational members acquire organizational identity (Chia, 1996), has received less attention, despite viewing organizational identity not as an essence or a thing, but as a flow or a narrative that opens new perspectives for research (Schultz *et al.*, 2012). At the individual level, Mantere and Whittington (2021) unfold the conditions for attaining strategists’ identity, such as self-measurement, self-construction, and self-actualization, calling them tactics within strategic discourse. At the organizational level, identity formation as an ongoing praxis is discussed by many scholars (Glynn, 2000; Scott & Lane, 2000; Sillince & Brown, 2009; Rockwell, 2016). However, the features of organizational identity attainment through a narrowly defined approach to

strategy formation have not been studied. Thus, in terms of the research gap, a detailed study of how organizational identity is attained through performative strategizing is required.

Considering the concept of performativity originally formulated as “doing things with words” (Austin, 1962), it could be argued that performative strategizing involves strategy attainment through linguistic practices and communication (Pälli, 2018; Vásquez *et al.*, 2018). The current research agenda on performativity in relation to strategy is not limited to the original approach, but also includes such aspects of performativity as efficiency, identity, and sociomateriality (Gond *et al.*, 2016; Cabantous, Gond & Wright, 2018; Allard-Poesi & Cabantous, 2021). There is significant research interest in studying performative aspects of strategy formation in relation to organizational identity attainment.

Based on the above, the following research question was developed: What are the features of organizational identity attainment through performative strategizing? The article consists of five chapters. Following the introduction, the second chapter provides an overview of the theoretical framework of the study. The third chapter explains methodological choices and data collection techniques. The results are placed in the context of current research in the fourth chapter. The theoretical and practical implications and limitations of the study are presented in the conclusion.

## 2. Theoretical framework

As a theoretical concept, organizational identity emerged in the academic agenda after two researchers, Stuart Albert and David Whetten, observed the behavior of colleagues who feared layoffs at the University of Illinois in 1979. What happened then showed that “concerns about identity are just as profound as concerns about survival” (Whetten & Godfrey, 1998). Organizational identity is characterized by attributes such as central, distinctive, and enduring (Albert & Whetten, 1985). Centrality is based on the deepest organizational values, which in turn determine the most significant organizational practices. Centrality is what forms the core of how members perceive an organization. Distinctiveness refers to those aspects of organizational identity that members consider as distinguishing their organization from other organizations involved in the same activities. In other words, distinctiveness is a unique mix of significant organizational

characteristics. Enduring means that organizational identity is preserved over time. Although it is generally recognized that nothing in organizational life is constant, there are nevertheless organizational characteristics that exhibit striking similarities over long periods of time. Essentially, the soul of the organization remains the same, although the organization is forced to evolve in a changing environment.

At an early stage of organizational identity research, scholars, without a proper theoretical basis within organizational theory, relied on the concept of identity in related fields. Researchers have viewed organizations through a metaphorical lens as machines or organisms (Morgan, 1986), and then, more recently, as superpersons (Czarniawska-Joerges, 1993). This superperson is someone making decisions—the head of an organization or a group of executives. Like a superperson, the organization is seen as striving for consensus. Moreover, like human beings, organizations are born, go through tough formative years, acquire new theoretical knowledge and practical skills, become old, and then die. The perception of an organization as a living organism or superperson is largely determined by the requirements of interaction with various government and market institutions. The perception of organizations as individuals is reflected in everyday language: we argue that some organizations behave aggressively and unethically, while others behave nicely and abide by the law. But organizations are neither like people nor machines, nor organisms. Czarniawska-Joerges (1992) claims that organizations are sets of collective action.

Exploring the mysterious appeal of organizational identity, Gioia (2008) claimed that the concept is relevant at all organizational levels. Organizational identity resonates with members of organizations as well as researchers. This happens because the comprehension of organizational identity—both at the individual and organizational levels—involves a deep dive into the personal world of organizational members and the fundamental underpinnings of organizations. The praxis of organizational identity attainment has an ontological nature, since reflection on identity means searching for answers to existential questions related to the fundamentals of individuals and organizations. Attributes of organizational identity, such as centrality and distinctiveness, seem to be generally accepted, but enduring appears contradictory. Questioning organizational identity as something immutable, researchers have concentrated on the internal and external factors that lead to identity transformation, as well as those that hinder it. It seems counterintuitive, but historically research has first focused on organizational identity change, and only much later, on the sources and

conditions for organizational identity formation (Gioia *et al.*, 2013). The research agenda has long been enmeshed in discussions of organizational identity transformation, which was undoubtedly theoretically significant, but distracted scholars from more fundamental issues related to the emergence of the phenomenon under study.

There are three paradigms—the linguistic-discursive paradigm, the social actor paradigm, and the social-constructivist paradigm—within which the emergence of organizational identity is studied (Rockwell, 2016). The first of these paradigms considers organizational identity as emerging through linguistic practices that structure reality for members of the organization. The praxis of attaining organizational identity involves articulating, grasping, and adjusting the generated meaning through all available means of communication at all organizational levels. The second and third paradigms view the emergence of organizational identity as a dynamic construct determined by internal factors. In the social actor paradigm, organizational identity is defined by leaders to invite others to adopt a top-down approach. Within this paradigm, organizational identity is seen and understood primarily through the eyes and hearts of leaders. One of the drawbacks of this widely used paradigm is the inevitable gap between how executives and employees perceive the organization. The social-constructivist paradigm seeks to bridge this gap by claiming that it is not only leaders that determine organizational identity. Wertsch (2012) argues that all organizational members form a collective identity, which is strengthened in the organizational space by adding new meanings based on the personal values of all members. Within the social-constructivist paradigm, the emergence of organizational identity represents an ongoing praxis of interpreting organizational events. Thus, the first paradigm draws directly on the linguistic perspective of organizational life, while the second and third include organizational members in the game and consider their roles.

Organizational identity is directed both inside the organization—this is how members of the organization form a shared understanding of what the organization is, and outside—external actors through various communication channels “read” positive or negative manifestations of organizational identity, which can significantly favor or hinder the achievement of the desired organizational goals. Rockwell (2016) found that disruptions to the shared understanding of organizational identity have a profound impact on organizational effectiveness. In this way, a coherent organizational identity is strategically significant. Therefore, organizational identity—at all levels

of analysis—is often studied in relation to organizational strategy (Oliver, 2015). Strategy looks forward to the future, while organizational identity, being the unchanging soul of the organization, inevitably turns to the past events of organizational life. Although the distinct temporal orientation of the two concepts studied is obvious, both strategy and organizational identity share common approaches to finding coherent interactions in organizations, which largely determines efficient decision-making. Each of the concepts strives to find a balance between external challenges and internally determined factors. Besides, both strategy and organizational identity cannot be considered as static phenomena without taking into account their dynamic formation.

Organizational identity as a modern institution has a narrative character (Czarniawska-Joerges, 1994). Being socially constructed, organizations form their identities primarily through linguistic practices. Narrative plays a significant role in strategizing. In a broad sense, strategy formation can be viewed as fiction, because strategy develops narratives about an imaginary future that has not yet arrived, and may never arrive (Barry & Elmes, 1997). In essence, organizational strategy is like a book plot that is attractive and credible—all organizational members believe in their own Harry Potter, as well as the other inhabitants of Hogwarts and the Muggle world. Strategic linguistic practices form dominant narratives that reflect organizational policies, as well as the distribution of power in the organization. There are various genres of strategic narratives based, on the one hand, on the widely accepted tools for strategy formation, and on the other hand, on the gut feeling, manifested through prescribed and intuitive practices for strategic decision-making (Prokushenkov, 2023). Narrative approaches to strategy formation favor strong connections between micro and macro levels in organizations. The narrative fills organizational activities with the proper meaning, sets the right directions for strategic development, and contributes to rethinking of organizational identity (Fenton & Langley, 2011).

Attaining organizational identity through performative strategizing requires collective effort. Within the framework of language-based strategy formation, strategists act as experts performing their linguistic roles, and strategizing is a language game where the rules imply a correct use of strategically significant labels (Mantere, 2013). Strategy triggers organizational practices through performativity (Merkus *et al.*, 2019). In turn, organizational practices are mutually dependent on organizational identity. The interaction between identity and strategy is complex, indirect, and inertial (Ashforth & Meal, 1996). At the individual level, organizational identity coupled



with strategy form a space of opportunities and constraints. This space encourages organizational members to integrate their personal identities into a collective identity. Considered as action at all organizational levels in multidirectional time orientations, organizational identity attainment can be viewed as strategizing. Here are three lines of research on the link between identity and strategy: identity as strategic resource, identity as a framing device and identity as a form of work (Oliver, 2015). Identity as a resource can serve as the basis for competitive advantage. Besides, identity can be viewed as a lens for analyzing the external and internal environment and making strategic decisions. Additionally, identity as a form of strategic work relates closely to the concept of strategy-as-practice.

### 3. Method and data collection

Action research as a method involves active interaction between the researcher and practitioners in real-world settings (Cornish *et al.*, 2023). The methodological choice allows the author to be immersed in the study of strategy formation at all organizational levels. Action research is aimed at transformative changes in the studied phenomena. The chosen method is focused on studying organizational life simultaneously with the implementation of organizational practices using integrative methods (Davison, Martinsons & Malaurent, 2021). Initially, Lewin (1946) assigned a comparative nature to action research, aimed at analyzing the conditions and causes of the emergence and evolution of various forms of social interactions. Torbert (1981) argues that action research seeks to find answers to practical problems with deep involvement of researchers; it is empirical questioning that produces insights through action rather than through external observation. Over the many years of the widespread use of action research, contradictions have arisen in determining the priorities of research, namely, whether more attention should be paid to the actions themselves or to the study of diverse activities as a way of analyzing actions (McNiff & Whitehead, 2005, pp. 3–5). One of the most significant disadvantages of using action research is that this method is often chosen by insiders for whom it is difficult to obtain an outside perspective on the phenomena being studied. An undeniable advantage of action research is the opportunity to gain a fresh research perspective, one free from generally accepted theories.

Coupled with action research, the constructivist grounded theory was applied, suggesting that “the viewer creates the data and ensuing analysis through interaction with the viewed” (Charmaz, 2000, p. 523). Data was not considered as a given reality—on the contrary, comprehension of reality occurred through the interaction of the researcher and the phenomena being studied in a physically and socially determined context. Data analysis in grounded theory involves the researcher’s active participation and is done through coding. Glaser (1978) described coding as a process that involves the researcher going beyond the empirical level and conceptually grouping the data which then becomes theory. Following Glaser (1978; 1992), substantive and then theoretical coding were conducted. Substantive coding included two stages: open and selective coding. During open coding, data was “opened” through a line-by-line analysis by taking notes related to conceptual claims that emerged during the comparative analysis process. At that stage, three core categories of data related to organizational identity attainment were identified: organizational members’ individual experiences, interaction within the organization, and external environment. In the process of selective coding, emerging properties were assigned to one of three core categories and an interim table of key quotes was compiled. Then, theoretical codes were formed from hints signaled by data to get a holistic understanding of the phenomenon under study. Theoretical coding integrated meaningful codes into a theory.

To carry out an inductive longitudinal study, the author used the working materials of a strategic retreat that took place from February 10 to 11, 2012, semi-structured interviews with the company’s founder, archival documents, and observation of the organization’s members. The working materials of the strategic retreat are transcripts of group work by company employees, divided into groups tasked with writing fairy tales about the past, present, and future of the company. Seven interviews were completed with the company’s founder and CEO between March 2021 and August 2022. The structure of interviews was formed on the basis of four questions, each of which was worked out in due depth. The questions touched upon (a) the essence of the strategic problems that the company faces; (b) the influence of prescribed and intuitive narratives (Prokushenkov, 2023) on the possibility of solving these problems; (c) the significance of solving these problems for the organization; and (d) practical steps for implementing the decisions made. Online video interviews were conducted using Skype and recorded with the respondents’ permission and then transcribed. The total duration of the interviews was 9 hours 22 minutes. Five interviews were done with

the company's founder and CEO between September and November 2022, of which the first four interviews were completed online, and the last one was held in person. Video interviews were conducted using Skype and recorded with the respondent's permission and then transcribed. The face-to-face interview was tape-recorded with the respondent's permission and then transcribed. The total duration of the interviews was 6 hours 48 minutes. The archival documents cover the entire history of the company's evolution from its founding in 2004 to maturity in 2022. There are corporate statistics, PowerPoint presentations, press articles, and a website—25 documents in total. Besides, the author observed employees and interacted with top managers in the company's offices in Minsk, Belarus in May–June 2014, as well as in Vilnius, Lithuania in November 2022.

## 4. Results and discussion

The initial impetus for the start of the company in 2004 was the founder's insight into the striking gap between the high qualifications of electronic engineers from Eastern Europe and their undervaluation in the global context. At its core, the company grew out of a deeply personal experience of the inferiority of knowledgeable and capable engineers. The company was founded to "correct the injustice" that was in the unfairly low assessment of valuable professionals, one of whom was the founder. It turned out that the company was conceived as the best place for electronic engineers—this maxim drove the company's development from inception to maturity. According to the founder, the metaphor of the company is a living organism, "namely an octopus, which has a small head, an awkward body and long tentacles." The main characteristics of such an organism are survivability due to the decentralization of decision-making and distributed competencies. In the process of evolution, the company developed "from a family to a micro-holding, and then to a divisional structure." In the first eight years of the company's existence, strategizing was carried out solely by the founder in an authoritarian style until, in 2012, there was "a mutiny on board," which forced the founder to invite employees to jointly form strategy during the first strategic session in the company's history.

During the strategic session in February 2012, employees, divided into four groups, participated in strategic linguistic practices, which included writing fairy tales about the past, present, and future of the company. Narrative



strategizing gave birth to metaphorical stories of collective authorship about three donkeys, three little pigs, three heroes and a king. The donkeys were "scary and grimy," but when they heard the call of a "beautiful white horse to become big and strong," they responded to the call and set off on a journey full of trials to find their strength. Then, the misadventures of the donkeys on their dangerous path are described. The tale ends with hope for the eventual construction of a bright corporate future—a symbolic bridge, over which the donkeys can reach their goals. In the tale of the three little pigs, the protagonists set out to build something big, meaningful, and lasting, but were unable to reconcile their intentions. As a result, one pig could not cope with his complex and expensive project; the second pig, who focused on cheap straw houses, was forced to leave the market due to competitors from Asia; and the third pig, who decided to build a ship instead of a house, faced failure when his ship froze in the ice as soon as winter came. In the third tale, a ruler set ambitious goals for the executives playing the roles of heroes but did not clearly indicate how to achieve these goals. As a result, the heroes got lost in their ways. The tale of the tsar tells the story of the discrepancy between the leader's intentions and the employees' capabilities, as well as the company's resources.

Viewing performative strategizing through storytelling as a language game (Mantere, 2013), where not only the roles of the participants are significant, but also the manner in which they use strategically significant concepts, provides a reliable basis for interpreting corporate narratives. It could be argued that corporate fairy tales have temporal, individual, as well as organizational dimensions. As for the temporal dimension, participants clearly identify events in the past by giving these events an explicit assessment, then describe the ongoing present and sketch out an uncertain future. Fairy tales are intensely emotionally charged: there are complexly intertwined dreams of a bright future, hopes, pride in achievements, joy, excitement and, at the same time, confusion, disorientation, dissatisfaction, and even aggression. Analyzing the world described in corporate fairy tales, one could discern motifs of "the big house" as a symbol of power and influence, ambitious goals, innovation, and creativity. In this way, plausible stories shape corporate fiction (Barry & Elmes, 1997). Besides, strategic linguistic practices integrate micro and macro levels in the multi-level space of company strategic work where narratives are understood as a way of giving meaning to the practice of attaining organizational identity (Fenton & Langley, 2011).

The 2012 crisis led to the company “becoming loose.” According to the founder, one of the reasons for the crisis was that the engineers “felt like kings”—which was inherent at the company’s inception—while other employees vehemently protested against such inequality. During a strategic session, which came about as a consequence of the collision of the prescribed organizational identity and the spontaneous reaction of strategists, claims of multiple identities were made through personal self-representation (Sillince & Brown, 2009). This was a precondition for breaking the homogeneity of organizational identity, which had a significant impact on strategic decision-making (Brinkerink *et al.*, 2020) and, unexpectedly, influenced the strengthening of competitive advantages (Sillince, 2006). Glynn (2000) argues that the construction of organizational identity is related to strategic capabilities and resources, which is clearly seen in all the most significant crises that the company has experienced over 18 years. Two years after its founding, the company experienced its first growth crisis, but at the same time reached the understanding that “now we can do business.” The loss of a massive portion of clients in 2010 tested the accuracy of the chosen strategy and the viability of the organizational identity. In 2011, new partners joined the team, which then brought the company to the brink of the abyss, primarily due to an organizational identity crisis.

The question “who we as an organization” began to be discussed for the first time by all members of the organization after the company overcame the 2012 crisis. Up to this point, the founder had single-handedly outlined the prescribed values and principles, as well as the desired organizational identity. The main claim was akin to youthful maximalism and sounded as follows: “We are brave electronic engineers who can handle any task!” On the one hand, such an approach created drama, which is necessary for the development of the plot. Using this, the author claims to understand the development of the company, taking a linguistic perspective to be in tune with the entire study. On the other hand, the personality of a revolutionary type of founder, who created a company to challenge the status quo in the electronics industry, is not inclined to adaptive and flexible behavior, even despite changes in the competitive environment and a decrease in the company’s efficiency (Zuzul & Tripsas, 2020). As a result, the company demonstrated inertial behavior, which was due to the work of the mechanism for confirming the personal identity of the founder, which in turn influenced the organizational identity. Inertial processes largely determined the subsequent crises, which the company went through after 2012. It is critical to note that each crisis was strongly associated with reconsidering

organizational identity. In the crisis of 2015, the founder stepped away from active involvement in the daily business routine. In that year, the company was forced to fire half of the employees, debugging business processes during the transition to regular management—one that would be free from the founder's voluntarism. Then, to overcome the 2017 crisis, caused by changing customer needs, the founder returned to managing the company, but in a new role—as a mentor and coach.

Discussing the interaction of strategy and organizational identity, the founder argues that organizational identity comes first, being a necessary condition for achieving organizational goals, while strategy comes second, as a sufficient condition for organizational success. This approach contradicts the claim that "strategy is meaningfully framed by identity, while strategy serves to enact identity" (Schultz & Hernes, 2020). When analyzing the relationship between strategy and organizational identity, it is critical to clearly articulate the basic assumptions underlying the latter. The first assumption is that organizations have a default identity that has clearly distinguishable characteristics—and if these characteristics are not present, then it turns out that there is no organizational identity. The second assumption is formulated by Whetten (2006) as an attempt to form a stronger version of Albert and Whetten (1985): the claim is that organizational identity is treated as an analogue of individual identity. The third assumption is that organizational identity is unchanged from the birth to the death of the organization (Kjærgaard, 2009). The fourth assumption is that organizational identity is something special and clearly different from other concepts such as organizational culture or image (Ravasi & Canato, 2013; Hatch, Schultz & Skov, 2015). The apparent vulnerability of the above basic assumptions gives rise to an ongoing crisis in the concept of organizational identity (Pratt, 2003). Consequently, attempts to analyze the strategy-identity nexus (Ravasi, Tripsas & Langley, 2020) must take into account both the lack of agreement on what strategy is and the weak foundations of the organizational identity concept.

Substantive coding outcomes are presented in Table 1

**Table 1.** Substantive coding outcomes.

Illustrative quotations	Conceptual claims	Core categories
<p>We respect clients and colleagues, support self-criticism, openness, and bold decisions. We recognize every employee's right to make mistakes in innovative actions.</p> <p>Once upon a time there lived 3 donkeys: Om, Am and Um. They dreamed of being big and strong. One day a beautiful snow-white horse came to them and asked: Do you want to be like me, scary grimy donkeys? Yes, the donkeys said in unison. Then go. Behind the 9 mountains there is a country of Hardware, there is horse-grass. If you eat this herb, you will become big and strong like me.</p> <p>The donkey Um went his own way but came to a swamp along the way. He walked right through the swamp, catching algae and snags. In the distance one could see a forest and a clearing in which forest animals frolicked. The donkey was proud that he was walking through the swamp and all the forest animals were surprised at how patient he was, that he was walking this way.</p>	<p>Psychological safety</p> <p>Dream of being big and strong</p> <p>Overcoming difficulties and being proud of achievements</p>	<p>Organizational members' personal experiences</p>
<p>We create core value for the client in teams through mutual exchange of ideas, joint efforts, support, and shared responsibility, and do not refuse to help others.</p> <p>The donkeys walked for a long time and found themselves on 3 rocks, between which there was a canyon. The fog dropped and they finally saw each other. There was a tree growing on every rock. The donkeys, having shouted at each other, agreed to knock down the trees so that they would form a stable bridge. Having crossed the canyon, they moved on.</p> <p>Naf-Naf was building the house. But his strength was running out, his health was deteriorating, his blood pressure was skyrocketing. And Naf-Naf realized that without like-minded people he would not be able to build a house.</p> <p>One day, all the friends came together, heatedly discussed the current situation, and actively decided on how to live further.</p> <p>Tsar the Father lost his patience and slammed his fist! And he spoke loudly: When will I see these interpersonal proceedings? You are united in spirit, united in purpose, you must come together, complement, unite the households, and create a miracle! I can only give you a hint and advice: we will build a catapult, all together, in order to expand our gates and let a miracle in... and lay out a path and a road into foreign principalities!</p>	<p>Exchange of ideas and joint efforts</p> <p>Striving for effective communication</p> <p>Desire to find like-minded people</p> <p>Desire to discuss problems together</p> <p>Coming together to achieve common goals</p>	<p>Interactions within the organization</p>

Illustrative quotations	Conceptual claims	Core categories
<p>We have evolved only in projects with high challenges.</p> <p>The king gathered his squad and ordered to make sure that the kingdom would become famous throughout the world! Three heroes volunteered for this unknown journey. The goals are noble, but no one knows how to fulfill them.</p> <p>Alyosha is saddened, he understands, but does not know how to achieve this noble goal.</p> <p>Dobrynya became sad. For a long time, he thought about what to bring to the new lands... Everything that is in our kingdom is indecent on foreign lands... In thought, he set off on a journey to look at foreign lands and their way of life.</p> <p>Boyar 1: Of course, we can, Tsar the Father, it is a good thing (a malicious smile with anticipation of easy money), but I would like to understand what they want from us, what task is set before us, what resources can I count on?</p>	<p>Challenges</p> <p>A leader's ambitions to meet challenges in the outside world</p> <p>Confusion</p> <p>Uncertainty</p> <p>Lack of confidence</p>	<p>External environment</p>

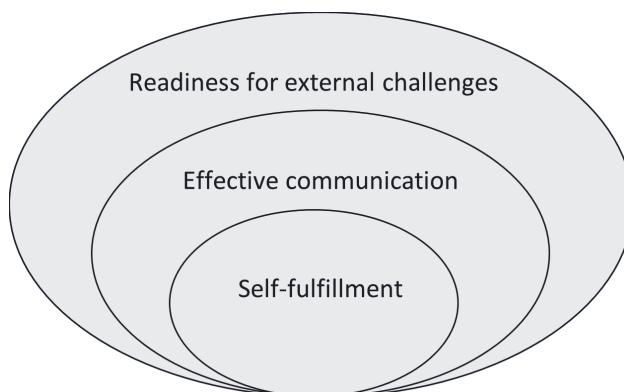
By placing the findings of the study into the current research agenda, it could be stated that the organizational identity attainment in the company under study occurred within the framework of an attribute-based claim (Cloutier & Ravasi, 2019). Being “brave electronic engineers” is a clearly articulated manifestation of the organizational soul, which is something that has remained unchanged throughout the company’s history from inception to global success. Comparing organizational identity to soul may be appropriate because organizational identity, like soul, does not seem to be a top priority for practitioners—as if it were impossible to live without it. The opposite is true: strategy, finance, and market positioning are of decisive importance for board members and executives, while organizational identity is remembered, like the soul, only in the most extreme cases. Revealing the features of organizational identity attainment, such as self-fulfillment, effective communication, and readiness for external challenges through performative strategizing, can be considered as part of identity work (Oliver, 2015). By analyzing the relationship between strategy and organizational identity, both phenomena could be seen not as two separate entities, but as mutually reinforcing narratives.

## 5. Conclusion

To answer the research question, it could be argued that the features of organizational identity attainment through performative strategizing are manifested at three interconnected levels. The first level is associated with the individual experiences of the organization's members, their motivation and efforts, satisfaction with personal effectiveness, and achieved results. The first feature of organizational identity attainment is self-fulfillment. The second (meso-) level relates to the interactions between organizational members. This level involves the active participation of individuals in implementing their theoretical knowledge and practical skills to achieve organizational goals. The second feature of organizational identity attainment is effective communication, which allows members to align their personal values and intentions with the organization's strategic goals. The third level relates to the environment outside the organization. The readiness for external challenges is the third feature of attaining organizational identity through performative strategizing.

The features of organizational identity attainment through performative strategizing at three levels are presented in Figure 1.

**Figure 1.** The features of organizational identity attainment through performative strategizing at three levels.



The theoretical and empirical limitations of the study are determined by the nature of the phenomena studied in the context of the individual psychological reality of strategists, as well as the choice of data collection methods, the data themselves, and their subsequent analysis. The



methodological choices made by the author, along with the explicitly stated approaches to strategizing, led to significant limitations of the study. The study did not take into account the social status, cultural attitudes of the strategists, or their position in the organization. Although practitioners formed strategies in real-life settings, they were obviously limited to apply their authentic approaches to strategizing. It is also important to note that the study was conducted within an entrepreneurial organization, which resulted in additional limitations.

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