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DIFFERENTIATED WORKFORCE ON STRATEGY IMPLEMENTATION WITHIN THE INSURANCE INDUSTRY: A STRATEGY AS PRACTICE APPROACH

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ABSTRACT

DIFFERENTIATED WORKFORCE ON STRATEGY IMPLEMENTATION WITHIN THE INSURANCE INDUSTRY: A STRATEGY-AS-PRACTICE APPROACH.

Within the field of strategic management research, the formulation of strategy has received considerable attention while strategy formulation has been overlooked. Although successful strategy implementation is the responsibility of all stakeholders in an organisation, most empirical research focuses on top and middle management. Consequently, there is limited knowledge regarding strategy practitioners at other levels of the organisation, and, in particular, little is known about the roles of the differentiated workforce in strategy implementation work in a developing country like South Africa. Furthermore, what people "do" when they formulate and implement strategy, needs further investigation. This study, therefore, researches the problem of strategy implementation by focusing on two companies in the insurance industry in South Africa. It also analyses the extant literature, and investigates the roles of the differentiated workforce, paying attention to their daily micro-practices which have a far-reaching impact on organisational competitiveness. The current literature also omits extensive discussion on the tools, enablers, and constraints of the differentiated workforce in implementing business strategy. The study therefore takes cognisance of these in answering the research question: What practices are utilised in strategy implementation within the insurance environment in South Africa?

To address this research question, the researcher conducted a cross sectional qualitative study by following the strategy-as-practice (SAP) approach, and built a rich database, obtained through interviews of 16 participants at two insurance organisations. Following a process of thematic analysis, data were organised, categorised, interpreted, identified, synthesised and generalised, and the preparation of data for the coding process was in accordance with Saldana's (2009) coding manual. NVivo11, a Computer Assisted Qualitative Data Analysis Software (CAQDAS), was used for more in- depth data analysis. The data revealed that strategy formulation and implementation are dispersed throughout the entire organisation, and that organisational context may affect the differentiated workforce's strategy implementation through particular barriers and challenges. The data also show that the roles of the differentiated workforce serve as a bridge between the various strata, and provide a meaning-making platform for the entire organisation. Importantly, given the high rate of strategy implementation failures, a practical implication of this study is to help management optimise their structure, processes, practices, and strategy implementation tasks, in order to enhance organisation's performance.

The findings of the present study represent an incremental and meaningful contribution to the existing literature on SAP by creating a deeper understanding of the significance of the differentiated workforce as practitioners to delivering and driving strategy implementation that contribute to organisational competitiveness and survival. In particular, the study also provides practical implications that could assist TMT in adopting strategies that could capitalise on the differentiated workforces' strategy making and implementation competencies and capabilities that currently are under-utilised and overlooked.

The limitations and recommentations of the study provide a useful guide for future research considerations.

DECLARATION

I, Vincent Barney Mothuloe, declare that:

The research reported in this thesis, except where otherwise indicated, is my original work. This thesis has not been submitted for any degree or examination at any other university.

This thesis does not contain other person' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons.

This thesis does not contain other persons' writing, unless specifically acknowledged as being sourced from other researchers. Where other written sources have been quoted, then:

- Their words have been re-written but the general information attributed to them has been referenced:
- Where their exact words have been used, their work has been placed inside quotation marks, and cited.

This thesis does not contain text, graphics or tables copied from the internet, unless specifically acknowledged, and the source being detailed in the study and is then referenced.

.....

Signed

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This has been a life changing journey of learning, discovery and personal development. This journey would have been impossible without the contributions from many individuals and organisations. In particular I would like to thank the following:

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This thesis is dedicated to my heavenly Father for giving me strength, guidance and mercy.

DEFINITION OF TERMS

The following conceptual descriptions will serve as definition of operational terms for discussion in this study;

Barriers to implementation

Obstacles or hurdles that impede the workforce from successfully implementing strategy (Malek, 2008; Jooste & Fourie, 2009).

Differentiated workforce

Simply put, the differentiated workforce are the key employees in key jobs that result in achieving organisational goals. "Involves disproportionate investments where you can expect disproportionate returns, that is, those specific people within jobs that can help create strategic success" (Becker et al., 2009).

Implementation drivers

Also referred to as enablers to implementation, it involves the activities and inputs that assist and encourage practitioners to accomplish implementation of business strategies (Ehlers & Lazenby, 2019).

Implementation processes

These are the course of action and efforts that practitioners follow to execute their work tasks.

Practices

"The various procedures, tools and norms of the work of strategy, from analytical frameworks for instance Porter's Five Forces to strategic planning routines, e.g., strategy workshops" (Vaara & Whittington, 2012).

Practitioners

These are the actors of strategising, including managers at all levels, the consultants, the board of directors and all those seeking to influence and are involved in the strategy-making (Whittington, 2006).

Praxis

Activity including the strategising work. All the presenting, meeting, communicating, writing and consulting needed to construct and implement strategy is part of this work. Basically, "all the various activities involved in the deliberate formulation and implementation of strategy" (Whittington, 2006:619).

Strategy

Strategy is seen by SAP scholars as an activity in which people take full responsibility through their actions and not only as an attribute of an organisation, (Carter, Clegg & Kornberger, 2008).

Strategy implementation

Hence, the process of putting a series of interactive activities that are done to accomplish organisational goal is defined as strategy implementation (Ikavalko, 2005).

Strategy-as-practice (SAP)

The way in which organisational practitioners mutually interact with the physical and the social contextual features in their daily work that constitute practice. (Jarzabkowski (2004; Whittington, 1996).

Strategising

Strategising is defined as "the meeting, the taking, the form-filling and the number-crunching by which strategy actually gets formulated and implemented" (Whittington, 1996:732).

Strategy formulation

The series of activities through which an organisation creates its business plans. This overall plan serves as a guide to attain objectives through environmental scrutiny, determining the mission and the vision, objectives setting and strategy definition (Mintzberg et al., 2009; Thompson & Strickland, 2001; Lynch, 2006).

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1. INTRODUCTION, STATEMENT OF RESEARCH PROBLEM, AND OBJECTIVES OF THE STUDY

1.1. INTRODUCTION

Developing and implementing strategies, as identified by Davis (2013), are demanding management responsibilities and tasks which organisations must accomplish through the workforce. Indeed, the literature indicates that implementing strategies is a serious and urgent task afflicted with high levels of problems (Hrebiniak, 2006; Neilson, Martin & Powers, 2008), and Johnson (2004) records that up to 66% of corporate strategies are never implemented. This is corroborated by Kaplan and Norton (2006) who indicate that between 70% - 90% of organisations are plagued with failure in the implementing of strategies. In particular, strategy implementation is the most obscure and challenging stage in the strategic management process (Al-Ghamdi, 1998; David, 2012).

With this in mind it is notable that, within the literature on strategic management, strategy formulation is still the most researched area with less attention paid to strategy implementation (Al-Ghamdi, 1998; Bigler, 2001; Hrebiniak, 2006). While the concept of strategy implementation might seem simple, many executives can attest that transforming strategy into action is one of the most daunting managerial responsibilities. Overall, the research concludes that implementation generally falls short of expectations, and is affected by complex challenges (Neilson et al., 2008; Nutt, cited in Chimhanzi, 2004; Ogden & Fixen, 2014).

To secure successful strategy making and implementation, strategic management processes include varied management activities which have been articulated inconsistently in the literature. Conflicting views within the strategic management discipline have been presented, not only in textbooks and by scholars, but also within organisations by management and the workforce (Hambrick, 2004; Nag, Hambrick & Chen, 2007).

According to Whittington (2003), many managerial tasks may be emergent, and not routine, thus compelling managers to apply analytic, systematic and formal processes. Jarzabkowski and Whittington (2008) propose an empirical investigation involving complex strategy creation and implementation in practice as a possible and useful solution to untangle the complex reality of modern business.

In other words, exploring the core “bowel” of strategy creation and implementation has increasingly become the main area of interest for strategy researchers. According to Chia and MacKay (2007), there has been a shift to a closer investigation of actions and micro-processes, a shift that began,

arguably, with the work of Pettigrew (1985) and Johnson (1987) who were the early strategy process pioneers, giving rise to a new paradigm. Supporting this view, the seminal work of Johnson, Melin and Whittington (2003) and Jarzabkowski (2004) articulate the research priorities of a strategy-as-practice (SAP) perspective. In order to comprehend the complexity of strategy (how people strategise), these scholars advocate SAP as a research priority focusing on a "micro-activities-based" perspective to gain insight into how strategy is constructed and executed by managers (and others). This change in direction will assist executives and researchers to have a much clearer understanding on what is actually happening within organisations (Oakes, Townley & Cooper, 1998; Levy, Alvesson & Wollmott, 2003) and the micro-practices of strategy-making and strategy implementation (Whittington, 2002, 2006; Regner, 2003; Jarzabkowski, 2004, 2005).

SAP looks at what takes place in strategy planning and formulation and the tasks and activities associated with strategy and implementation as an alternative approach to mainstream economic strategy research. Inevitably, therefore, SAP research examines the "black box", the work of strategy that has guided empirical research in the discipline of strategic management (Mintzberg & Waters, 1985; Pettigrew, 1973). By plumbing the depths of what goes on in the doing of strategy, SAP "practice" as a special concept, permits experts to intimately engage and talk with practitioners (Brown & Thompson, 2013; Golsorkhi, Rouleau, Seidl & Vaara, 2015, Whittington, 2014).

Strategy, according to the SAP approach, is not something that an organisation has, but something that its members do (Jarzabkowski, 2004). In corroborating this view, Johnson, Langley, Melin and Whittington (2007) also call for empirical work to be refocused explicitly on human activity, and speak of strategy implementation as the doing of strategy. The contextualisation of these micro-actions, even though it is only implicitly addressed, is a significant part of the SAP view (Whittington, 2006). Importantly, actors from the various social institutions of which they are members draw upon the socially, regularly described customs of implementing strategy. Hence actors are not acting alone. In sum, the wider social and organisational context is intrinsic to and an explication of micro-phenomena. The basic assumption of SAP scholarship, according to scholars like Seidl (2007), and Wilson and Jarzabkowski (2004), is that materiality and tools, technologies and discourses are created via the social infrastructure in which micro-actions are nurtured and developed, and have macro, institutionalised properties. Importantly, within and between contexts, these micro-actions serve as a bridge that allows their conveyance, while also being accepted by and modified directly into the macro-contexts. The SAP approach, as social practice, stresses a clear manifestation of the relation between macro and micro approaches on strategy implementation (Jarzabkowski, 2004; Whittington, 2006).

How does the daily mundane behaviour by practitioners in organisations create strategic choices and consequences during strategy implementation? This study, within the SAP framework, attempts to answer this question. According to Johnson and Bowman (1999), the call to humanise strategy implementation research, individuals and their interactions within groups should be the new focus of strategy research with an interest in activities and routine processes. Strategy research has been about the "know what" but the recent emphasis on strategy making and implementation in research is about "know how", "know when", "know where" (Garut, 1997, p. 81). All individuals at different levels in organisations can be investigated according to a micro- strategising and SAP research focus during strategy implementation.

The current study will take a differentiated workforce approach on strategy implementation practice by evaluating the strategy-making practices of the workforce in critical and strategic "A" positions. "A" positions, according to Becker, Huselid and Betty (2009), are the people defined mainly by their wide range in performance levels and their impact on strategy implementation. In line with this view, Jack Welch, former General Electric CEO, asserts that holding the workforce accountable for strategy implementation is imperative for any organisation's success (Becker et al., 2009).

The initial literature review established the lack of empirical research on strategy implementation in South Africa and this indicated that there is a need for more research from a practice perspective in the developing economy like South Africa. This study responded to calls for research on micro-strategising (Jarzabkowski, 2005; Jarzabkowski & Whittington, 2008) In addition, Whittington (2003) argues for more insights into how the work of strategy creation is organised. To this end, this study looked at the daily mundane activities of the differentiated workforce do strategy within the insurance organisation. Locally institutionalised practices which are rooted in the organisational culture can influence the practical relevance of business research. By undertaking a SAP research, a richer understanding of what occurs in the realm of strategy implementation may be seen through the interactions and actions of the differentiated workforce in the broader organisational context. By so doing, it is hoped that this study will contribute to contemporary strategic management research (Jarzabkowski, 2005; Jarzabkowski &Whittington, 2008).

1.1.1. Conceptual framework of the study

The unique context of this research is the impact made by the differentiated workforce as a key component of implementation of strategy in the insurance business context in South Africa. The research examines the construct of workforce differentiation, comprising the strategic jobs and strategic capabilities, and their strategy-making and strategy implementation practices in a South

African context. Similar studies have been conducted by Davis (2013) and Jansen Van Rensburg (2016) in South Africa. Whilst Davis evaluates how strategy is put into practice by individual middle managers in a university context, and Jansen Van Rensburg explores how senior managers execute strategy in the DERIs (Defence Evaluation and Research Institutes), the current study investigates the ways in which the differentiated workforce implements strategy into practice within an insurance business organisational context.

More importantly, organisations need to develop superior strategies to be agile and adaptable to rapid change, and to be competitive in the current business environment. For an organisation to achieve organisational objectives and operational activities, to exceed customer expectations, and to become more effective, Koch (2006) highlights the role of strategic management in influencing strategy implementation. That is, Koch confirms that what is important are management's decisions and actions, and the processes and choices they make to realise and execute the defined strategies. Thompson and Strickland (2001) refer to finding a "fit" between what is required to execute business strategy and the flow of the business operations, and the work of Mintzberg (1985) supports the view that there is more to the process than merely deliberate strategy. Process scholars view strategy making as dynamic, rarely conforming to rational decisions (Mintzberg & Waters, 1985; Mintzberg, 1990; Sminia, 2009). According to Sminia (2009), strategic management concerns a wide range of individuals plus organisational and external phenomena that are influenced by the actions and activities led by management, and these, according to Valmra, Metsla, Rannus and Rillo (2006) impact on the particular practices and processes affecting the business operations.

This study locates the practitioner in the strategic management process within the insurance business environment in South Africa. The extant literature indicates that strategy implementation in South Africa is under-researched (Fourie, 2007; Leslie, 2008; Smith, 2011). While the literature has emphasised the roles of top and middle managers, and has been widely researched, the opposite is true for activities of the other actors, in particular the differentiated workforce and how it utilises practices and processes in strategy implementation (Miller, Hickson & Wilson, 2008; Hambrick, 2007; MacKay & Chia, 2013). It is clear, therefore, that from a practice and process view within the South African context, there is a need for further research. The high failure rate of implementation, according to Jooste and Fourie (2009), indicates that strategy implementation in organisations is plagued by many problems. Although there is general agreement in the field that these failures occur during the implementation stage, there is still little research attempting to establish this association, despite the abundant work on strategy formulation and organisational development (Yukl & Lepsinger, 2007; Jazbowkowski & Spee, 2009; Malek, 2008; Markiewicz, 2013; Ogden & Fixsen,

2014).

In sum, multiple actors in organisations carry out and are the owners of the strategy process and it is important therefore for both practitioners and researchers to be fully insightful about how to achieve strategy implementation. The research question asks: who are the people involved, "by whom", and what was employed in the strategy implementation process. The objective of the research is to arrive at a more compelling solution for the workforce and for all levels of management in organisations. This research explores a gap in the literature on the ways in which the roles of the differentiated workforce are crucial to strategy implementation (Becker, Huselid & Beatty, 2009; Welch, 2005) and it attempts to do so by focusing on the actors/doers using a strategy-as-practice approach.

By combining strategy with social science, SAP provides an opportunity to understand strategy implementation differently (Giddens, 1984; Bourdieu, 1977). By committing to a SAP approach, a clear view of strategy implementation can be investigated through the interactions and actions of many practitioners within the broader organisational context.

1.1.2. Concept of Strategy-as-Practice

According to Whittington (2001) the notion of strategy suggests that the diverse stakeholders constituting an organisation can be united around a common purpose in pursuit of a coherent organisational goal. When such a common purpose is in place it follows that organisations understand their joint responsibilities. Thus, Whittington's analysis that pursuing a united organisational goal that can be captured as process is useful because it takes into account that strategy is something that members do. We have to ponder on the kinds of answers that are likely to arise from the varied views on strategy process and how these are characterised. This study attempts to respond to these challenges on strategy implementation in the constantly changing modern business environment.

Because practice-based analyses of organisations in management disciplines bring clarity and insight into how predominant organisational and societal practices are enabled and hindered, there has been a recent and growing interest in this field of inquiry (Feldman & Orlikowski, 2011). The central feature underlying the practice approach is that strategy implementation is dependent on organisational and other practices. Importantly, these practices on the whole influence the process and outcome of resulting strategies. The genesis of organisational strategies, according to Vaara and Whittington (2012), is the outcome of strategy creation, which is an overall term that explains the many complex actions by all stakeholders in the organisation. Essentially, this comprises strategising in the form of firstly, deliberate formulation of strategy as normally generated by management,

second, all the actions which result in the emergence of organisational strategies, and, lastly, all the work about strategy implementation, conscious or not.

Regarding competitive advantage, this study argues that research in practice of the kind that impacts on the actions and practices of practitioners is required in strategy implementation. Endless demands and challenges in the form of complexity, fierce competition, and new business opportunities have motivated organisations to devise effective strategies to cope with unforeseen events and unpredictable discontinuities in the rapidly changing modern business environments in which they operate (Ambrosini, Brown & Collier 2009). More research in practice that is pertinent in advancing our understanding of how strategy implementation influences and moulds the actions and activities of actors is warranted. The dynamic capabilities of an organisation, that is, the ability to modify, restructure and change resources, are crucial to its success. According to Barley and Kunda (2001) conventional approaches to analysing work practices are dated because transformed workplace activities no longer match the descriptions of these outmoded approaches.

According to Vaara and Whittington (2012), by undertaking this dominant research view, SAP has the potential to clarify how the established organisational and social practices enable and constrain strategy making and implementation. In fact, this approach allows scholars to evaluate how different contextual parts influence knowledge and how competence evolves out of reasonable possible action. In the wider social context, and by examining the people involved as they develop and implement strategy, what arises as strategy can be clarified. Hence SAP adds knowledge to our understanding of the dynamic capabilities of organisations.

Furthermore (e.g., Huselid, Becker & Beatty, 2005), it is not only management which acts strategically, but also the differentiated workforce. This perspective is consistent with SAP scholarship, (e.g., Wooldridge et al., 2008; Huy, 2011) which holds that within an organisation the entire workforce is involved in the strategy generation and execution process (Whittington, 1996). Previously, Turner (1994) asserted that the notion “practice” implies something teachable, transmittable, reproducible and transferable. Jarzabkowski (2000), building on the work of Turner, indicates that the following three main connotations are suggested when the term “practice” is considered:

- practice suggests action, and implies that competence can be gained through repetition (used here as a verb suggesting that strategy is an activity); strategy is knowledge that accrues;
- it connotes starting and going into a particular role; and
- it means in actual, real life.

As opposed to, for instance, a strategy-as-planning approach, which could be understood as a much more rational narrative that is different from practice, a study of practices consists of daily life activities. Researching practices as rooted in the organisational culture could impact on the practical significance of business research (Jarzabkowski, 2000). Practice, according to Vaara and Whittington (2012), means something more than practical as it relates strategy research to established theoretical and empirical foundations rooted in other disciplines.

The present study reflects the implied knowledge-informing strategy practices and processes including the micro-behaviours in which strategy is located as well as the practices that have been learned over the years (e.g., training, meetings, reporting, networking, etc.) and which are rooted in the culture of the organisation. More specifically, this study is located within the wider domain of implementation within a strategy process approach, and focuses on strategy reactions, practices and actions that happen over time within the business organisational context (Pettigrew, 1992; Van de Ven, 1992).

1.1.3. The Differentiated Workforce context

According to Huselid et al. (2005) and Becker et al. (2009), effective workforce management can have a powerful effect on business outcomes. The authors point out that while organisations have highly differentiated product strategies, most have generic workforce strategies. Managers need a paradigm shift about the workforce, away from regarding it as a cost to be minimised and towards a view that sees the workforce as an investment adding value and growth, especially in regard to the key jobs in the organisation (Conaty & Charan, 2011). The present study contends that the differentiated workforce is the single most important renewable source of competitive advantage as organisations compete through knowledge capital. This is something that strategic management research has not heeded. Indeed, this study argues that the basis of human resource's contribution to competitive advantage is the fit between the differentiated workforce through the business processes that implement strategy and the strategic capabilities that are important for organisational sustainability. Increasingly, the workforce is the business when technologies, products and systems can be leapfrogged by competitors (Huselid et., 2005; Becker et al., 2009; Becker & Huselid, 2006; Beatty & Schneier, 1997; Ulrich & Beatty, 2001, Huselid & Becker, 2011).

Despite these insights into the important role played by the differentiated workforce, the extant literature still considers strategy as a management process with a top-down formulation in regard to implementation (Van de Ven, 1992; Hambrick, 2007). Some scholars (e.g., Floyd & Wooldridge,

1994) warn against this view. According to the authors, the top echelon's view fails to make a distinction about the various contributions that other management levels and other employees make, and specifically, the possibility that the differentiated workforce could play strategic roles.

Strategists, in line with the SAP perspective, consist of various groups of actors. They can be members of management at different levels of the organisation as well as external actors like consultants, analysts and regulators who are seen as influential (Golsorkhi et al., 2015). Increasingly, SAP literature acknowledges the significance of middle managers and, more specifically, the importance of the lower-level workforce as strategic actors (Laine & Vaara, 2007). For instance, Laine and Vaara (2015) re-emphasise the primacy of the view that organisational members who are not in managerial positions have been gaining importance in recent years. In fact, by identifying the differentiated workforce as key strategists, the empirical research grows outside the traditional management perspective.

Strategic leadership occurs at all levels (Nonaka, 1988). In support of this view, Bartlett and Ghoshal (1993) conceptualise strategy-making as being reorganised. Wooldridge, Schmid and Floyd (2008) raise the possibility that a more substantive position for the workforce and mid-level supervisory managers in the strategy implementation process emerges in a flatter and more entrepreneurial knowledge- intensive business milieu. Competitive business conditions produce a new model that results in the cooperation of different management levels with changes in their roles, and, in particular, the workforce in organisations (Wooldridge et al., 2008).

What distinguishes organisational performance? The present study argues that it occurs through the differentiated workforce and not at the top, but with strategic jobs and strategic players. The argument of the present study is consistent with the findings of Floyd and Wooldridge (2000) who claim that strategy execution is a social learning process in the middle level ranks of the organisation. It is accordingly held that top management level research does not, on its own, speak to strategy construction and implementation in organisations. This view is later endorsed by Jarzabkowski, Balogun and Seidl (2007) who point out that other groups of actors in an organisation are involved in strategy making and implementation, and as the owners and carriers of strategy, can be identified. A practice approach, according to the authors, goes beyond trumped-up views of strategy as a deliberate and top-down process.

1.1.4. Strategy implementation

According to Trainer (2004), the basic elements of the strategic management process comprise the following: environmental scanning, strategy formulation, implementation of strategy and lastly,

evaluation and control. Ansoff (1969) had already stressed the duality of strategy, that is, formulation and implementation. Importantly, strategy implementation has not been given much attention in strategic management research other than strategy formulation (Al-Ghamdi, 1998; Okumus, 2001; Bigler, 2001). As identified by Aaltonen and Ikavalko (2002), the concept of implementation of strategy might at first appear simple, with the idea of strategy being formulated and then implemented, in a linear process. The process of changing strategies into action is however a more difficult and complex activity. In this regard, Nutt (1983) as cited by Chimhanzi (2004), points out that there is considerable body of research that indicates that implementation in practice generally falls short of expectations and is plagued by problems. There has been much interest in the concept of strategy implementation and its relevance to improved business performance (Becker, Huselid & Ulrich, 2001; Kaplan & Norton, 2001). For example, superior performance in the effectiveness of strategy implementation has been highlighted as a key challenge for American organisations. Similarly, strategy implementation was identified by an Ernst & Young Survey of 275 US portfolio managers as the most important intangible asset of 39 non-financial variables.

Notwithstanding the importance of strategy implementation, it must be stressed that both formulation and implementation are linked (Noble, 1999). Noble further points out that for premium organisational performance, both formulation and implementation are necessary processes for success. Together they must be seen as an integrated function that cannot be separated (Jansen van Rensburg, 2016). Accordingly, this study argues that the two processes are intertwined, forming part of a broader integrated strategy management approach (Paroutis, 2008). In the rapidly changing and dynamic business environment of today, this dictates the need to explore the activities of the workforce as they carry out the execution of strategy.

1.2. PROBLEM STATEMENT

In their study, Johnson et al. (2007) confirm that traditional strategy scholarship overlooks the focus on human actors and their actions in strategy implementation. The literature that focuses on individuals stresses mainly top and middle management levels. It is necessary to accept that not only management can act strategically: strategy is something that an organisation does. Many SAP scholars like Huy (2001), Wooldridge, Schmid and Floyd (2008), and Davis (2013) support this perspective. Mantere and Vaara (2008) assert that strategy implementation in an organisation is not solely the preserve of management since it is dispersed throughout the organisation among professional non-managerial levels, and among different management levels, that is, the workforce (Hansson & Martensson, 2011). A knowledge gap still exists from the literature in developing economies such as South Africa especially in creating strategy, and despite the fact that research has been conducted on

top and middle level management and strategy implementation. Indeed, the actions of the differentiated workforce, in particular the strategic employees in key jobs, are open for exploration in strategy implementation.

Much recent SAP work has shown that the workforce in general, i.e., mid-level managers are also strategists. Unlike management with defined strategy roles, employees usually have undefined roles, and, to this end, according to Balogun (2003) and Mantere (2005), they influence strategy implementation practice through their social, interpretive, linguistic and personal knowledge bases. For organisational survival, competitive advantage, and long-term organisational sustainability, the actions of the workforce are also critical through their unintended and indirect impact on strategy implementation. It is therefore critical to open the research agenda and recognise other employees as strategists in strategy implementation, not only management (Balogun, Jacobs, Jarzabkowski, Mantere & Vaara, 2014; Balogun, Best & Le, 2015).

More specifically, this work shares the assumption in the literature that strategy implementation is the most difficult and challenging phase in the strategic management field (Al-Ghamdi, 1998; David, 2012). Similarly, the extant literature concurs that strategy implementation has attracted much less research than strategy formulation (Al-Ghamdi, 1998; Bigler, 2001; Li, Guohui & Eppler, 2008). Why is this the case? According to Jooste and Fourie (2009), the high failure rate of implementing strategy demonstrates that there are obstacles to execution in South African organisations. Despite this, strategy implementation has been neglected (Smith, 2011), and there is a lack of successful implementation of projects. These failures normally happen during the implementation phase of the strategy. To date, scholars have ignored the strategy implementation aspect while more knowledge has been accumulated regarding strategy formulation (Hrebiniak, 2008; Noble, 1999). Many authors (e.g., Carlos & Sergio, 2008; Mankins & Steele, 2005; Neilson et al., 2008; Raps, 2004) argue that given the main drawback of formulated strategies with up to 90% failure, the dearth of strategy implementation research is unfathomable.

Since the 2008 world financial crisis, the African insurance industry has been characterised by continuous disruptions (PwC Research Report, 2018). By global standards, the industry has been exposed to major challenges owing to low level market penetration, a sector that is mainly underdeveloped, unrelenting regulatory changes, demographic changes, customer behavioural changes, and rapid urbanisation. The sustainability of the industry and how it responds to these challenges will influence its competitiveness and the need to focus on new ways of doing business (PwC Research Report, 2018).

1.3. RESEARCH QUESTION

According to Bryman and Bell, cited in Samuel (2016), the research question highlights the actual information that is required. The research question comprises the researcher's expression of problems into the requirement for an investigation. Furthermore, these authors assert that research questions are crucial because they locate the theoretical framing of the study. More importantly, as identified by Bryman and Bell (2011), research questions also direct the resolutions about the type of research design to utilise, the kind of data that will be collected, how data will be analysed, and how results will be interpreted. In terms of the research problem, the research questions are as follows:

1.3.1. Primary research question

What practices are employed by the differentiated workforce in general, and in selected strategic jobs, that contribute to strategy implementation within the insurance industry in South Africa?

1.3.2. Secondary research questions

In this study the following are the secondary research questions:

- What are the roles of the differentiated workforce in strategy implementation in organisations?
- How does the differentiated workforce in business organisations employ the materiality of strategy implementation work?
- What are the enablers of the strategy implementation work of the differentiated workforce in the organisations under investigation?
- What are the constraints of the strategy implementation work in the organisations under investigation?

1.4. PURPOSE OF THE STUDY

The purpose of this study is to investigate the strategy implementation practices of the differentiated workforce at selected South African insurance business organisations. The results of this study are expected to form a new theory (baseline) on the materiality, in other words, the material objects (e.g., textual objects) of strategy implementation practices within local business organisations, and the enablers and constraints of the differentiated workforce's strategy work in implementation. Following from this, as pointed out by Gioia, Patvardhan, Hamilton and Corley (2013), rather than using

preconceived conceptions of strategy implementation, this research is based on an exploratory study that highlights the differentiated workforce as the actors themselves in order to discover new, situated conceptualisations rather than imposing existing ones. The SAP perspective which has framed much of this study has inspired this exploratory approach. Strategy implementation, here, is perceived as a socially accomplished activity within a situated organisational context (Jarzabkowski, Balogun & Seidl, 2007; Johnson, Melin & Whittington, 2007; Whittington, 2006).

1.5. RESEARCH OBJECTIVES

A research objective is the researcher's account of a business problem. According to Bryman and Bell (2011), objectives explicate the aim of the research in measurable terms and describe standards of what should be attained by the research. The following research objectives were formulated, based on the above research question:

1.5.1. Theoretical objectives

In terms of the literature review, the following theoretical objectives were formulated:

- Conduct an extensive review of the literature to gain a better insight of the conceptualisation of the strategy-as-practice perspective, the differentiated workforce, and the enablers and barriers of strategy implementation.
- Undertake an extensive conceptualisation of *how* and *where* the work of strategy implementation is created, and *who* does this strategy implementation.
- Undertake a conceptualisation of how the work of strategising organises itself, and how the members of the organisation view the strategy implementation process.
- Through an extensive literature review, gain insight into how the differentiated workforce engages with the material aspects, namely, tools of strategy implementation work, talk and text; estimate the importance of contextualising micro-action within a wider social context, and how this influences the strategy implementation process.
- Probe deeply into SAP literature to gain a better understanding of the conceptualisation of what the meaning of the events, routines and practices of strategy implementation process have for practitioners and how the differentiated workforce acts and practices strategy implementation through daily experience within the business insurance organisational context.

- Examine the roles of the differentiated workforce in strategy implementation through a comprehensive review of the literature to shed light on and account for the various practitioners that are crucial to strategy implementation.

1.5.2. Empirical objectives

Fundamentally, this study aims to explain the strategy implementation practices of the differentiated workforce by supplying primary data in an insurance business organisational context.

In terms of the empirical study, the specific research objectives are as follows:

- Examine the locally institutionalised business organisational strategy implementation practices of the differentiated workforce as embedded in the actual lived work-life knowledge of the workforce as opposed to abstract practices.
- Investigate one group of actors, the differentiated workforce, and the way they do strategy by exploring their practices in strategy implementation.
- Gain insight into the tools and techniques used by the differentiated workforce, in particular, the strategic key "A" players, in two South African insurance companies in strategy implementation.
- Understand how the differentiated workforce uses and communicates the socio-material artefacts in their strategy implementation practices.
- Determine the impact of individual members of the differentiated workforce (as identified above) on the way organisational strategies are shaped in strategy implementation, and how this influences what business units do.
- Identify the enabling and constraining conditions that influence the strategy implementation practices of the differentiated workforce.

1.6. RESEARCH GAP AND JUSTIFICATION OF THIS STUDY

The differentiated workforce practitioners play an important role in organisational strategy implementation. While there are studies that focus on organisational members beyond Top Management Teams (TMTs) (e.g., Ezzamel & Willmott, 2008; Jarzabkowski, Le & Van de Ven, 2013; Laine & Vaara, 2007; Mantere, 2008; Manrete & Vaara, 2008; Nordqvist & Merlin, 2008; Rouleau, 2008; Stieger, Matzler, Chatterfees, Ladatatter & Fussenegger, 2012), there is a need to develop a more contextualised insight into how the differentiated workforce as organisational actors can influence strategy implementation. The aim is to problematise the currently limited notions of

what is seen as strategic, and to extend the current conceptualisations of strategy processes and strategy implementation work. Such analysis, as Laine and Vaara (2015) note, could lead to a clearer, more detailed, and more nuanced account of the origins of strategic ideas, how they are formed, made sense of, and legitimised, and how the differentiated workforce, through their interactions, contributes to those strategy implementation processes. This study, therefore, resonates with a growing number of studies that draw their analogy from open innovation (Whittington, Cailluet & Yakis-Douglas, 2011).

However, very little is known about the organisation's strategic jobs and key players, a vital few employees who have a major impact on the organisation's business results. A growing body of research argues that during these challenging economic times, strategic key employees could represent a significant competitive advantage (Becker & Huselid, 2006, 2010; Boudreau & Ramstad, 2005). It is necessary to look at the differentiated workforce within local organisations to understand strategy implementation work as well as knowing what hinders and enables it.

Against this background, it is evident that by showing how the differentiated workforce uses strategy implementation practices, as organisations construct and plan their strategy processes, this study will be a useful addition to current research. Furthermore, this study contends that for business renewal to emerge, the use of consistent strategy implementation practices and the degree to which the differentiated workforce has enabling experiences of execution practices become important. In their attempt to clarify why strategy implementation is difficult and complex, organisations may find the study useful, especially since research on workforce differentiation and strategy implementation, particularly in South Africa's diverse and multi-cultural organisational work context, appears to be limited.

The obvious limitations of traditional strategy research in recognising the agency of practitioners gave rise to the growth of SAP research, but, as has been suggested, this research is dominated by strategy from a formulation view. Further, and according to Hutzschenreuter and Kleidienst (2006), within the process tradition, most of the studies explore the effects of the top management team (TMT) on the process of strategy implementation and its results. As a result, empirical evidence for how individual TMT members as practitioners develop strategy implementation practices is rare and, for this reason, a gap in the literature is considered to exist.

There is, therefore, a research need that explores how people follow and implement strategic goals in real life. This study uses the SAP approach to examine contextual and institutionalised practices rooted in the organisational reality, routines and culture in strategy implementation.

1.7. MOTIVATION OF THE STUDY

There has been a dearth of research interest in the strategic management field regarding the differentiated workforce as strategic players with strategic jobs:

- While previous studies (e.g., Jarzabkowski, 2008) focused primarily on top management, referred to as the upper echelons perspective by Hambrick (2007), and to a limited extent on middle managers (Mantere, 2008), the current study investigates non-management-level key professionals, i.e., the differentiated workforce as strategists in strategy implementation.
- The research adds to our understanding of the actions and activities of the workforce in their influence on business renewal and in strategy implementation.
- The study provides strategy research with insightful new knowledge of what strategy implementation processes are in practice.
- New theories of the differentiated workforce practices and the materiality of strategy implementation work within the business organisational context may be generated.
- A baseline study is provided on the enablers and constraints of the differentiated workforce's strategy implementation work in order to construct a new theory**.**

In terms of the differentiated workforce practices in the strategy implementation process in general, this research begins to strengthen a new field of study. Moreover, within a business context in South Africa, it makes an inventive contribution to the emerging field of differentiated workforce practices. In addition, this study could collaborate to narrow the gap between practice and theory by analysing real-life activities and knowledge of the differentiated workforce, thus giving a clear account embedded in the complex social existence as narrated by the differentiated actors who interact to accomplish the work of strategy implementation.

This work will add to current practical, theoretical and empirical contributions to strategy implementation and SAP knowledge. By developing a new (baseline) theoretical conception that emphasises lower-level organisational members as being critical to strategy implementation, this treatise proposes a new approach, shifting away from conventional conceptions in the field. Currently, no research exists that explores the differentiated workforce and its processes and practices in strategy implementation in the South African context. It is hoped that this study will redirect contemporary research narratives of how the organisation influences strategy implementation and, more, to how the differentiated workforce influences strategy implementation.

By developing a theoretical perspective, hence offering an approach for knowledge accumulation to critique a new theoretical conception, this treatise also adds to research cooperation by subjecting the proposed theoretical perspective to an empirical test. Lastly, a practical implication of the study is to help management realise that optimising the differentiated workforce can enable their activities and practices in strategy implementation. The trend of unsuccessful and poor organisational performance that plagues strategy implementation in modern organisations can potentially be stemmed.

1.8. RESEARCH APPROACH

By using a qualitative inquiry, this research employs a case-study perspective to provide greater insight into the practices of the differentiated workforce and their agency-enabling conditions, plus the barriers and materiality encountered in their strategy implementation work. A constructivist-interpretivist research paradigm guides this work. Rather than being an externally singular entity, reality, as perceived by constructivists, is developed in the mind of the participant (Hansen, 2004). According to Sauders et al. (2016), interpretivism holds that it is important to understand the differences between people in their roles as social actors. Reliance on participants' understanding of the situation being studied is crucial (Creswell & Creswell, 2018). An exploratory study, by allowing researchers to ask questions, helps to develop a consistent theory in the form of a narrative. The research questions and the philosophical bases of this research informed the research approach adopted.

1.9. DELINEATION OF THIS STUDY

The demarcations of this study are as follows:

- The practice of strategy implementation of the differentiated workforce is the key focus of this study. This study thus explores the strategy implementation practices of the differentiated workforce in two insurance organisations in South Africa. For this reason and because management teams were not included, generalisation is not possible as this research is a qualitative study situated within a demarcated field.
- The study looks first at strategy implementation via a theoretical approach, using constructs in line with a constructivist approach. Thereafter, the focus of the research is aimed at the practices used by the differentiated workforce to implement strategy in a complex and changing insurance business environment.

- Although formulation and implementation within the field of strategic management could be seen as two distinct concepts, in this study they are interrelated.

1.10. LIMITATIONS

The limitations of this study relate to the fact that this was a cross-sectional study, undertaken over a short period due to time constraints. Also, the sample was drawn from only two insurance organisations and thus cannot be seen as representative of the entire industry in South Africa. Literature on strategy implementation, especially from the perspective of the differentiated workforce within the SAP field, is not very common as the field is a young discipline within strategic management scholarship. While this could be a limitation, it may also provide an opportunity for knowledge creation in the current body of knowledge.

The field of strategy is fragmented by diverse views, and is characterised by disparate research agendas, so there is little in the way of cumulative knowledge. The field is dominated by an objectivist ontology with strategic choice as the key focus thus ignoring strategy implementation and the constraints that organisations face. The formulation-implementation split has become a routine part of strategic management education with research done in isolation.

The inclination to assign anthropomorphic qualities to organisations results in overlooking the human elements in strategy implementation work, when people are key to organisational work. To this end, the field has removed itself from the richness, messiness, ambiguity and complexity of strategy implementation as experienced by practitioners because much of the research is dominated by instrumental rationality with reliance on large statistical databases and large sample sizes. Moreover, according to Gerson (2006), most research is done in isolation, with researchers working in silos, and thus losing the interactive perspective that arises when a more holistic approach is adopted.

1.11. LAYOUT OF CHAPTERS

To build up to the specific research problem and objectives, the study follows a logical progression:

Chapter 1: This chapter comprises the introduction to the study and outlines a succinct approach to the present work by highlighting the background to the study, research questions, purpose of the study, research objectives, research gap and motivation of the study.

Chapters 2, 3 and 4 contain the literature review of this work. The aim of Chapter 2 is to strengthen the perspective of the present study by presenting a comprehensive brief of the global insurance

industry, the business environment, the strategy terrain and strategy implementation as a focus of this study. Strategy enablers and constraints are explored and a methodological framework is proposed for conducting the study. Materiality and tools used in implementation are explored.

Chapter 3 provides an overview of the strategy-as-practice approach and the development of the practice perspective.

Chapter 4: This chapter covers the differentiated workforce and their strategy implementation practices. It reviews the literature on their strategic roles and confirms the importance of the differentiated workforce.

Chapter 5: Explained in this chapter are the research design and methodology utilised in this work. The research strategy adopted, the selection of the participants, the data production method, and the data analysis process are the focus of this chapter.

Chapter 6: This chapter deals with the research findings of the current study.

Chapter 7: Conclusion and recommendations. This chapter interprets the findings, and links them back to the theory. The limitations of the study as well as pointers for future research are the topic of this chapter.

1.12. CHAPTER SUMMARY

This chapter provided a general overview to the current study in order to furnish a solid academic framework for the work. In order to paint an insightful context to the present study, the theoretical framework, SAP view, strategy implementation approach and the differentiated workforce perspective were reviewed. The importance of researching the differentiated workforce through the SAP lens was presented. In addition, the chapter articulated the research problem, provided the research questions, and set out the research objectives to equip the study with an appropriate approach.

The following chapter provides a background description of the insurance industry globally and the challenges confronting insurance companies. The chapter then looks at the review of the literature and the field of strategic management and strategy implementation.

2. STRATEGY AND STRATEGY IMPLEMENTATION

2.1. INTRODUCTION

This chapter will begin with a review of the related literature which informs and underpins the central research question. Firstly, the extant literature on the insurance business sector in South Africa and globally is reviewed. Second, a background to the research question is provided. SAP is located as a nascent focus area that still needs to be developed within a differentiated workforce approach. The literature review develops a dominant strategic view of practice that positions the research within strategic management and social science theories. To steer the debate of diverse, wide-ranging literature on strategy implementation and strategic management, academic empirical scholarship in this chapter is explored, this theoretical framing is substantiated.

An overview of the insurance industry is presented next as the context used in this research.

2.2. OVERVIEW OF THE INSURANCE INDUSTRY

2.2.1. Introduction

This research explores the activities of the differentiated workforce within the insurance business organisational environment. More specifically, the research investigates two insurance organisations in South Africa which offer a wide range of insurance products, spanning both short-term insurance (e.g., healthcare, home, and automobile products) and long-term insurance (life-insurance, investments, and pension products). This literature review includes a description of the business climate in South Africa, and the current state of the insurance industry. In addition, an attempt to include a benchmarked insurance company with a description of the organisation's strategic management and planning process will be included to contextualise the micro action of the differentiated workforce in context.

Balogun, Huff and Johnson (2003, p. 197) assert that a growing need for researchers to be close to the phenomena creates methodological challenges of strategising. While researchers must concentrate on context and detail, taking into account the unique characteristics of the organisation which require deep data gathering, they should also focus simultaneously on the broad scope of the study.
Whittington (2006) and other SAP scholars highlight the significance of contextualising micro-action within the SAP approach. The work of Jarzabkowski et al. (2007) is also relevant to this perspective. Micro-phenomena, the authors concur, need to be understood in their wider social context. In other

words, actors are not acting in isolation. This implies building upon the regular, socially defined modes of acting that arise from the many social institutions to which they belong. Importantly, much of the social infrastructure, namely, tools, technologies and discourses through which micro-actions are created, have macro, institutionalised properties. According to Wilson and Jarzabkowski (2004), and Seidl (2007), this social infrastructure, whilst being adopted and adapted differently within micro-contexts, enables the transmission of the social processes within and between contexts. As identified by Balogun et al. (2005), an actor's action is always linked to the context and situation within which agency occurs. The purpose of this section, therefore, is to provide an organisational context of the insurance industry to help readers become familiar with this sub-sector within the financial services industry.

2.2.2. The International Insurance Industry at a glance

According to the PwC Research Report (2018), by international standards the African insurance industry, is largely underdeveloped and insurance penetration levels are very low. Indeed, since the 2008 world financial meltdown, the African insurance industry has also been in a state of continuous disruption, and while the sector has adapted to the disruption, the regulatory environment continues to be the most dominant disruptive force. The PwC Report (2018) maintains that the regulatory changes make it difficult for the sector to focus on organic growth. Other major challenges include technological advances, demographic changes, customer behavioural changes, and rapid urbanisation. The PwC Report (2018) suggests that, to survive, the sector need to reinvent itself and to compete with the new entrants converging on their territory.

2.2.3. The South African Insurance Industry

According to the 2014 UCT Report, South Africa is the largest market in Africa, ranking in the top 20 of the global share in the industry. According to this report, South African industry is world class in terms of size, soundness and sophistication. This is mainly due to the rigidity of the legal system, the stability of South Africa's financial and economic system, and the robust regulatory framework. These constitute a solid foundation for business space. The growth of the middle class has also provided an impetus for growth in the sector (UCT Report, 2014).

The life insurance sector has developed a commercial and financial relationship with the banking sector which is dominated by four major banks. Currently, the long-term savings industry in South Africa is dominated by the life insurers.

According to the Financial Sector Conduct Authority (previously called FSB), the statutory body regulating the non-banking financial sector, there were 193 registered insurers operating in South Africa in 2012 (FSB Annual Report, 2012). Of these insurers, 87 are classified as long-term insurers and 106 as short-term insurers. Importantly, there are two insurance trade associations that are active in South Africa. The South African Insurance Association (SAIA) represents 58 short-term insurers. The Association for Savings and Investments South Africa (ASISA) represents life insurance. According to the Insurance Sector Education and Training Authority (INSETA), 1 774 organisations are members (Sector Skills Plan, 2011 – 2016). These registered insurers employed approximately 111 840 skilled and highly skilled people in 2013.

As stated earlier, a small number of large diversified insurers with links to the Big Four banks dominate the local insurance sector. According to the UCT 2014 Report, the relationships are presented below:

- Old Mutual owns 55% of Nedbank. Its operations include Nedgroup Life, NGIB, and Mutual and Federal Insurance (second largest non-life company in SA);
- Liberty Holdings, holding company for Liberty Group, is owned by Standard Bank;
- MMI which was formed via a merger of the Metropolitan and Momentum Group, has a strategic relationship with the FirstRand Group, with OUTsurance in the FirstRand stable;
- ABSA is involved with Bancassurance, and has many subsidiaries operating in the life and non-life insurance sectors.

The leading non-life insurer in the South African market, Sanlam, is another key player in the sector, and owns majority shareholdings in Santam. Hollard, one of the biggest privately owned insurance companies, operates in various segments of the insurance market. Discovery is a specialist healthcare insurer, and has recently diversified into banking. The South African market is also open to a number of dominant global insurance companies like Zurich, Chartis, AIG, ACE and Allianz with a substantial local presence in both the life and non-life insurance sectors to varying degrees. According to Professor Robert Vivian (personal communication), AIG is the second largest international insurance company worldwide, with a major footprint in the US, Middle East, China and Far East and the Euro zone.

2.2.4. Challenges in the South African Insurance Sector

To thrive in digital disruption, insurance companies need to protect their core business while expanding into new areas with workforces that are lean, agile and willing to embrace change. Creativity and flexibility are needed to navigate the regulations and fast-changing policy frameworks. Further, softer skills – from problem-solving to communication – are needed to boost sales, enable collaboration and to deliver personalised experiences to customers (PwC Report, 2018).

Many insurance organisations are beginning to recognise the talent changes that are needed in a company (AICPA Report, 2017), and recognise that a differentiated workforce is pivotal to the success of an organisation. For example, software and analytics will enable many underwriting, claims processes, and decisions to be automated and processed without people involvement (AICPA Report, 2017).

Such advances are already shrinking the size of the traditional insurance workforce and are changing the nature of work for many existing employees (AICPA Report, 2017). These are currently being experienced by the banking sector with the traditional middle manager roles being mostly eroded. More importantly, as this digital disruption takes off, the employees will need new or enhanced skills. This can be illustrated by product developers becoming proposition designers, and being more focused on developing and delivering outcomes that customers value. In other words, to achieve company objectives, product developers would work in virtual teams with customer experience specialists and partnering organisations to develop new products and to bring new business models to life. Similarly, underwriters will team with data scientists to leverage new broader sets of data from both within and outside the organisation (AICPA Report, 2017).

2.2.5. HR response

Companies are finding that they need to adjust their structures, culture and practices to remain competitive in a fast-changing market landscape. Many markets and businesses have been significantly disrupted by agile and efficient startup companies. This has inspired incumbents to reduce costs and barriers embedded in traditional hierarchical structures and to streamline operations by reforming their business structures.

In response to disruptive change, companies are developing flat organisational structures to deal with the new reality (Rashipa, 2014). A flat organisational structure configures the organisation as a network rather than a traditional hierarchy. In adopting this approach, organisations may organise into self-managing teams and adopt the techniques of self-management (Rashipa, 2014). By allowing

employees to set their own goals and self-manage how they meet tasks and objectives, individuals assume more responsibility for their own tasks and priorities. The rationale behind this is to create a more responsive organisation that is streamlined and more efficient with improved employee accountability and morale, and also enhanced performance (Rashipa, 2014).

Coupled with these realities the South African banking sector is increasingly shifting towards a 'marketplace without boundaries'. This is shaped by the fast-approaching entry of new digital players driving unprecedented levels of innovation, and challenging the status quo. To this end, large-scale transformation programmes which are aimed at improving customer experience, digital transformation, new ways of working, and enterprise-wide cost reduction remain as major challenges in the sector. As part of cost-cutting exercises, middle management levels have been impacted in most of these organisations (Borkar, 2010; Strinfellow, 2010).

Financial services organisations are continuously exposed to intense pressures linked to market forces, customer expectations, globalisation, structural changes like divestments and acquisitions, cost reduction, digitisation and regulation, among others, and the ability to change constantly has become a competitive advantage (Rishipal, 2014). According to PwC and Accenture, agile organisations will thrive in this volatile and digital world, while those trapped in legacy business models and unable to change quickly will fall behind.

2.2.6. Strategy Research in the Insurance Industry

Strategy theory and research has remained surprisingly silent on human actors and their actions (Johnson et al., 2007). The studies that incorporate individuals focus mainly on TMT and middle management levels. In developing economies such as South Africa a knowledge gap still exists, especially in strategising (Davis, 2013; Jansen van Rensburg, 2016). Similarly, there is dearth of research within the insurance business environment. An extensive search on specialist databases suggests that no previous research has focused solely on the differentiated workforce within the South African insurance context. The research undertaken here could serve as a baseline to lay the foundation in order to understand strategy implementation work within local organisations.

Regarding research conducted within the insurance industry a few studies were conducted in developing countries within the sector from SHRM in Nigeria, Kenya, Malaysia, and India. Although studies have been conducted on SHRM in the insurance context in developing countries, none of the studies was conducted in the South African insurance industry. In addition, none of the studies focused on the differentiated workforce using the SAP approach.

The next section briefly introduces the business environment.

2.3. BUSINESS ENVIRONMENT

The aim of this section is to show the progress made, and the resultant need for further continuous improvement in the business management context at a time when we are witnessing a fundamental shift in the world economy. Today national economies have moved from relatively self-contained entities towards a world in which barriers to cross-border trade and investments are tumbling. Advantages in transportation and telecommunications technology result in the shrinking of perceived distance, and national economies are emerging as interdependent global economic systems in a world where material culture looks similar the world over (Hill, 2003).

In order to be able to examine the nature of business and to substantiate the significance of improvement and change it is important to highlight the purpose of business. For a business to exist it may be concluded that there are several objectives, which can vary depending on the owner's vision and needs, but which include adding value in society. Over time the need for businesses to develop and evolve, along with their respective management models and methodologies, becomes increasingly evident in a shifting and complex business environment. Businesses need to engage in continuous improvement, adopt better management and models, seek out new theories, and strive for more competitive positioning. The requirements for continuous improvement efforts are crucial for continuous adaptation and need to be identified as a matter of urgency (Jansen van Rensburg, 2016).

2.3.1. General management

Management encompasses the activities that a person executes to achieve organisational goals while taking advantage of available resources to achieve prescribed goals within the organisational context. As described, continuous improvement efforts must be directed and facilitated by management activities to achieve business success (Jansen van Rensburg, 2016).

In order to give context to this study, it is important at this point to identify management theories, albeit briefly. According to Bateman and Snell (1999), the four basic management functions are planning, organising, leading and control. There are several other functional areas that support the management function such as Sales, Finance, HR, Operations, amongst others, within the area of general management. In the definition of General Management, according to the Harvard Business School, the concept involves leadership and management of the enterprise as a whole.

This research has taken cognisance of the constant drive towards continuous improvement in businesses which recognise the need to become more effective and remain competitive. The study will attempt to find clarity on the ways in which strategic management implements practices in this regard, and the degree to which a differentiated workforce effects such implementation in a contemporary business environment.

2.4. THE STRATEGY TERRAIN

The aim of this chapter is to develop the approach presented in Chapter 1 and show what the literature both covers and does not cover. In the strategic management literature there is abundant research regarding the characteristics that organisations require to achieve and maintain competitive advantage in the markets. However, there are surprisingly few studies specifically about those involved in making strategy. In fact, there are very limited accounts on what these strategists actually do during the strategy implementation process.

Mainstream literatures are characterised by deeply entrenched distinctions such as strategy content and strategy process research, strategy formulation and strategy implementation. These dichotomies, however, seem to equip strategic management scholars with only fragmented and partial answers regarding the practices of strategists (managers) during the strategy process. To this end, despite the fact that many mainstream conventional strategy authors like Andrews (1971), Ansoff (1965), and Christensen, Andrews and Bower (1978) have tended to regard strategy formulation and implementation as distinct and sequential activities, a growing number of researchers have treated both formulation and implementation as holistic. Hence, in support of this emergence, subsequent research has sought to provide both theoretical and, in particular, empirical foundations for this argument.

At the same time, within extant strategic management literature there is a limited analytical vocabulary with which to describe the differentiated workforce practice strategy. Traditionally, building on the notion of dichotomy, conceptual and theoretical distinctions within the strategy process arena (think vs. act, micro vs. macro, rational process vs. political, content vs. process) have restricted our understanding around the day-to-day activities of strategists. Further, as identified by Rajagopalan, Rasheed and Datta (1993), most process research has been fragmented and characterised by limited cumulative theory building and empirical testing. Equally, although different schools of strategy have provided various models of organisations' strategy-making processes, there is surprisingly little empirical evidence on how the differentiated workforce actually strategises during the strategy process. This is something that strategic management has not paid much attention to. To

this end, within the strategy process there is now a need for an area of research that deals specifically with the actions, interactions and activities of strategists. According to Paroutis (2006), this theoretical and empirical challenge has been proclaimed by those researchers involved with strategising.

On the basis of such a perspective, this study argues that SAP is an area that can contribute to strategic management research by allowing researchers to focus on the practitioners of strategy, that is, the differentiated workforce: who are they; what they do; what, when and why they use strategy tools, text, talk and materiality in strategy making. Rather than relying on the limitations of the process area to justify the existence of the practice area, this study adopts a view that combines findings from both areas to investigate strategising in the insurance business organisations in the South African context. Using this approach, this study attempts to empirically explore the relationship between strategy practices and processes as well as the ways in which ongoing organisational changes can be linked with changes in the strategy process. The contextual factors that lie at the heart of the strategy processes are thus explored, and the actions and activities of the differentiated workforce are analysed. Studying these aforementioned issues could contribute to strategy as practice area of research and could have practical relevance for strategy practitioners.

2.4.1. The Concept of Strategy

This section of the literature review aims to analyse strategic management research. To understand what is meant by the term strategy, the concept is depicted as part of the broader strategic management discipline. While some studies in the relevant literature have emphasised organisational processes, these studies have engaged less with the detailed activities, and more specifically with how the differentiated workforce performs such activities.

A clarification of common terms is required to understand the notion of strategy, as many similar terms are used in differing contexts, and many definitions with different elements and emphases, which adds to the confusion. The following are the commonly used definitions: strategic planning, strategic management, strategy process, strategy formulation, strategy-as-practice, strategic thinking, strategic decision making, strategic implementation, strategic cognition, and just plain strategy, to name just a few (Mintzberg, Ahlstrand & Lampel, 1998; Whittington, 2001; de Wit & Meyer, 2010). As used in this study, the term strategic management is an overarching term that encapsulates all activities that embody the strategic management process. Some of the more useful definitions of strategic management are provided in Table 2.1 to give an overview of the varied definitions of strategy. Some, however, do not agree on the same definitions and this leads to different interpretations of what it involves. Perhaps it is appropriate for SAP scholars to develop an alternative

perspective by which to research strategy and to allow practitioners to look at strategy differently and to contribute to knowledge in an alternative dimension.

Table 2.1: Selected definitions of strategic management

Author	Definition
Smircich and Stubbart (1988)	Strategic management is organisation making – to and maintain systems of shared meanings that facilitate organised action.
Schenel and Cool (1988)	Strategic management is essentially work associated with the term entrepreneur and his function of starting (and given the infinite life of corporations) renewing organisation.
Fredrickson (1990)	Strategic management is concerned with those issues faced by managers who run entire organisations, or their multifunctional units.
Rumelt, Schendel, and Teece (1994)	Strategic management is about the direction of organisations, most often, business firms. It includes those subjects of primary concern to senior management, or to anyone seeking reasons for success and failure among organisations.
Bowman, Singh, and Thomas (20020	The strategic management field can be conceptualized as one centered on problems relating to the creation and sustainability of competitive advantage, or the pursuit of rents.

Source: Nag, Hambrick and Chen (2007, p. 955)

To facilitate the review process, the definition by Teece (cited in Nag, Hambrick and Chen, 2007, p. 955) is introduced. According to Teece (1990), strategic management can be seen as the formulation, implementation, and evaluation of managerial actions. The tenets of Teece's definition fall within what is generally referred to as mainstream strategic management research. Rajagopalan et al. (1993) assert that this research is embedded in the content or the process with which it is developed and implemented. Within this approach, strategy can be seen as an outcome, that is, the organisation has a strategy.

Competitive strategy, as reported by Porter (1996), is about deliberately choosing. It is about planning and selecting a set of activities to deliver a unique mix of value. The epic hallmark debate between Mintzberg (1990, 1991) and Ansoff (1991) was pivotal in cementing the view of strategy. As has been previously substantiated, both rational and emergent processes of strategy are not mutually exclusive (Johnson, Whittington, Scholes, Angwin & Regner, 2015), and strategy thinking within mainstream strategic management literature is still typically portrayed as the property of an organisation (Whittington, 2006). In response, strategy-as-practice (SAP) research contradicts the mainstream view. According to SAP, strategy is seen as an activity that people do to accomplish strategising (Whittington, 2006). The SAP perspective is presented in chapter three and the strategy

implementation approach will be investigated in greater detail later in this chapter. According to Mintzberg and Waters (1985), strategising should be seen from a broad perspective, not only in terms of managers formulating plans. Emergent strategy occurs when there is action over time in the absence of intention about the strategy. On the other hand, deliberate strategies are realised strategies that are formed as intended (Mintzberg et al., 1996). Emergent strategy implies adapting to and learning about new things that work. According to Davis (2013), deliberate strategies tend to focus on TMT direction. On the other hand, the more emergent strategies open the way for collective action. Within this study these two concepts are dealt with as formulation and implementation, and form the foundation of this research. They will be discussed in detail in this chapter.

In what follows, the objective is to provide background information to, and a sense of the emergence of, the strategic management field, and while strategic management and its historical development are beyond the scope of this study, SAP sits within a reasonably well-defined process through which much individual strategy making is expected to occur.

In its generic sense strategy is not a recent phenomenon even though its study as an academic discipline is relatively new. In reality, the desire of individuals and companies to be in advantageous future positions has been around for millennia, whether it is about survival or achieving success through leadership in war, politics (Segal-Horn, 2004) or commerce.

Freedman (2013) states that diverse disciplines such as economics, sociology and military planning have influenced strategy literature. As mentioned earlier, finding an agreed definition within the literature is difficult, though it appears that strategy in general is a well-defined area. That strategy needed five definitions, detailing strategy as a plan, a pattern, a position, a perspective and a ploy was put forth by Mintzberg et al. (1998). Markides (1999) on the other hand, noted that there is a lack of common understanding among managers and academics about the content of strategy, concluding that what strategy is or how to develop it is unknown. On the one hand, SAP scholars (e.g., Jarzabskowski, 2005; Whittington, 2006) define strategy not as object, but as an activity. Commonly used, the term strategy adds significance and magnitude, especially when added to descriptive words such as marketing strategy and investment strategy. Overall, Segal-Horn's (2004) observation that 'strategy' is not only a poorly understood term but is one of the most over-used in business, appears insightful.

As seen in Table 2.1 despite the plethora of definitions of strategy and strategic management, there are still contradictions as they differ in scope and focus, according to Nag, Hambrick and Chem (2007). While Bracker (1980) identifies seventeen diverse strategy definitions, Nag et al. (2007) provide eleven definitions of strategic management. In terms of scope, some of the definitions depict

general managers; some present the organisation as the unit of analysis; some stress performance; some focus on internal resources; some are linked to implementation; and others are rooted in unique views. Thomas, Wilson and Leeds (2013) point out that to the rest of the academic community this suggests that strategic management has presented the field as one developing in a positive fashion along a natural trajectory, while internally, the strategic management community has not reached consensus.

In fact, the wealth of academic views accumulated over the years frames Nag et al's. (2007) definition. But it is also important to highlight that until recently, practitioner views on the phenomenon were absent. Paroutis and Heracleous (2013) acknowledge this limitation. The authors assert that the research community's understanding of what strategy actually means to strategy practitioners is limited. Jarzabkowski and Spee (2009) point out that the absence of individuals from the majority of mainstream strategic management literature was the main reason. This point will be expanded in the course of this literature review. Paroutis and Heracleous (2013) claim that their recent study is the first that endeavours to identify first order meanings, that is, what strategists themselves mean by the term strategy, despite Barry and Elmes' (1997) argument that strategy is a narrative fiction. In their view, therefore, the stories of strategy practitioners are worthy of research.

Given the extant literature review on strategic management and strategy, the following observations on the topic can be made: there is no consensus on strategy definition; progress towards a consensus view is limited; and strategy-like practice has been carried out for centuries, seemingly without the need for a clear definition. Perhaps most importantly, as McEwan (2016) notes, there is general support for the view that strategy-like practice existed before the emergence of strategic management as a modern academic field. Knights and Morgan (1991), in continuing this line of reasoning, suggest that if strategy is that critical, how then did organisations survive without 'consciously' having a concept of strategy. As Paroutis and Heracleous (2013) conclude, the view of strategy from the strategy actors' lens is a gap in the scholarship. Furthermore, the researcher maintains that even though there is no formal definition of strategy and strategic management, a significant aspect that emerges from the literature, as identified by Clegg, Kornberger and Schweitzer (2011), is the notion that there is a dominant strategic management paradigm that has influenced both teaching and practice.

2.4.2. The Dominant Strategic Management Paradigm

According to Guba and Lincoln, (1994), a paradigm is a basic set of beliefs that describes a person's worldview and guides their action. Scholars use a range of similar terms such as classical strategy

(Whittington, 2001), mainstream strategy (Jarzabkowski and Spee, 2009), traditional strategy (Mintzberg, 1998) and strategy orthodoxy (Thomas et al., 2013). The history of the paradigm and how it has evolved in the strategic management discipline will be outlined.

The concept of paradigm can be traced back to Kuhn (2012) in the field of science. According to Astley (1985), within a scientific, physical or social community, there are unanimously agreed upon and subjectively generated world views. On this note, it is relevant to note, as the researcher has above, that the existence of a dominant strategic management paradigm is embedded within the literature and it is often referred to explicitly, though by different names, as indicated above. Classical strategy approach, according to Whittington (2001), is acknowledged as the oldest and most influential. Knights and Morgan (1991), on the other hand, refer to it as the orthodox strategy discourse proposed in business schools and adopted by practitioners while Shrivastava (1986) reports that orthodox strategic management is centred on an ideology that supports the status quo. More recently, Thomas et al. (2013) label the strategy discourse a largely unquestioned orthodoxy that has become influential in both practice and theory. In the now famous research, Nag et al., (2007) extend the dominant paradigm notion by suggesting that a strong agreement existed within the research community, although it has limitations.

Clegg, Carter, Kornberger and Schweitzer's (2011, p.15) definition of the dominant strategic paradigm is relevant in this study:

> Top-down control systems orientated towards performance as the means of achieving the overarching aim of whatever goals have been specified by top management. The stress is on practices that are held to be efficient and effective, using the rhetorical devices and the environmental modelling associated with orientations to financial and market performance, stakeholders and customer service. Efficiency and effectiveness serve as justifications for whatever human, organizational and environmental consequences ensue.

According to Whittington (2001), this view of strategic management is heavily dependent on military command and control style. Rumelt, Schendel and Teece (1991) acknowledge that this paradigm is also positively influenced by the economics field. Mintzberg et al. (1998) come to the conclusion that in a series of distinct steps, a strategy is grounded in the economic theory that individuals are rational and act to maximise the benefits for themselves. Further, these authors claim that it is formulated by those in command and executed by operational managers. Mintzberg (1994) points out that it requires that the future be predicted through rational synthesis and hard data with a degree of accuracy for this strategy to be effective.

The emergence and birth of theories of classical strategic management, for example those by

Mintzberg et al. (1998), Segal-Horn (2004) and Middleton (2002), have been influenced by the American perspective. The dominant approach had an impact on the European business schools as their experiences are similar to their US counterparts. These accounts further laid the general foundation for the emergence of strategic management as a modern academic discipline in the US in the 1960s. Early pioneers at the time included Selznick, Chandler, Ansoff, Andrews and Sloan. Equally, leading US institutions such as MIT and Harvard, and large organisations like GM and Ford, the conceptual and theoretical view that developed was one of rational planning via a top-down approach that suited the post-war environment in America (Segal-Horn, 2004).

As will be obvious from the above developments, these accounts, seen in retrospect, could be regarded as rational since they are based on analysis and planning, and constitute what is referred to as the dominant strategic management paradigm. In support of this view, the more integrative current philosophical view of the dominant strategic management domain is discussed in this section.

By assessing which organisational capabilities are needed to reach company goals, strategic management is the managerial skill used to formulate, implement and execute a chosen strategy. Management actions, interventions, choices and processes are strategic management components and are achieved by determining which objectives of the organisation should emerge after the mission and vision (Lynch, 2006), developing operational plans and projects to address the business objectives, and taking responsibility for the internal management of the organisation including the workforce, implementation and co-ordination for successful execution (Drejer, 2002).

Strategy formulation, implementation, and control are three distinct phases of strategic management. According to strategy scholars (such as Thompson & Strickland, 2003; Lynch, 2006; Mintzberg, Lampel & Ahlstrand, 2008), this involves the situational analysis of internal, external, micro, macro, industry, competitor, client and other relevant areas of strategy management. According to Lynch (2006), after the formulation of the strategy comes the setting of objectives and the crafting and implementation of the strategy. According to Jansen Van Rensburg (2016), as found in the theory of strategic management, this is a simplified description of the basic approach of most strategy theories and strategy formulation.

Strategic management is not a linear process in the current environment. Jansen Van Rensburg (2016) states that it involves a range of iterative planning and re-planning, actions and ongoing decisions. The author further says that some of the phases can begin simultaneously and, after the goals have been established, these can be revisited and adjusted until the desired outcome is realised. Built on several assumptions, the process can only be tested by implementation (Jansen van Rensburg, 2016).

Increasing accuracy in the direction that needs to be followed will be realised through learning by experience. Stacy (2003) and Kaplan and Norton (2007) assert that as a response to changes in the environment, adaptation of the strategy will be continuous in order for strategy to be implemented. This iterative process is key for implementation. Simply put, implementation is thus an erratic process of sensing changes, having feedback systems, and interpreting, analysing and adapting accordingly in a continuous loop (Kaplan & Norton, 2007). A different approach is therefore needed to make sense of this complex and difficult reality. The point of departure for this study is to explore the implementation from a micro-practice point of view, that is, the practitioner's way of implementing strategy, as well as from the process point of view, namely, the organisational processes.

2.4.2.1. Content research

During the 80s academic research was mainly focused on the content of strategies, together with the rise of classical strategy (Rajagopalan et al., 1993). In their definition of strategy content research, Fahey and Christensen (1986) posit that this encompasses the content of strategy. They go on to assert that the central focus of content research seems to be the identification of cause-and-effect relationships in a similar vein to the natural sciences. The logic – "If a manager finds conditions X,Y and Z, then he is most likely to be more effective if he follows strategy A than B" (Glueck cited in Fahey & Christensen, 1986, p.169) – highlights this cause-and-effect relationship which is presented in Figure 2.1. According to Doz and Chakravarthy (1992, p.6) and Mellahi and Smini (2009), strategy research could be divided into two subfields of strategy research; content research, focusing "exclusively on what strategic positions of the firm lead to optimal performance under varying environmental contexts", that is, normative directives and methods for strategy formulation and process research, which is "concerned with how a firm's administrative systems and decision processes influence its strategic positions" i.e., how strategy work is organised within an organisation. The authors view these two subfields as serving improved performance, but with each one approaching the issue from a different angle. A third prominent subfield of strategy research is strategy-as-practice, a view "that considers strategy not as something that an organisation has, but rather as something that people do" (Johnson et al., 2003, 2007; Rouleau, 2013), that is, how strategy work is experienced inside organisations. Generally, the content research side excludes implementation issues and tends to take a strong top-down, purely content-focused stand on strategy. This view is advocated by the best known scholars such as Chandler (1962), Andrews (1971) and Ansoff (1969).

Figure 2.1: Strategy content research paradigm.



Source: Fahey and Christensen (1986, p. 170).

Several authors (e.g., Mintzberg et al., 1998; Kiechel, 2010; McKenna, 2012) argue that the emergence and growth of strategy consulting firms is a factor that contributed to the development of strategic management during its formative period. Similarly, as observed by McKenna (2012), management theorists have been influenced by management consultants who sold the new discipline to their clients. Building on strategic management insights, consulting firms etched their brands into the strategy vocabulary, namely McKinsey's three horizons model, and the Boston Consulting Group experience curve and matrix. This interpretation is corroborated by Hayes (1992) when he acknowledges that these seemingly simple concepts, which were generally scorned by academics, are established in the business school curricula.

In the same vein, the rise in interest in economic based theories of strategic management continued to thrive following their initial popularity. In the 80s for instance, RBV grew and reemphasised the primacy of this stream of research. The conventional conceptualisation of strategy with its focus on the external environment, combined with the assumption that organisations within an industry are identical in terms of the resources they control and the strategies they can pursue (Barney, 1991), did not sit well with all strategy researchers. Guided by dissatisfaction with earlier views, the RBV investigated the organisation in terms of its internal resources rather than its products and markets (Wernerfelt, 1984). Although slightly different in viewing the strategy process, Prahalad and Hamel's (1990) study of core competencies, and the related dynamic capabilities (Teece & Pisano, 1994), added to the RBV perspective. However, it must be highlighted that RBV differed subtly in their way of viewing the strategy process. Mintzberg et al.(1998) indicates that in general the RBV stressed that these capabilities were in the evolution of the organisation whilst on the other hand, core competencies and dynamic capabilities were considered to be developed through a process of strategic learning.

By focusing on the establishment of a direct relationship between a firm's resources and its competitive advantage it seems that the RBV minimised the need for strategy. A premise of the RBV

is that managers simply obtain resources and develop an appropriate organisation through which to create sustainable competitive advantage (Kraaijenbrink, Spender & Groen, 2010). In fact, Barney (1991) makes the assertion that the imitable nature of strategy tools and planning processes meant that they offered little chance of providing competitive advantage.

Through classical, rational, economic-based planning perspectives, strategic management rapidly obtained a position of influence within academia (Mintzberg, Quinn and Ghoshal 1998). This approach, was however, far from universally embraced as a number of researchers questioned this view of strategic management. Hayes and Abernathy (1980) challenged this "new managerial gospel" as a major cause of the US economy decline. These authors' findings demonstrated that organisations had a preference for analytical detachment and short-term cost reduction over hands-on insight and long-term orientation. Conversely as Knight and Morgan (1991) suggest, even though the strategy view of what the world being embraces was not inevitable, in contrast a powerful managerial discourse related to power and identity. To this end, several scholars (e.g., Mintzberg, 1994; Prahalad and Hamel, 1994; Barry and Elmes, 1997) called for the field to be reconceptualised. In response, new schools of thought began to develop within academia which addressed the perceived limitations of the paradigm.

The new strategic management perspectives that developed as a result are referred to as strategy process. Strategy is not static and rarely conforms to rational decision-making models, according to the process view of strategy (Mintzberg & Waters, 1985; Mintzberg, 1990; Sminia, 2009). Process research focuses on how strategy is formed. From this a conceptual view of strategy emerged that portrays strategy development as a meandering process influenced by a wide range of external, individuals and organisational phenomena (Sminia, 2009). Hutzschenreuter and Kleindienst (2006), in their strategy process literature review, observe the strong imbalance favouring research focused on strategy formulation with implementation reduced to operational afterthought.

The content theme is commonly taught in business schools while implementation issues are included as a main part of strategy work in both process and practice research. As this research will look into strategy implementation, and more precisely at the processes and practices of the differentiated workforce, the study will adopt a process and practice research perspective. Process research is discussed next.

2.4.2.2. Strategy process research

An attempt will be made to provide an outline of the key main arguments within the broad strategy process area of research. This is necessary in order to investigate, and later to critique, the

distinctiveness of the SAP perspective compared to process studies. Bower and Doz (1979) led the way for other process scholars to define the process school of research. The authors consider strategy as the product of three distinctive processes: 1) the political processes by which the power to influence purpose and resources is shifted; 2) the cognitive processes of individuals on which understandings of the environment of strategy are based; 3) the social and organisational processes by which perceptions are channelled and commitments developed (Hax & Majluf, 1988). Building on previous research, Van de Ven (1992) provides a definition of what process research entails. Overall the author identifies three ways in the literature in which strategy process is often used: 1) as logic used to explain a causal relationship in a variance theory; 2) as a category of concepts that refer to actions of individuals or organisations and 3) as a sequence of events that describes how things change over time. Previous research by process scholars (Burgelman, 1983; Pettigrew, 1987) investigated a wide range of processes, using a variety of perspectives: change (Pettigrew, 1985; Barr, Stimpert & Huff, 1992), innovation (Van de Ven, Angle & Poole, 1989), resource allocation (Bower, 1970), knowledge (Pisano, 1994), technology (Orlikowski, 2000) and narratives (Pentland, 1999). The following paragraphs provide a brief overview of the main areas that process scholars have focused on. By doing so, the principal insights but also limitations of the strategy process research tradition are revealed.

a) Decision making

Interested in decision making within organisations has been an area of interest to process scholars. Research in this area looks at those infrequent decisions made by the managers of an organisation that impact on organisational business performance and survival. In order to analyse decision-making, scholars have focused their interest on human behaviour. As a result, different choice paradigms have emerged (i.e., rationality and bounded rationality, politics and power) (Pettigrew, 1973; Eisenhardt & Zbaracki, 1992). Eleven strategy-making process dimensions including, adaptiveness, analysis, expertise, integration, innovation, and risk taking were identified by Miller and Friesen (1978). In a similar study, Fredrickson (1986) proposed the following dimensions as vital organisational processes: pro-activeness, rationality, comprehensiveness, risk taking, and assertiveness. Other scholars see organisational processes from which strategic decisions develop as finite. Strategy problem-solving may be conceived as a group-level or organisation-level process that encompasses the range of activities firms engage in to formulate and enact their strategic mission and goals. These activities include analysis, planning, decision-making, strategic management, and many aspects of the organisation's culture, shared value system and corporate vision (Hart, 1992). However, despite the fact that these areas emphasise the behavioural aspects of strategists as action generators, the resulting cognitive studies are poorly linked with the on-going strategy process. This link is important

since the strategists' ability to influence the strategy process of the firm is a function of shaping the very process of strategy as practice. As a result, there is a significant gap between descriptions of managerial cognition and empirical evidence on how, when and why strategists are indeed active in the making of strategy.

The strategy research area has provided a number of contributions to the field of strategic management. Back in the 1990s it was recognised that:

> Much of strategic management writing, like a good deal of the social sciences, is an exercise in comparative statics. Cross-sectional research designs are combined with the static metaphors of contingency thinking to analyse the fit between the positioning and resource base of the firm and its performance in different environments (Pettigrew, 1992, p.5).

In an era, when most of the mainstream strategy research tried to explain strategy development in linear terms, using the organisation as the principal level of analysis, process scholars highlighted the importance of looking in detail within the organisation and examining the actors involved in the strategy process. As Johnson et al. (2003) point out, the process school has irrevocably opened up the black box of the organisation. Instead of seeing strategy as a macro-strategy problem detached from the internal dynamics of the organisation, it is now recognised as an organisational phenomenon.

Another contribution of strategy process studies was to highlight the importance of the various levels of context in which organisations are embedded. According to process scholars (such as Pettigrew, 1992; 1997; 2003; Thomas, 2001), the context in which sequences of actions, incidents and activities are situated is very important. Extending this view, Van de Ven (1992) and Eisenhardt and Bourgeois (1998) say this is because the inner and outer context allows a much richer appreciation of many factors impacting the strategy process. Pettigrew (1997), continuing with this line of reasoning, goes even further by claiming that context is a source of opportunity for managerial action and not just a source of constraint. In this case, "the need is to explore the cumulative and unpredictable effects of the interplay between managerial decisions and changing contexts" (Pettigrew and Whipp, 1991, cited in Paroutis, 2006 p. 23). As a result, compared to other mainstream strategy studies, the investigation of the ways and reasons why different contexts influence strategy processes becomes an important distinguishing feature of process studies (Pettigrew, 1997). However, the strategy process perspective has a number of limitations, notwithstanding the contributions mentioned above.

b) Comments on process research

Strategy process researchers tended to trade generalisability for a richer understanding of a small number of chosen situations when scrutinising closely dominant methods and motivating questions (Huff & Reger, 1987). The recent use of qualitative methods (Ghoshal, 2005) has been embraced by notably SAP researchers who have a strong qualitative focus (Vaara & Whittington, 2012). As the field searched for institutional legitimacy within the university environment, it is noted that Huff and Reger's (1987) work was completed when quantitative analysis was still dominating strategic management research (Grant, 2008; Hambrick & Chen, 2008).

The emergence of the SAP perspective has been influenced heavily by the strategy process tradition, together with the practice turn in social sciences. Even though SAP scholars like Chia and MacKay (2007), and Carter, Clegg and Kornberger (2008) contest this position, SAP sits outside the dominant strategy position. According to Golsorkhi, Rouleau, Seidl, and Vaara (2010), Whittington's seminal article (1996) pioneered the young SAP field as a sub-field within strategic management. SAP researchers see strategy not as the property of an organisation but rather as something people do. In their highly influential article, Jarzabkowski and Spee (2009) corroborate this interpretation. The authors highlight that SAP researchers seek to bring people, the human actors, back into focus, in contradistinction to strategy process research which groups people as collective bundles of competencies. Whittington (2006) suggest that a closer look at strategy practitioners would increase an understanding of what the actors actually do in practice. Hence a comprehensive review of the SAP perspective will follow later in this chapter as it is a stated goal of the SAP research agenda.

According to Whittington (2003), and Jarzabkowski and Spee (2009), lack of inclusion of people as individuals is its particular criticism of the dominant strategic paradigm. Although particular streams of process research focus on people as individuals, this is often aimed at the upper echelons (CEOs and top management). Over and above conforming to a rational ideal, as identified by Whittington (2007), strategy practitioners are first of all people, individuals with emotions, desires and ideas.

2.4.2.3. From formulation to implementation

Formulation and implementation of strategy is another area within the strategy process research tradition. While implementation studies (Galbraith & Nathanson, 1978; Bourgeois & Brodwin, 1984) focus on how strategic objectives are accomplished, studies on the formulation processes (Bower, 1970; Mintzberg, 1978) focus on how strategists conceive, create and craft strategy. A small number of studies have also considered formulation and implementation together. For example, Andrews

(1971) and other researchers (Stonich, 1982; Littler, 2000) have recognised the interactive nature of the relationship between strategy formulation and implementation. However, many of the formulation-implementation studies can be characterised by atemporality and an insensitivity to the dynamics of managerial actions. For instance, implementation is treated as synonymous with control or execution of a strategic plan (Hrebiniak & Joyce, 1984; Kotler, 1984; Floyd & Woolridge, 1992). Additionally, in these studies the main level of analysis is the organisation. Scholars are primarily concerned with strategy within the macro premises of the organisation rather than the micro perspective of the strategists' thinking and acting. This view will be developed further in section 2.5.3.

Maritz (2008), in explaining the convergence of the formulation vs. implementation duality, points out that the problem may lie deeper in the very separation of the two streams. Using a construction analogy, Maritz (2008) indicates that unlike buildings, strategies are never completed. That is, they are a work-in-progress and hence always changing. Furthermore, their structures have to be fluid and their walls permeable. TMT cannot, therefore, hand formulated strategies to the organisation for implementation in the same way as architects hand over plans to builders for construction. Real strategies are not about abstract strengths, weaknesses, threats and opportunities, but rather about dynamic markets, living customers and evolving technologies (Maritz, 2008).

2.4.3. Limitations of the process tradition

A number of scholars have argued that "process researchers haven't dug far within" the black box of organisations (Johnson et al., 2003, p.11). These scholars argue that questions around what managers actually do still remain largely unexamined (this has already been discussed in 2.4.2.3 but it appears here from a slightly altered perspective). As Johnson et al. (ibid.) stress:

> Process research might tell us a good deal about the overall processes of organisational decision-making and organisational change, but it has been less interested in the practical activity and tools necessary to make these processes happen. What managers actually do, and with what techniques, is left obscure.

According to Pettigrew, Thomas and Whittington (2002), strategy process humanises the field of strategic management by placing the human actors that take part in strategy making and implementation centre stage. As previously indicated, managers functioning at upper hierarchical levels have been central to the notion of strategy process (Finkelstein & Hambrick, 1996; Van de Ven, 1992). Hence, as identified by Hambrick (1989) and Pettigrew (1992), often the actions of TMT

determine the way strategy is made and executed. Traditionally, there has been less interest in how groups of individuals across organisational levels act and interact during the strategy process. For instance, a number of studies have highlighted the role of middle management during the strategy process (Balogun, 2003; Balogun & Johnson, 2004; Floyd & Lane, 2000). As Floyd and Wooldridge (2000) suggest, organisations seem to expect strategic thinking and initiative from middle-level managers, yet the micro-level actions and interactions of these groups of actors across the firm have remained, to a large extent, unexamined.

Another limitation of the process area that strategy-as-practice scholars use to legitimise the existence and contribution of their research, is their tendency consider it the opposite of content research. As Johnson et al. (2003) note, there is too sharp a dichotomy between process and content. Strategy-as-practice scholars therefore argue that there is a potential for research that focuses on how strategists influence, not only the process of strategy, by taking decisions or solving strategic issues, but also the content, tools and methodologies through which actions and ideas evolve. Johnson et al., (2003) also question the value of practical implications derived from process studies, and the fact that, too often, process research lacks an explicit relation to strategic outcomes.

2.5. STRATEGY IMPLEMENTATION

2.5.1. Background

In emerging economies such as South Africa a knowledge gap exists in strategic practices. Research has been published in South Africa on, variously, middle-manager practices at a university (Davies, 2013), the SAP view in the South African Defence Evaluation and Research Institutes (Jansen van Rensburg, 2016), the SAP perspective within an engineering organisation (Sithole, 2011), the SAP business rescue (Pretorius, 2013), and an ICT analysis view (Govender & Pretorius, 2015). Interest in the area of SAP research is limited to who the practitioners are, what tools and methodologies they use, how they are used and where these tools and methodologies are obtained. Whittington (2002) suggests that a practice perspective can be a means to investigate and shed light on these gaps. SAP is concerned with what strategists (the differentiated workforce in this context) do, and it can therefore be used as a lens to investigate what strategists do (Seidl & Whittington, 2014; Mantere, Aula, Schildt & Vaara, 2013; Vaara & Paderson, 2014). No specific studies on the role of the differentiated workforce during the implementation of strategies, could be found relating to the insurance business sector in South Africa. Therefore this field is open for further investigation.

The aim of this section of the literature review is to confirm the link between formulation and implementation of strategies that was discussed in 2.4.2.3. Jansen van Rensburg (2016) corroborates this interpretation by emphasising that formulation and implementation must be seen as an integrated function of strategy implementation. Building on the work of Jansen van Rensburg (2016) it is therefore important to look at what was done previously in terms of the formulation-implementation link and connect that to the gaps relevant to this study.

2.5.2. Defining strategy implementation

Within the literature on management the terms "strategy execution" and "strategy implementation" are often used interchangeably. In this research, both terms are considered as synonymous, following Li, Guohui and Eppler's (2008) synthesis of the implementation literature. According to Fourie (2007), the term strategy implementation is more often used in scholarly academic literature whereas strategy execution is commonly used in the business world.

As identified by Noble (1999), the concept of strategy implementation involves different views adopted by diverse scholars in an endeavour to define the concept. Li et al. (2008) further support other previously cited scholars who have concluded that there is no generally common definition of strategy implementation. A brief introduction of the competing streams and the interesting distinctions among them can be made but a detailed discussion of the origins of these various perspectives is beyond the scope of this work. This will allow us to show how strategic management literature employs alternative notions indiscriminately, thus leading to unnecessary conceptual confusion. An eclectic review of the literature illustrates three distinct conceptions of the term strategy implementation. That is, a process perspective, a behaviour perspective, and, lastly, a hybrid perspective (Li et al., 2008). Strategy implementation within a process perspective is a carefully planned sequence of consecutive steps while strategy implementation from a behavioural perspective is a series of more or less concerted actions (Li et al., 2008). Some scholars combine the process and the behaviour approaches to form a hybrid perspective. Table 2.2 details some of the key concepts highlighted in these definitions.

Table 2.2: Definitions of strategy implementation

Perspective	Definitions
Process	Implementation is the process that turns plans into action assignments and ensures that such assignments are executed in a manner that accomplishes the plan's stated objectives. Kotler (1984) cited in Noble (1999b). Implementation is a process that takes longer than formulation (Hrebiniak, 2006).
Behaviour	Implementation is a series of interventions concerning organisational structures, key personnel actions, and control systems designed to control performance with respect to desired ends. Hrebiniak & Joyce (1984) cited in Noble (1999b). Implementation designates the managerial interventions that align organisational action with strategic intervention. Floyd & Woolridge (1992a) cited in Noble (1999b).
Hybrid	In other instances, implementation is viewed as an action oriented process that requires administration and control. Govindarajan (1988) cited in Sashittal & Wilemon (1998).

Source: Li, Guohui and Eppler (2008).

A common understanding among the various definitions is that despite their relative uniformity, these findings are in accord with the dominant strategic management paradigm discussed earlier in the chapter. Taking this as a starting point, it is clear that several definitions stress the role of top management and only a few focus on the external environment. Perhaps, to complicate the matter further, not a single definition mentions the workforce, that is, the employees and their crucial role in implementation.

Taking all these into consideration, we can define strategy implementation as an iterative, complex and dynamic process. This process is made of a series of decisions and activities by both managers and employees. And to turn strategic plans into reality to achieve strategic objectives, they are affected by interrelated internal and external factors (Li et al., 2008). This definition is acceptable for the purposes of this study.

Building on the traditional strategic management literature, Noble (1999) suggests a more cohesive definition. The author sees strategic implementation as the communication, interpretation, adoption

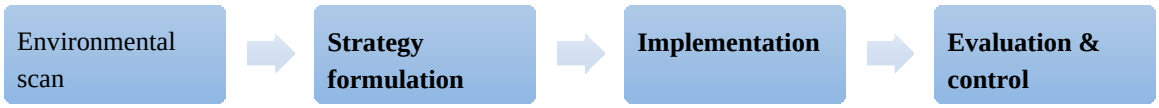
and enactment of strategic plans. This is in accord with a behavioural perspective (Li et al., 2008), that can be useful in investigating the strategy-making of the workforce in strategy implementation. However, this definition can be seen as limited in that it does not consider those actions that lie outside of the strategic plan but which form the strategic purpose. Therefore, a changed version of Noble's definition is used to describe implementation within this study: the communication, interpretation, adoption and enactment of strategic plans and purposes.

There is not always a clear chronology between formulation and implementation as the aforementioned differentiation between strategic plans and purpose shows. Several scholars have pointed out the ubiquitous nature of implementation (Nutt, 1986). These overlapping and parallel stages can cause problems for the researcher. For this reason, and for the purposes of clarification, these phases will be simplified into a more definitive and step-by-step process than it really is, since as has been repeatedly stated in this chapter, both implementation and the outcome of strategy are considered to be part of the implementation process. This should not have any relevance on the quality of the research.

2.5.3. Strategy implementation and the strategic management process

According to Ehlers and Lazenby (2019), the process whereby all organisational functions and resources are integrated and coordinated to implement formulated strategies could be defined as strategic management. Earlier, the duality of strategy, namely its formulation and its implementation, was highlighted by Ansoff (1969). The vexing question in this regard is "what constitutes the strategic management process?" Figure 2.2 presents the basic elements of the strategic management process comprising environmental scanning, strategy formulation, strategy implementation and evaluation and control.

Figure 2.2: The basic elements of strategic management process



Source: Trainer (2004).

From Figure 2.2 it is evident that strategy implementation is a central part of the strategic management process. Strategy implementation is often conceptually viewed as a phase in the strategic management process that follows formulation, but seen as separate from formulation (Campbell & Garnett, 2000). However, in practical terms, both formulation and implementation are often intertwined, especially

in the volatile contemporary business environment. According to Freedman and Tregoe (2003), effective top management supports successful strategy implementation by addressing implementation issues during the formulation of strategy. In this regard, implementation risks could be mitigated if strategy formulation and control are factored into the problems connected to implementation.

Whereas mainstream literature is guided by conventional views that conceptualise strategy implementation as a separate stage of the strategic management process (Ansoff, 1965; Jauch and Glueck, 1988; Wheelen & Hunger, 2015), a growing number of scholars, in contrast, have expressed a research-based view based on the way in which strategy actually develops or emerges (Pettigrew & Whipp, 1991; Hrebiniak & Joyce, 1984).

In essence, implementation has to do with putting plans, actions and execution into practice within the context of strategic management. It is assumed that the objective of implementation is to ensure that the objectives and goals are met on time and as effectively as possible. It includes, among others, the activities, choices and allocation of resources used to execute the given strategy. As other authors have reported, implementation, as the final part of strategic management, is not isolated from the formulation phase (Okumus, 2001; Hrebiniak, 2006; Ogden & Fixen, 2014). In the dynamic and hyper-competitive environment of today, savvy executives realise that implementation and formulation are interconnected and regularly review both phases to keep pace with the changing environment. In his now famous article, Bigler (2001, p.3) elevates the execution notion by suggesting that "strategy implementation will emerge as one of the critical sources of sustainable advantage in the twenty first century". From a process perspective, it would seem that implementation follows formulation. That is, action separate from formulation, begins once the strategy has been selected and evaluated.

Thompson and Strickland (2001) assert that the task of successful implementation of strategy is the most time-consuming and complicated task of strategic management. Yukl and Lepsinger (2007) aptly emphasise the importance of implementation when they state that there is very little value in a good strategy that is not implemented effectively. More recent research points out that the most significant challenges in the field of strategic management are strategy implementation problems. It is also apparent that the high failure rate of organisational initiatives in a dynamic environment is primarily owing to poor implementation of strategies, not strategy formulation problems (Kaplan & Norton, 2001; Allio, 2005; Sioncke & Parmentier, 2007; Pryol, Anderson, Toombs & Humpheys, 2007; Mistry, 2014). It can therefore be safe to say that most of the literature scanned for this literature review focuses on the formulation of strategy even though implementation is an integral part of the strategic process (Aaltonen & Ikavalko, 2002; Yukl & Lepsinger, 2007; Sioncke & Parmentier, 2007;

Whittington, 2002; Jarzabkowski & Spee, 2009; Malek, 2008; Markiewicz, 2013; Pella, Sumarwan, Daryanto & Kirbrandoko, 2013; Ogden & Fixen, 2014).

It is noteworthy that a study on achieving operational excellence by means of strategy implementation done by Economic Intelligence with 276 senior operations executives from the North America Unit in November 2004 points out that 57% of firms failed to implement business strategies (Allio, 2005). Another example is the research of The Economist (2013), which showed 44% of the surveyed strategies have never been implemented by manufacturing organisations. Hence it is not surprising that significant difficulties are often met in the implementation process after a comprehensive strategy has been formulated (Bigler, 2001; Faull & Fleming, 2005; Allio, 2005; Hrebiniak, 2006; Malek, 2008; Markiewicz, 2013; Pella et al., 2013). According to Beer and Eisenstat (2000), and Raps (2004), the lack of an integrated viewpoint is the reason for the low success rate. To elaborate briefly, the available literature tends to focus on particular components within strategic implementation such as strategic control, the role of top management, organisational culture, middle management commitment, etc. This debate and the tenets thereof are furthermore explicated in various academic and organisational fields (Neely, Mills, Platts, Gregory & Richards, 1994: Noble, 1999), and are summarised eloquently by Atkinson (2006) when concedes the lack of theoretical frameworks as a "somewhat incoherent knowledge base" with "many important gaps remaining to be filled in." In order to fully understand strategy implementation, Atkinson (2006) and Raps (2004) insist that a comprehensive representation derived from varied implementation elements is required. Indeed, without a coherent and aligned implementation, Aaltonen and Ikavalko (2002) have re-emphasised that even the most superior strategy would be useless.

Implementation of business strategies is influenced by many factors. The most common reason why implementation is successful or not depends on the mix of management interventions of these diverse variables. Strategy implementation requires mechanisms and tools that can sense and react to these environmental factors, especially in today's shifting, competitive and often turbulent business environment. Thus, further research in the field of implementation is imperative for organisational renewal and survival (Okumus, 2001; Grant, 2003; Kaplan & Norton, 2005; Akan, Richard, Helms & Samuel, 2006; Atkinson, 2006; Smith, 2009; Sorooshian, Norzima, Yusof & Rosnah, 2010; Rose & Cray, 2013; Ogden & Fixsen, 2014).

The successful implementation of an organisation's strategy is key for the optimal performance of the organisation (Noble, 1999). However, as was identified previously, several scholars such as Mintzberg (1978) and Nutt (1987) claim that strategy implementation is far from straight-forward, arguing that many strategies fail to be implemented and have to be substantially adjusted. Taking this

logic further, Skivington and Daft (1991) hold that more importantly, strategy implementation requires complex interaction processes between managers and the workforce and does not merely involve adjusting organisational structures and control systems.

In many organisations this complex interaction focuses mainly on the administrative and strategic functions of HRM. This could take the following form: 1) Consolidating lower level goals that translate long-range strategic goals into short-term objectives; 2) Developing operational strategy-supportive policies and procedures; 3) Building a structure that systematises activities, responsibilities and interrelations in a way that fits with the strategy; 4) Allocating resources in a way that ensures that units charged with performing strategy-critical activities and implementing new initiatives have the skilled workforce and funds to succeed; 5) Motivating the workforce, and modifying job behaviour to fit strategy requirements of successful strategy implementation (Drucker, 1974; Steiner, 1979; Thompson & Strickland, 2001).

Many authors (such as Bigler, 2001; Faull & Fleming, 2005; Allio, 2005; Aaltonen & Ikavalko, 2002; Hrebiniak, 2006; Malek, 2008; Markiewics, 2013; Pella et al., 2013) contend that overall there is agreement in the literature on strategy implementation failures and efficiencies and, importantly, the inability to manage these changes effectively. It also appears from the literature that there are few studies done in the South African business context. Secondly, there is also a gap between the actions of practitioners and their success with interventions. As the discussion thus far suggests, part of what is needed involves how the differentiated workforce integrates vertically between different methodologies, tools, material matters, and different strategic initiatives, and horizontally between formulation and implementation (Hrebiniak, 2006; Ogden & Fixen, 2014). The question is: How are these used and executed during the practice view and how is it this process defined in terms of formal and sound research?

The next section looks at the theory and literature on the subject of strategy implementation. For the purposes of this study this is divided into four major streams identified from the extant literature.

2.5.4. Theoretical mainstreams

As was previously mentioned, strategy implementation is a core part of the strategic management process. Strategy implementation theories, constructs and tools used during the past few years came from different schools of thought while contributions in the field continue to develop through research and theory development (Jansen van Rensburg, 2016).

To complicate the matter further, at the core of successful strategy implementation lies a deep understanding of how to fine-tune an organisation through better organisational design, organisational processes, resources and the motivation of the workforce. On the basis of such a perspective, the literature has been synthesised into four main streams in order to develop a new perspective on the context of this study.

The following four main theoretical streams as proposed by Jansen van Rensburg (2016) were identified:

- Strategy implementation as architecture;
- Strategy implementation as planned change;
- Strategy implementation as process; and
- Emerging views on strategy implementation with focus on practitioner's practices.

These streams are discussed in the next section.

2.5.4.1. Implementation as architecture

Within this context, implementation as architecture means the architecture of the organisation which is thereby able to implement strategies effectively in order to function effectively. In fact, all internal functions, processes and organisational structures, according to Smith (2010), need to fit in order for the organisation to implement strategy successfully. A seminal argument offered by Floyd and Lane (2000) and supported by Getz and Lee (2011) is that, to ensure that implementation is done effectively, the management of strategy implementation requires well-designed and coordinated management processes, structures and resources as enablers during the implementation process.

a) Architecture models

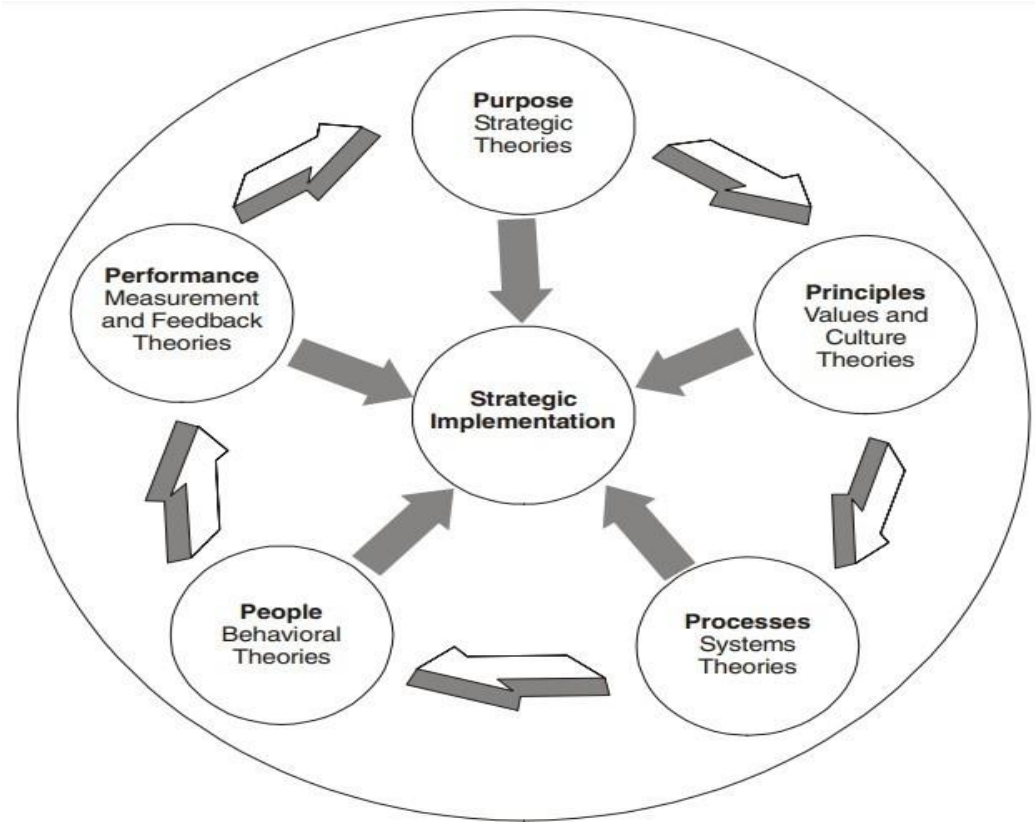
In their original work, Waterman, Peters and Phillips (1980) found that strategy implementation is a relationship between several factors including the following: architecture, structure, systems, style, staff, skills and subordinate goals. The McKinsey 7-S model was developed by McKinsey and Company and it comprises strategy, structure, systems, staff, skills, culture and shared values.
According to Palatkova (2011), these factors are effective for strategy implementation. Another model that supports strategy implementation as the organisational architecture context changes is the Galbraith Star Model (Kesler & Kates, 2010). The 5Ps model is presented in detail to explain architecture model.

b) The 5Ps model of strategy implementation

Figure 2.3 presents the relationship among the five elements of the 5Ps model. According to Pryor et al., (2007) the various functional areas involved from a strategic and tactical view are included. They further indicate that the model is a universal depiction and is applicable to the management of an entire organisation across industries. The first of the five Ps is Purpose which includes mission, vision, goals and objectives, strategy development and implementation, and measurement and feedback. It concerns strategic direction. Principles are made of core values and operating guidelines. Core values are what the organisation focuses on with passion and serves as the basis for operating guidelines. Processes are the systems and structure of the organisation (how work gets done).

The People are the individuals and teams who do the work of management and the workforce whose actions and ideas drive the success or failure of the organisation. Performance includes measurement and results as well as the feedback system. The Purpose (strategic direction) impacts the Principles and Processes, which influence the People who accomplish Performance results. As the Purpose of an organisation is being developed, organisational leaders should also define their core values and operating guidelines (the principles elements of the 5Ps Model). If they care about innovation, organisation leaders should empower their People and involve them in managing their Processes, measuring, tracking Performance, and making improvements based on Performance results.

Figure 2.3: The 5Ps Paradigm of strategy implementation



Source: Pryor et al. (1998, p.8)

Even though the individual elements and sub-elements of the 5Ps Model are significant as specific components, their integration and alignment are even more pivotal for strategy implementation (Beer & Eisenstat, 2000; Raps, 2004).

The overall purpose of this study is to explore the agency of the differentiated workforce, namely, the People in the 5Ps Model. Using the SAP lens, the People component of the model will be elucidated and expanded on with the appropriate internal facets in this chapter.

c) People

Michlitsch (2000) posits that strategy implementation is best realised through high performing people. Within the 5Ps Model, People include all the stakeholders such as employees, customers, suppliers and others. In this study, People will focus on the differentiated workforce. To achieve its Purpose, People are the process owners who perform work that is consistent with the Principles and Processes of an organisation. Before People can be consistently effective Purpose, Principles and

Processes must be aligned. This fit is premised on the view that strategy drives the structure in which People operate to establish Performance. The cumulative impact of this view is apparent. Consistent with this perspective, scholars such as Floyd and Wooldridge (1992) recognise and expand the role for non-managerial level actors in strategy development and implementation. The link to the human resources component is missing in many organisational implementation endeavours (Martell, Gupta & Carroll, 1996; Rousseau & Rousseau, 2000), although both academic and business communities have long recognised the importance of aligned human assets to successful implementation (Raps, 2004).

Overall, Pryor et al., (2007) indicate that, as process owners, People are responsible for ensuring that a process performs as expected. According to the 5P's model, the process owners are, for example, accountable to customers and suppliers for the processes they own, and they are empowered to improve these processes. Mushin and Koh (2001) claim that depending on the individual, team and organisation these levels of ownership and empowerment are dynamic and can increase or decrease. For example, Merill (1997) highlights the significance of process ownership by discussing what happens in its absence. Building on these theoretical arguments, Copacino (2003) observes that without clear ownership both the internal and external stakeholders fail to communicate with each other. In fact, the model postulates that the People who implement tactics cannot deliver the level of quality expected by process stakeholders without this strategic consensus.

For developing the management perspective and teamwork that is required for success, the concept of People in terms of process ownership is critical (Floyd & Wooldridge, 1992). Humphreys (2005) concludes that for many organisations, the designation and development of process owners is a difficult step. In his earlier studies, Humphreys (2003) notes that the dominant TMT view squanders the significant contributions of the employees who are the principal implementation actors (Becker, Huselid & Ulrich, 2001). In sum, if organisations understand the comprehensive approach of People, and can align them to Purpose, Principles and Processes, they are likely to realise Performance superiority.

Perhaps it should be highlighted that while the upper echelons perspective has stimulated coherent and cumulative research in the organisational sciences (Hambrick and Mason, 1984), in contrast, identifying mid-level professionals and the most strategically influential in an organisation is more problematic. In support of this view, Pappas and Wooldridge (2007), argue that understanding why some mid-level professionals and middle managers are involved in and influence the strategy development process more than others remains an important research issue. Lastly, understanding and identifying outcomes relevant to the middle management approach is more problematic than

identifying outcomes relevant to top management decisions, even though both views make linkages to outcomes affecting the whole organisation. In fact, TMT research centres on such effects, while in contrast, middle management and mid-level research is concerned with intermediate outcomes such as subunit performance and initiative development.

Given this complexity, research from a people management perspective has addressed a wide range of issues and used a variety of methodological approaches. Wooldridge, Schmid and Floyd (2008) note that this has led to a fragmented stream of research whose cumulative impact is hard to discern. By its nature, implementation research is eclectic, interdisciplinary and especially focused on integration (Hrebiniak, 2006). That is, while it does not reduce the significance of formulation, it seeks to contribute to the furtherance of complementary aspects of research concerning both implementation and formulation.

2.5.4.2. Implementation as planned change

The use of planned change management is the second stream of theory for strategy implementation. An effective change management process is required for effective strategy implementation (Weller, 2010). The author states that this has a direct influence on strategy implementation and organisational architecture.

As change is inevitable in the business environment, Gans (2011) maintains that, through the use of a change, management process business strategy needs to adapt to changes. According to Gans (2011), the process starts with an assessment of the impact of change through training, communication, expecting resistance, recognising and rewarding success, and on-going monitoring and adjusting progress.

There are several models that have been developed in this field (Hughes, 2007; Whelan-Berry & Somerville, 2010; Van de Ven & Sun, 2011) including Kotter's model (1995; 1996). Eight steps for change management are identified in Kotter's model. These are creating a sense of urgency for the intended change, creating a guiding coalition, developing a vision and strategy, communicating the change vision, empowering broad-based action, generating short-term wins, consolidating gains and producing more change, and anchoring the new views in the corporate culture. Despite its lack of empirical research, this model is widely used (Appelbaum, Habashy, Malo & Shafiq, 2012).

Also used to manage change needed in the implementation process is Lewin's classical three-step model as well as his force field analysis model. When describing the process of change, Lewin considered three steps: unfreezing the current level, changing or moving to the next level, and freezing at the new level. The first level includes the identification of the situation to be changed. Strategies

are developed to strengthen the driving forces and weaken the restraining forces. It is during this phase that people in the organisation will be of value in realising the achievements of the organisation and begin to realise that change is needed.

In the second step which involves changing to a new level, and when the driving forces have overcome the restraining forces, actual change occurs. For implementing change a detailed plan is constructed. The change is stabilised at the new level within the organisation in the last step of the process, refreezing. According to Bozak (2003), although Lewin included the idea of permanency at this level, he did not imply immunity to future change. This model has been criticised for its simplicity and because it does not include transformational change (Burnes, 2004).

2.5.4.3. Implementation as process

According to Ikavalko (2005) and Hrebiniak (2006), implementation is the process of putting the intended strategy into action. This theoretical stream is about implementation of management process to execute strategy.

As previously noted, implementation is influenced by the process of managing change, the content of the strategy and the context of the organisation (Pettigrew, 1987). The author argues that the process of implementation may be more effective if applied in context and also if factors are interrelated and affect one another. The author further points out that it is accurate to suggest that "effective implementation of an average strategy beats average implementation of a great strategy every time". Often organisations fail to carry out their strategies to enhance implementation effectively. In their model for strategy implementation, Aaltonen and Ikavalko (2002) match the planned and the realised strategies with a view to reaching the organisational vision.

The authors contend that the components of strategy implementation, that is, communication, interpretation, adoption and action – are not necessarily successive and cannot be delinked from one another, therefore leading to an integrated approach. In support of this integrative process approach, Raps (2004) states that the four implementation factors he describes (culture, organisation, people and control systems, and instruments), must be seen and applied in an integrated way via an implementation process. Kaplan (2005) takes the Balance Scorecard further, noting that it complements the McKinsey 7-S model by creating a multi-dimensional approach that shows the interconnectedness and linkages between the constructs, ensuring effective implementation. In his now famous article, Hrebiniak (2006) extends this notion of strategy by suggesting that even though formulation and implementation are two different parts of the strategic management process, they are

interdependent on each other. Therefore, the planning and implementing processes must be integrated to ensure sound implementation.

2.5.4.4. Emerging perspectives on strategy implementation

There has been a growing momentum in thinking and interest in the micro view which is driven by an economic environment that with more mobile labour force, ubundance of information and open markets. Adaptation is the last theoretical stream. It implies and reflects a living system that recharges itself for turbulence and complexity, and adapts by learning. According to Johnson et al., (2003, p.4) "strategic innovation increasingly involves managers at the periphery, rather than just those at the centre". Furthermore, as a result of this continuous dynamic changes, the authors argue that strategy creation and implementation becomes an intergral part of organisational life to ensure competitive advantage and to this end, this is something in which more people within the organisation are involved, more often than ever before. Part of this mainstream is the SAP field, which will be discussed in more detail later in the next chapter. The issue here focuses particularly on individual practices as part of the SAP approach.

Although there are varied categorisations of strategy, e.g., strategic choice, cognitive, political and cultural views, the field has been dominated by choice theory, based on strong rational and analytical approaches (Child, 1972; Moore, 2001; Porter, 1980; Stacey, 2003). According to this view there is an objective pre-given reality that can be understood by a few rational actors. These actors have the ability to choose a cogent strategic business position and formulate the strategy which is then implemented. This is based on the ability to predict, forecast and optimise. This view continues to dominate the strategy perspective despite being subject to significant critique (Mintzberg, 1990; Mintzberg et al,, 1998, Mintzberg & Water, 1985).

The assumption of an environment that is predictable and knowable that underpins much of organisation theory and strategic management implies that step-by-step easy prescriptions can be given for engaging in strategy. We may conceptualise social systems in organisations as complex adaptive systems (CAS), by drawing on complexity theory. A major lesson for the field of strategy is that it is not possible to be outside the system and analyse the organisation and the environment, and formulate strategy. In fact, such a circumstance would make it impossible to come up with normative ideas on how to do strategy. Furthermore, it raises the question about agency, because, potentially, everybody does strategy. Jarzabkowski (2005) contends that this translates to strategy as a form of intertwined thinking-acting and is in harmony with the strategy-as-practice approach, which will be discussed later.

According to Stacey (2003), under conditions of turbulence and uncertainty, strategic choice approaches hamper strategy-making. Most contemporary organisations operate in such conditions and the problems are further compounded by globalisation and concomitant levels of integration and interdependence between markets, institutions, organisations and economies. Hence there is a need for alternative approaches to strategy that take cognisance of such dynamics and non-linearities. This in turn leads to further challenges that the strategic choice does not address adequately such as power relationships, bounded rationality, satisfying behaviour, and differing motivation, as human practitioners now become central. The concept of emergence and attempts by learning approaches to incorporate emergent strategy offers promise.

An organisation exists with multiple functions that are interconnected as a system within a complex environment. Essentially, these functions react randomly and continuously as well as amongst themselves to any variation in the environment. The organisation also adapts to certain variables on a continuous basis and acts as a living system. These interactions, interconnected and non-linear, are generic and highly adaptive, and in order to adapt to the sensitive environmental conditions, they receive constant feedback. It is vital to acknowledge that between the components in a system there are continuous interactions and that these interactions differ constantly. Within complex systems they adapt with speed to new conditions and there is constant feedback among the components. This is a metaphor that describes business as a complex adaptive system and explains the complexity of the business context. Management intervention is needed to create order and stability. In this case, organisations can only survive if they constantly react, sense, adapt and improvise to these changes. Several authors (Burnes, 2005; Stacey, 2003; 2005) argue that organisations need to implement structures, communication, policies and practices that will promote conditions of self-organisation.

In addition, the ongoing interaction between people in an organisation and between other organisations and the environment causes the change that requires problem-solving and that provides opportunities to excel. This interaction also creates a self-organised culture of learning and emergence (Glor, 2007). The environments are aligned by means of interaction and response. In fact, learning organisations develop the structure, culture and strategy in such a way to create optimal learning opportunities. Learning and emergence are some of the key success factors in adaptive systems. As a result, leadership plays an important role in such organisations (Torak, 2004; Stacey & Griffen, 2005).

Strategy implementation in the business environment, according to Jansen van Rensburg (2016), should be regarded as an integral part of an adaptive complex, dynamic system as was explained in the description of the scope of the intended study. Implementation takes place by means of intangible management interventions and processes (Becker, Huselid & Ulrich, 2001). Business actions are

investigated in this study by taking cognisance of the practices and processes that are implemented in a business management approach. Since implementation is an integrated component of all the functional areas of the management of the organisation, a holistic approach has been adopted for the design of the implementation frameworks. Moreover, as the situation and environment change the approach needs to be crafted, re-crafted, adapted and re-implemented, needing regular feedback to succeed. Strategy implementation will continue as neglected area of strategic management without these actions: feedback, adaptation, corrective actions and re-alignment (Jansen van Rensburg, 2016). Creating environments to ease implementation, or finding ways of doing implementation successfully are new ways of looking at strategy implementation, and these are also explored. For the purposes of this study both the learning organisation and the SAP as the emerging ways of ensuring successful implementation are considered.

a) Learning organisation

According to Thomas and Brown (2011), an organisational learning mind-set is required to make organisations excel and to stimulate superior performance. In organisations where there is a commitment to establish a culture of learning such superior performance occurs and is improved by the organisation's ability to adapt to changing conditions. Steward (2001) explains that this means that the business acts as a living system. Learning is intrinsically associated with flexibility, being entrepreneurial and innovative. Together, these promote better operations and increased intellectual power in the organisation. Positioned as a place where people constantly strive to increase their capacity and outcomes, the learning organisation build on their thinking patterns and, in cases where people learn together, both individual and team learning. Consequently, organisational learning is connected to understanding how organisations learn, how learning adds to collective learning, and how that contributes to ongoing adaptation to the environment. Moreover, learning nurtures critical and creative thinking throughout the organisation. According to Skuncikiene, Balvociute and Balciunal (2009), organisational learning is seen as the ability to gain insight from experience through several actions, such as analysis, observation and experimentation, and to respond to that learning by evaluating successes and failures.

In agreement with this view, Wesner (2010) states that learning is a system of processes, actions, actors and symbols that allows the organisation to change information into knowledge that facilitates adaptive capacity. Thus, organisations must have the ability to learn quickly from their environments to compete successfully. Organisations must strive to create learning cultures and develop the workforce's competencies so that continuous learning can produce a competitive advantage (Mohanty & Kar, 2012). As a system of actions and changes, organisational learning is shown in the individual

expression of skill, attitudes and knowledge to support business goals. As identified by Lyle (2012), the organisation supports learning and development of the workforce by changing itself into one that has a learning culture. It is important to highlight that learning is an ongoing part of daily life. If learning is set as a goal in the organisation, it influences practices, perception, behaviour, values and beliefs, systems thinking, strategies and procedures (Sushil, 2007). Overall, an environment conducive to successful strategy implementation is nurtured by the learning organisation.

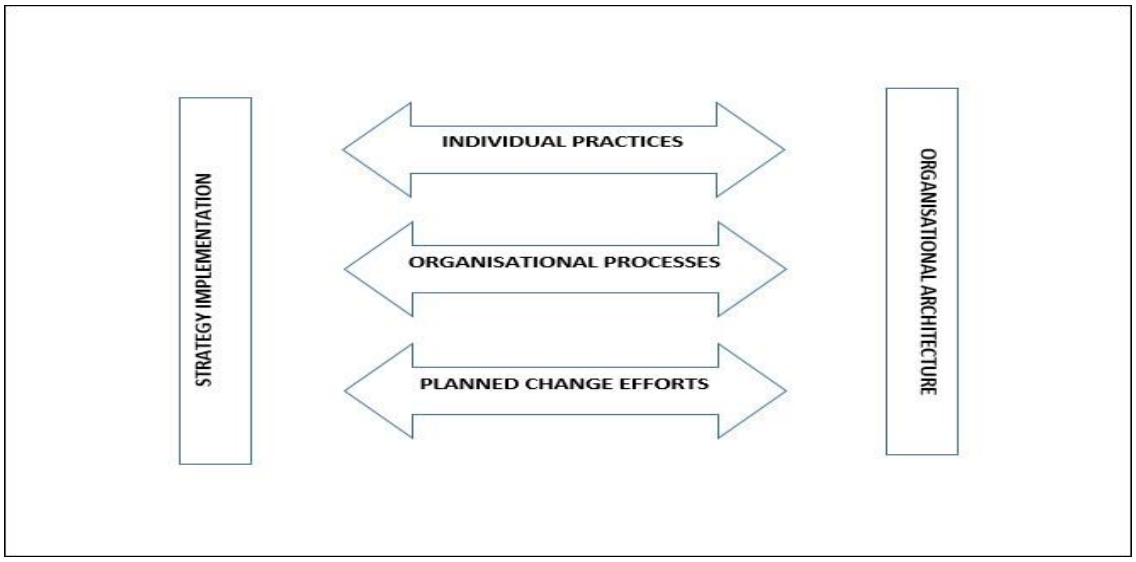
b) Emerging views

The strategy-as-practice perspective is one of the main emerging views from the strategy literature. This is about how practitioners are actually doing strategy, the processes that are involved and the practices undertaken to implement strategy. However, there are limited accounts of the practices and processes involved in this subject field, particularly in South Africa where the activities and interventions of the practitioners are not well researched. This area was identified as a lens through which the current research project explores the action of the differentiated workforce during strategy implementation. The current literature addresses areas where strategy is seen as an emergent process coming from unpredictable and changing environments that require the workforce to be agile (Grant, 2003). This research attempts to shed some light into the roles of the differentiated workforce, as critical strategic employees, and how they respond to such environments through their daily actions and behaviours in strategy making. Some theories have indicated that a learning organisation can adapt to such changes and that business is a complex adaptive system that can adapt to changing environments (Stacey, 2005; Snowden, 2008).

2.5.4.5. Summary of the theoretical mainstreams

The discussion above underlines that, from a strategy-as-practice approach, organisational architecture, planned changed efforts, organisational processes and individual practices were identified as the streams that have an impact on strategy implementation. As explained in Chapter 1, part of the overall contribution of this study is to identify the gaps and contributions of each concept. As explained previously, while these streams are integrated and complement each other, they also have an impact on implementation individually. This forms the basis from which a practice approach in this study is addressed as depicted in Figure 2.4.

Figure 2.4: The Synthesised Theoretical Framework during Strategy Implementation



Source: Adapted from Jansen Van Rensburg, (2016, p.67).

From a synthesis of the literature the basis for this theoretical approach was developed as output and it was arrived at via the gaps identified from the literature. The organisational architecture with all of its inherent components inherent is the first building block in support of the implementation effort. In order for the organisation to function optimally, the internal functions, processes and structures must be aligned. To implement business strategy, the processes, functions and structures needed and used by the differentiated workforce must be articulated. The planned change efforts as a cognitive intervention by the differentiated workforce to ensure successful implementation function in support of the architectural framework. Included in the attempt to implement strategies, formal change-management processes as well as informal and intangible interventions by the differentiated workforce are included. This is shown in a two-way relationship that has an impact on implementation as well as on organisational architecture. The integrative nature of the relationship as well as the impact an intervention may have on both implementation and organisational architecture is the reason for the two-way arrows in all three of these concepts.

The next stream of concern is implementation as process. Basically this is the process used in putting the actions into practice. A successful implementation requires all the processes to be used by the practitioners. Further, owing to the impact on the other constructs, the two-way relationship and the integrated nature of the implementation and formulation are important to note. The framework also incorporates emerging approaches on strategy implementation, by looking at practices, integration, and environmental sensing as additional constructs to be synthesised in the literature and to guide the study.

In sum, this study intends to arrive at an integrated model and should therefore include both the aforesaid approaches as well as other constructs such as barriers and enablers, and decide which are relevant to differentiated workforce practices.

2.5.5. Barriers to effective strategy implementation

An environment characterised by rapid and discontinuous change is a major challenge when implementing strategies (Ehlers & Lazenby, 2019). According to Zagota and Robinson (2002), the rapid pace of change in the current business environment poses many challenges to the successful implementation of strategy. With high levels of failure we should question the key reasons for this failure in order for organisations to implement their strategies. Carrying out specific tasks and actions as decided by management in order to make strategy work results in execution. However, because execution is reliant equally on enablers that support implementation and barriers that prevent it implementation often fails.

Research performed with 700 senior executives in 2007 revealed the following: lack of change management plan and poor organisational structure, no information sharing, unclear communication and strategy, lack of ownership of strategy, no clear policy on strategy execution, organisational structure not known, no buy-in, no incentives in support of strategies, and no funds or management support (Malek, 2008). Another study also identified obstacles found in the Norwegian ferry industry through interviews with managers and the workforce (Heide, Gronhaug & Johannessen, 2002). Several barriers were identified such as: communication, organisational structure, learning, personnel management, culture, politics and resources. Jooste and Fourie's (2009) study on the perceptions of South African business leaders focused on strategic leadership. The authors also defined barriers to, and key drivers of effective strategy implementation. According to their work, both the drivers and barriers consist of the intangible actions, or practices and processes that are undertaken during implementation by managers. Ineffective communication of the strategy, no understanding of the strategy, strategic direction by leaders, goals not fitting with the strategy, allocation of resources mis-aligned with the strategy, alignment of culture, lack of change management, strategy plans, top manager support, control, ethical principles, competence, core competencies, human capital development and social capital development were identified as barriers to strategy implementation.

Moreover, Jooste and Fourie (2009) found that structure, allocation of resources, culture, a performance management system, strategic leadership, training and development, and information systems are drivers of strategy implementation. Similarly, inability to manage change, poor strategy, no guidance on implementation, inadequate information sharing, unclear responsibilities and working

against the power structure were the obstacles identified (Hrebiniak, 2006). Pella et al., (2013) identified problems related to a corporate scorecard, including KPIs, information technology, and competence. Performance appraisal, the strategy management office and financial support were also seen as impacting on poor strategy implementation.

It is important to emphasise that in this study these concepts were incorporated in choosing the interview guide. As identified, the relationship and impact that these barriers and drivers have on the implementation of business strategy will be addressed here as this will assist in identifying the research gaps. Identifying the barriers is a means to ensure that a comprehensive study of the existing constructs is carried out as one of the objectives of the study.

In the debate on the barriers to effective implementation of strategy, Hrebiniak (2005) concludes that there are eight barriers to effective strategy implementation: developing a model to guide strategy implementation actions, understanding how formulation affects implementation of strategy, managing change effectively, including cultural change, understanding power and using it for strategy implementation success, developing organisational structures that foster information sharing, coordination, and clear accountability, developing effective controls and feedback mechanisms, knowing how to create an implementation-supportive culture and exercising implementation-biased leadership.

Along with previous studies, Kaplan and Norton's (2004) research highlights the significance of intangible assets in strategy implementation. Kaplan and Norton (2004), for example, claim that positive organisation capital is dependent on effective strategy implementation. In contrast, negative organisation capital could be a major barrier to effective implementation strategy. According to Kaplan and Norton (2004), an organisation with negative organisation capital has the following features: an organisational culture that does not support the implementation of strategy, a shortage of competent and committed leaders at all levels who should mobilise the organisation towards the implementation of the strategy, individual, team and departmental goals and objectives are not aligned to the strategy of the organisation, and a lack of teamwork and knowledge sharing needed to support implementation.

Overall, effective strategy implementation is confronted by many barriers. Further, research on strategy implementation concentrates on demonstrating what an organisation needs and what has to be done to help an organisation adapt to changing situations. More specifically, no single perspective or given guideline can counteract the deficiency experienced during implementation (Fourie, 2007). Regrettably, there is little coherence in the literature on strategy implementation. Thompson and Strickland (2003) aptly highlight this dilemma when they report that even though strategy

implementation is a key component of the strategic management process, no single framework exists for the implementation of strategy. To complicate the matter further, Noble (1999) states that, in most of the literature on strategy implementation, the nature of strategy implementation and the reasons for its success or failure are still poorly understood.

The above are some of the barriers and enablers to the successful implementation of strategy as identified in the literature as one of the objectives of the study. The implementation variables as mentioned can also be seen as enablers to implementation which are highlighted next.

2.5.6. Key drivers of strategy implementation

Conventional strategy implementation theory is centred mainly on the importance of various drivers in the form of building blocks that are needed for successful implementation of strategy. Ehlers and Lazenby (2019) argue that the major reason in this regard is to ensure a fit between these drivers and the chosen strategy in order to create an alignment between formulated strategies and those that have to be implemented.

There are structural drivers of strategy implementation and human or people drivers of strategy implementation (Skivington & Daft, 1991; Ehlers & Lazenby, 2019). Organisational structure and resource allocation are examples of structural drivers of strategy implementation. Conversely, organisational culture, leadership and reward systems on the other hand, are examples of human drivers of strategy implementation. Furthermore, organisations also utilise other instruments such as short-term objectives, functional tactics and policies to support the strategy implementation process.

2.5.6.1. Structural drivers of strategy implementation

As the external environment changes, organisations have to continuously change their strategies. Hence, with these constantly transforming strategies, it is important to ensure that the chosen organisational structure supports the strategy of the organisation. Similarly, the allocation of resources must be adjusted to align with the chosen strategy to support the new direction of the organisation to achieve both the long-term and short-term goals (Ehlers & Lazenby, 2019).

To contextualise this research, reference should be made to the theoretical assumptions that underpin this work. For example, the conventional separation of formulation and implementation which dominates much of the strategic management literature, has also been problematised. As strategy is a continuous process of self-formation and reconstruction, Knights and Mueller (2004) suggest that one way of dealing with it is to consider strategy as a perennially unfinished project. This is a dynamic view of strategy. As was mentioned earlier, structuration refers to the duality of structure and agency.

As action gives rise to structural relations so structure is intertwined with action, which in turn animates and constrains actions. This has implications for both the management and the rest of the workforce. One of the major assumptions of this study is that it is not the lone, heroic endeavours of management that determine organisational futures. The structural rules, resources and routines which they themselves shape and construct in turn constrain and/or enable leaders' actions. This is also embraced by all employees in the organisation, particularly the differentiated workforce. That is, the rise of structural relationships that subsequently enable and constrain the workforce's actions, are again shaped and constructed by the wider set of actors within social contexts. For this reason, structuration theory is aligned to this study with its focus on creating and recreating structures, making a contribution to the strategy implementation perspective. The next section highlights organisational structure and resource allocation as drivers of strategy implementation.

2.5.6.2. Organisational structure as driver of implementation

Rapid and discontinuous change, which necessitates corresponding changes in the strategies of organisations, characterises the contemporary business environment. As the existing organisational structure becomes ineffective, changes in the strategy often require changes in the way an organisation is structured (David, 2001). In a classic study of large organisations in the US, Chandler (1962, p.14), quoted by David (2001), acknowledges that: "… structure follows strategy". That is, changes in the organisational structure necessitate changes in the strategy of an organisation. Chandler (1962) also reports that as the old structure is ill-equipped to facilitate the change created by the new strategy, a change in the organisational structure occurs.

The organisation's formal reporting relationships, procedures, controls and authority, and decision-making processes are specified in the organisational structure. Organisational structure mainly specifies how and by whom these tasks must be accomplished to realise organisational goals, and declares the tasks important for the implementation of strategy. To achieve the objectives of the organisation, an organisational structure can thus be seen as the framework within which strategy implementation must take place (Hitt, Ireland & Hoskisson, 2007). To ensure an alignment between the strategy and the structure of the organisation, and to undertake the appropriate changes to either or both, if needed, is the responsibility of management. This degree of fit between the structure and the strategy influences effective strategy implementation. The ability to select an appropriate strategy that fits equally with a structure is crucial in terms of effective strategic leadership (Hitt et al., 2007).

2.5.6.3. Resource allocation as driver of strategy implementation

All organisations have four types of resources that can be used to achieve goals and to implement strategy. These are human resources, financial, physical, and technological resources, and these must be allocated in such a way to ensure that the allocation is aligned with the chosen strategy effectively. The resultant achievement of the organisations' goals lies in the real value of any resource allocation programme. According to David (2001), to support achieving new goals, a change in strategy often requires a re-allocation of resources. This view is supported by Lynch (1997).

2.5.6.4. Human drivers of strategy implementation

Over time, conventional strategy thinking on the drivers of strategy implementation has concentrated on the significance of structural drivers and tangible assets. While these are needed for operations, the intangible assets form more than 75% of the market value of an average organisation (Gratton, 2000; Kaplan & Norton, 2004). As a consequence, strategy implementation efforts should deal directly with mobilisation and alignment of these intangible assets as drivers of strategy implementation.

The following three categories of intangible assets, as identified by Kaplan and Norton (2004), are pivotal to the effective implementation of strategy:

- Human capital: value, knowledge and skills.
- Information capital: networks, systems, databases.
- Organisational capital: knowledge sharing, culture and leadership, the alignment of goals and objectives and rewards with the strategy:

According to Kaplan and Norton (2004), the following elements of organisational capital are largely regarded as the major drivers of strategy implementation – alignment of goals, and incentives, culture and knowledge sharing. One of the best predictors of successful strategy implementation is the ability to create positive organisational capital (Kaplan & Norton, 2004). To be competitive in the current business environment that is subject to constant change, several trends emerge. In many knowledge organisations attention shifts to the workforce for competitive advantage. Further, organisations have to embrace continuous change. Adaptive organisational cultures, strong leadership and competent workforce are needed to form the cornerstone of strategy implementation (Ehlers & Lazenby, 2019).

2.5.6.5. Organisational culture as driver of strategy implementation

Members of an organisation share beliefs, values, behavioural norms and shared assumptions. This bond forms what Pearce and Robinson (2005) call organisational culture. Handy (1993) supports this view whereas Thompson and Strickland (2003, p.422) refer to culture as "the way we do things around here". Every organisation has its own unique culture or personality. Culture can be a source of competitive advantage because it is rare and not easily imitated (Hitt et al., 2007). Kaplan and Norton (2004) corroborate this interpretation. When the vision, mission and core values required to effectively implement the strategy are internalised and lived, then people understand culture. Dramatic changes in the existing organisational culture are required for most new strategies.

Strategy implementation can be hindered or enabled by organisational culture. As a barrier for instance, the high failure rate of mergers and acquisitions is owing to high cultural incompatibility (Kaplan & Norton, 2004). However, for an organisation pursuing growth strategy, the ability to incorporate new organisations into the existing organisational culture can also serve as a competitive advantage. Thompson and Strickland (2003) concur with the idea that an organisation's culture can either be an important contributor or a barrier to the successful implementation of strategy. When the vision, mission, strategy and objectives are aligned with the culture, a strong culture promotes effective implementation of strategy. Many researchers [such as Thompson and Strickland (2003) Freedman and Tregoe (2003)] show that an aligned and well-matched strong culture has a positive impact on strategy implementation, and that a strong culture well matched to the strategy is a powerful lever to implementation. Taking this view further, Freedman and Tregoe (2003), argue that culture is a positive force when it is aligned with strategy and an organisation's people management ethos. In fact, because culture is closely related to leadership, it is a major task of top management to shape corporate culture (Ehlers & Lazenby, 2019; Hitt et al, 2007; Pearce & Robinson, 2005; Bossidy & Charan, 2002; Raps, 2004; Thompson & Strickland, 2003). In support of this view, Fourie (2007) maintains that management is responsible for creating, nurturing, and even changing the culture of the organisation. According to Jack Welch (2001), former CEO of GE, top management must create new values and behaviours for the organisation in order for a new strategy to be effectively implemented. As aptly put by Kaplan and Norton (2004), the attitudes, values and behaviours of the workforce are an important realisation of the organisational culture. According to Hitt et al. (2007), cultural change for example, can only succeed if it is has top management support. On the basis of this perspective, Fourie (2007) emphasises that organisational culture affects the commitment to the success of strategy implementation as well as the degree of the ownership of the strategy implementation efforts that the workforce at all levels of the organisation take. In conclusion,

Hrebiniak (2005) suggests that inappropriate cultures that do not support strategy implementation drive must be changed.

2.5.6.6. Reward systems as a driver of strategy implementation

Effective implementation of organisational strategy, as identified by Lynch (1997), involves a competent and motivated workforce. Simply put, both managers and the workforce must be committed and motivated to the implementation of organisational strategies. As the discussion up to now suggests, part of what is needed is establishing the organisation's reward system that involves tools that an organisation can use to improve and motivation commitment (Thompson & Strickland, 2003).

According to Ehlers and Lazenby (2019), the allocation of monetary and non-monetary awards to these factors, and for the many different factors considered in performance evaluation, is referenced by the umbrella term, reward systems. In this regard, both the reward for performance and the concomitant performance evaluations can be seen as powerful tools used to effectively implement strategy. Reward systems should be developed in a way that aligns them to strategy implementation, as well as trying to influence workforce behaviours to support the implementation of strategy.
Hrebianiak (2005) highlights that reward should be connected to the specific outcomes that are key to strategy implementation, so taking actions and attaining desired outcomes should be the focus of reward, thus ensuring that the workforce on all levels of the organisation is rewarded accordingly.

Reward systems reflect the attitude of top management to performance particularly in the way that they compensate for action and results (Pearce & Robinson, 2005). In order to be effective as a driver of strategy implementation, reward systems should focus on the whole organisation (Thompson and Strickland, 2003).

2.5.6.7. Challenges to strategy implementation

The role of the differentiated workforce as a component of drivers of strategy implementation will be discussed in Chapter 4. The conclusion that is drawn from the strategy implementation literature is that the current work on strategy implementation is fragmented (Hambrick, 2004; Volberda, 2004). Some scholars suggest that the traditional understanding of the concept of strategy no longer operates (Farjoun, 2007). Bodhanya (2009) points out that as a vast field of knowledge, strategy draws from diverse disciplines in the social sciences including economics, psychology, sociology, marketing and organisational behaviour. Given these disparate research agendas and the perceived fragmentation, there has been a call for more integration and consolidation. This study is a response to that call for

renewed interest and better integration between strategy content, strategy process and strategy implementation. Those studies that focus on strategy content tend to ignore the implications for strategy implementation and the constraints that are faced in real organisations resulting in over-simplified, far-fetched and implausible strategies. This study assumes that strategic processes are complex in nature.

Similarly, this work focuses on the workforce that is engaged in organisational work and aims to challenge the general tendency to assign anthropomorphic qualities to organisations that that ultimately negate the human element in conventional strategy research. The separation of formulation from implementation domination of research has been seen as problematic. According to Knights and Mueller (2004), strategy can be seen as an infinite perpetual project. Simply put, it means that strategic process is an ongoing process of self-recreation. Furthermore, Bodhanya (2009) says that projects are made up of many stakeholders who have different levels of power and different demands. As the organisations attempts to placate the many sets of stakeholders and meet their demands, strategy therefore, appears as varied and different configurations.

2.5.7. Materiality and tools used in implementation

A brief reference is made at this point to the tools managers and practitioners use to implement strategy. More specifically, there are certain physical, social and material tools within the SAP perspective that are in use during the process of doing strategy. Many SAP scholars confirm that strategising is accomplished though material aspects such as documents, buildings, devices, telephones, emails, meetings, workshops, informal communication, etc. (Jarzabkowski & Whittington, 2008a) and strategising depends to a large extent on how these material aspects of strategy are organised if they are to impact on strategising. For the purpose of this study, text, talk and tools form the basis of materiality. In order to add to existing literature on the use of these tools by practitioners, the gaps that exist in this construct will be identified.

According to Kaplan and Norton (2007), one of the most popular tools in use in strategy performance management is the balanced scorecard. To measure performance and achieve objectives it uses the financial, customer, internal process, learning and growth perspectives in an organisation, and its focus is to monitor strategy, evaluate progress and manage the process of strategy implementation. In their study, Kaplan and Norton (2005) show that up to 95% of employees are not aware of or do not understand their organisation’s strategy and found that the gap lies between formulation and implementation.

Project management is another tool to ensure that the chosen strategies are implemented. According to Longman and Mullins (2004), project management is an important tool to use in strategy implementation and is driven by specific deliverables and back-up plans. These authors suggest that project management is more effective when combined with other constructs of implementation frameworks such as strategy, goals, leadership, processes, human capabilities, culture and performance systems.

For the purposes of this study, material aspects will be analysed as intertwined with social elements in practice (Olikowski & Scott, 2008), thus the discussion of the materiality of strategy work within the insurance industry also invokes the social aspects of materiality. The material side of strategy work generates outcomes of success or failure, benefit or cost and conditions that either enable or hinder strategy work.

According to Le and Spee (2015), the focus placed on strategy as the work that people do reveals the importance of materials in strategy work. A materiality lens urges us to pay attention to the material aspects of strategy work by indicating how communication and tools features can enable and constrain strategizing activity (Dameron et al., 2015). According to Le and Jarzabkowski (2014), in moulding the cognitive and behavioural 'human dynamics' that underpin strategy work, the materiality of objects hinders and enables different actions, and allows actors to engage in strategy making (Jarzabkowski & Kaplan, 2015; Paroutis et al., 2015). Werle and Seidl (2015) suggest that it is the constellation of material artefacts, in particular the interplay between different types of material artifacts that impacts strategizing. Overall, SAP scholars (such as Balogun er al., 2014; Dameron et al., 2015; Streeck et al., 2011) argue that strategy work is embedded on materiality.

Despite acknowledging the importance of materiality, few strategy researchers have brought such a view to bear in strategy implementation by investigating how materiality is connected to achieving business strategy. Material objects may include services and products that comprises the organisation's core purpose and strategy, thus lying at the heart of what the organisation does. Rouleau (2005) shows how, in her study of a fashion house, a line of designer clothing was used to facilitate customer connection with the production function, as clothes were key in delivering the design philosophy of the firm and achieving its business objectives when people bought clothes. Thus the fashion house used its clothing range to link people with the brand. This is not unique to the fashion industry and extends to other product-based industries as well.

2.6. CHAPTER SUMMARY

This chapter has provided an overview of the insurance industry globally, but with a particular emphasis on South Africa, as per the current research. The focus of this study is to identify the challenges within the industry, and hence, in line with SAP research, this chapter begins with a context-specific focus to better understand the practices and processes of strategy implementation work by practitioners. The chapter explores the concept and importance of strategic management through a critical evaluation of the literature. The study views strategic management as a continuous process in which formulation and implementation are integrated. However, strategy implementation remains a huge challenge in many organisations. The framework around strategy making and implementation within the dominant strategic paradigm is the foundation of this work.

To remain competitive in business, strategy formulation and implementation are essential but also, and according to Van Zyl (2004), proper implementation of strategy is important. The need to reformulate strategy also becomes more pressing as the business environment becomes more complex and ever-changing. Frequently, considerable time is spent by management teams on formulating excellent strategy which is not well executed. Employees at three out of five companies studied in a survey conducted by Neilson et al., (2008) rated their organisation as being weak in strategy implementation.

As was mentioned before, to achieve superior business performance research it has been shown that strategy implementation is more important than strategy formulation (Holman, 1999). Again, a number of experts (Kaplan & Norton, 2004b; Hrebiniak, 2005) conclude that many business initiatives fail not because of strategy formulation but rather on account of poor strategy implementation. There are fewer strategy implementation frameworks than there are strategic analysis and strategy development frameworks (Minarro-Viseras, 2005; Okumus, 2003). To improve strategy implementation, more research is needed on the strategy implementation perspective. The 5Ps Model is one such strategy implementation tool that is vital to enable strategy implementation, and has been explained in section 2.5.4.1.

In sum, in order to ensure successful strategy implementation there is a need to ensure that the intangible, extraordinary social interventions and processes become part of the whole process. Early research focused on how to conceptualise strategy implementation plans. The pioneering structural control view represents a top-down approach on strategy implementation (Hitt et al., 2017). To achieve the plans, systems, incentives, structures and controls were established for implemention. This perspective presented a theoretical foundation for early research on how to conceptualise strategy implementation. The adaptive turn has shifted the focus of strategy implementation. A

detailed discussion of this practice approach and new concept in the strategic management field, strategy-as-practice, is discussed next.

3. THE STRATEGY-AS-PRACTICE APPROACH

3.1. INTRODUCTION

The purpose of this chapter is to explore and to present an in-depth account of the SAP approach, to investigate the three elements of SAP found in the literature and to explain the theoretical base of the study. SAP research agenda is discussed, and the critique of the SAP view is presented. This chapter is embedded in the view that strategy is based on the activities of organisational members, that is, something that the organisational members do (Jarzabkowski et al., 2007).

As explained by Vaara and Whittington (2012), strategy making is an umbrella concept that describes the many activities that result in the creation of the organisational strategies. Importantly, these activities comprise strategy making in the sense of the formulated strategies, the organising work involved in the implementation of strategies, and all the other activities that lead to the emergence of organisational strategies. Even though SAP conceptualises both formulation and implementation as intertwined, in this study, the focus will be on strategy implementation.

3.2. DEVELOPMENT OF STRATEGY AS PRACTICE

As already emphasised in this literature review, the strategy-as-practice (SAP) field has emerged and developed as an alternative and suitable theoretical perspective from which to conduct strategy research. Yet, our understanding of the implementation of strategies in today's turbulent and fast-changing world remains limited. The theoretical lens used for this study is centred on the SAP field as described in Chapter 1, and, as indicated, within this perspective formulation and implementation are seen as intertwined, not separate entities.

3.2.1. SAP, processual research, and the resource-based view

As previously noted, a processual research perspective is the precursor of a practice-based research agenda. Pioneered by Bower, Mintzberg and Pettigrew, among others, in the 1970s and 1980s, process research has a longstanding tradition in the field of strategy. To what extent is the strategy-as-practice research agenda distinct from traditional strategy process research? Leading SAP scholars such as Jarzabkowski and Spee (2009) argue that this debate is unwarranted. For instance, some researchers suggest that the practice-based approach is just a sub-category of process research, while others claim that the terms "practice" and "process: are in fact used interchangeably. According to Jarzabkowski and Spee (2009), based on the extant literature, there are major differences. Firstly,

rather than seeking to explain strategic change and corporate performance, the practice-based approach differs from traditional process research in its focus on how strategy action is produced and reproduced. Secondly, while the process focus occurs at the macro-level of organisations and markets the practice-based approach addresses multi-levels of action and interaction within the organisation. A further distinction is that in a practice-based approach strategising activities are rooted in the wider practices of society and provides insights beyond organisational processes.

Although indirectly related, RBV is another traditional perspective within strategy research that is worth highlighting and that is related to the discussion of process research. As pointed out by Mahoney and Pandian (1992), organisations can be conceptualised as bundles of resources that are heterogeneously distributed across organisations, and over time these resource differences persist. Hence, according to the RBV, transforming them into organisation-specific, valuable and unique resource bases and comprehending how various firms attract, allocate, develop and bundle available resources, creates competitive advantage (Wernerfelt, 1984). Research has identified a series of qualities that characterise a resource base using fundamental assumptions that create the potential for a firm to achieve sustainable competitive advantage (Wernerfelt, 1984). In this perspective, the resulting strategy and performance will be impacted by the actual strategising practice of attracting, allocating and developing resources thus will substantially shape strategy (Mahoney & Pandian, 1992). It is thus evident that various key elements of the resource-based view are incorporated in the SAP agenda, although the scope is much wider.

Finally, as already emphasised, advances in social theory, as represented by Weick (1979), have also influenced the practice-based perspective research agenda. Social theory is significant in placing organisational actors and actions at the centre of attention in organisational life. The seminal arguments by Bourdieu (1977) and Giddens (1984), for instance, assert that social theory of practice approaches phenomena not as properties of particular groups, organisations or societies, but fundamentally as things that people do (cited in Whittington, Molloy, Mayer, & Smith, 2006, p.617).

3.2.2. SAP defined

Strategising means "the continuous formation and transformation of strategic and organisational patterns of activities" (Melin, Ericson, & Mullern, 1999, p.5). The "activity-based view", which was originally used by Johnson et al. (2003) is an alternative term to strategising and has since been lost within the broader "strategy-as-practice" research agenda (Jarzabkowski et al., 2007). The term strategising tends to be linked with another alternative widely-used concept within the existing academic literature, namely "strategy-as-practice" (Whittington, 2002; Jarzabkowski, 2003;

Whittington et al., 2004). Jarzabkowski et al. (2007, p. 7) state that "from a strategy-as- practice perspective, strategy is conceptualised as a situated, socially accomplished activity, while strategising comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity".

From the continuous flow of practices, processes and interactions in any given organisation, daily life emerges and evolves from the strategy formation. Rooted within the ongoing organisational process, these practices and interactions are unique to each organisation (Whittington, 1999; Nygaard & Bengtsson, 2002; Johnson & Scholes, 2002; Johnson et al., 2003). Furthermore, the strategising concept also entails that strategy formation can be formed through both formal and informal means and can either be deliberate or emergent (Eden & Ackermann, 1998; Maitlis & Lawrence, 2003). Eden and Ackermann (1998) assert that informal or emergent strategising is not random.

The strategising perspective shifts the focus towards organisational processes, practices and inter-individual interactions that occur at different levels in different organisational contexts, and in related strategic outcomes (Johnson et al., 2003). It follows that the strategising perspective is not only concerned with organisations at the macro level but is instead a multi-level approach with significant emphasis also placed on the micro levels of the organisation thereby addressing issues and activities not always taken into account by the macro-perspectives of strategy formation. The 'practice' part in strategising "refers both to the situated doings of the individual human beings (micro) and to the different socially defined practices (macro) that the individuals are drawing upon in these doings" (Jarzabkowski et al., 2007, p. 6-7). Therefore, strategising, as a research agenda, focuses on the activities of individuals, groups, and networks of people upon which these key processes and practices depend (Johnson et al., 2003). The strategising perspective necessitates that a micro focus is essential for understanding the social, interactive, social-cultural and socio-psychological aspects of strategy formulation and the role of organisational agents. Consequently, as identified by Jarzabkowski and Spee (2009), this approach places significant importance on developing stronger, practice-based links between micro- and macro-phenomena. Furthermore, on the basis of their findings, Balogun et al. (2003) conclude that a substantial part of the strategising agenda is about understanding tacit, deeply embedded, and therefore hard to get at phenomena such as norms and values.

The centrality of human action and interaction within this definition requires us to make an overarching observation about our ontological position in relation to mainstream work in strategy. Human action comes to be something that is deduced or assumed from findings or insights drawn from macro levels of economic or sociological inquiry and is theorised as somehow disembodied. Because a practice-based view calls us to see strategies and strategising as human action, as doing,

and because it places human interaction at the centre, it takes a different ontological position from mainstream strategy research. Indeed, the placing of practice at the centre needs a fundamentally different view of what strategy is all about (Johnson et al., 2007).

3.2.3. Features of the SAP school of thought

As a school of thought, SAP departs from traditional ways of thinking and doing research associated with strategy (the dominant strategic management paradigm, as illustrated earlier). In the following two sub-sections the main features as well as the potential benefits and contribution of this research agenda are briefly summarised.

The first key feature worth distinguishing is that the proponents adopt a practice-based view whereby concepts and terms such as 'strategy' and 'organisation' are replaced by more dynamic process ones such as 'strategising' and 'organising'. For instance, the way an organisation is organised affects its ability to strategise; and the concept of organising goes beyond organisational structure (Whittington et al., 2006). Hence, the distinct stress on doing strategy and on a practice-based approach. Also the importance of practical activities in strategy formulation and analysis is emphasised. Key questions that SAP attempts to answer on strategy are who does it, what do they do, how do they do it, what they use, and what implications this has for shaping strategy. In this way, SAP as a research topic is concerned with the doing of strategy (Jarzabkowski & Spee, 2009; Hambrick, 2004; Jarzabkowski, 2004) which is consistent with the idea that strategy is the tool organisations use to achieve their goals (Andrews, 1971; Ansoff, 1965; Tassiopoulas, De Coning & Smit, 2016). As people in all hierarchical levels participate in varying degrees in planning, implementing and controlling it stands to reason that strategy does not happen by itself. A concern about what strategic actors do and the kinds of activities they perform when they strategise is at the core of this approach. To reiterate, the purpose of this study is to explore the strategy implementation practices of the differentiated workforce, and this underscores the activity implied by the word strategising as 'doing' strategy, and its concomitant shift of focus towards human activity. Two fundamental components in the strategising framework are therefore strategising practices/ activities, on the one hand, and organisational practitioners/ actors on the other. This approach exhibits a significant departure from traditional formal strategy making and analysis.

The second feature of strategising is that it shows some clear and important differences from the traditional view of strategy as strict and orderly sequences between the analytical formulations of strategy along various stages until its smooth implementation. Instead, as organisations are constantly evolving and changing activity, strategising requires the continuous adjustment of organisational

strategies. To achieve this, mastery of the skills and tools of organising and reorganising is required (Whittington et al., 2006), which then becomes as important as organisational design and formal strategy formulation. If one considers the nature of modern organisations and the wider business environment, then the concept and practice of strategising becomes not only evident but also a necessary response tool. The latter is crucially characterised by a notable acceleration of change processes and competitive environments that are features of modern organisations. These characteristics are, as we have seen by the widespread globalisation phenomenon, further amplified by these trends particularly over the last two decades (Nadler & Nadler, 1998; Wilson, 1992). Whittington et al. (2006) argue that an organisation that is attentive to the hands-on skills of practical activity promotes a practice perspective on strategy.

To shed further light on the more subtle differences between strategising and the traditional view of strategy, Whittington et al., (2006) adopt the middle view that whilst formal strategy analysis is still relevant to the organisation, it is nevertheless required to be continuously renewed through a greater appreciation of the everyday practical, non-analytical skills required to carry it out. This view is not as extreme as that of Mintzberg's classical "crafting" metaphor in which formal strategy analysis is seen as no more than a distraction. In his stance, Mintzberg uses the famous analogy of a strategist being compared to a potter. He therefore considers strategy as being "crafted" through emergent processes as opposed to deliberate strategy formation. Whittington et al., (2006) extend and support the idea that organisational agents and managers are seen as 'craftspeople', adopting a hands-on approach and thus shaping strategic goals and directions in an almost intuitive fashion. Various authors make use of Mintzberg's "crafting" metaphor in order to emphasise the importance of practical tools whereby the "potter's wheel" in Mintzberg's metaphor is simply replaced by mundane practical tools within modern organisations such as flip-charts, mobile phones, computers, PowerPoints and so on. Furthermore, this crafting metaphor is then applied to formal strategy making, which is, paradoxically, the very notion that Mintzberg's theory attempts to critique (Mintzberg, 1987; Weick, 1987; Heracleous & Jacobs, 2008).

Additional features of the SAP view are further discussed by Whittington et al. (2006). The authors reveal that the strategising agenda and perspective entail three major shifts in focus. Firstly, the shift from states to activities whereby organisational strategy is seen as a continuous set of strategising and organising activities performed strenuously and sometimes artfully by organisational agents including but not restricted to those at the management level. The second major shift is the move from the analytical to the practical, whereby routine activities become the focal point of strategy making not just the traditional analytical sequence from strategy formulation to implementation. Strategising is intensely practical, and "detached [formal] analysis" (Whittington et al., 2006) takes on a lesser

importance owing to the intensity of rapid change. The authors clarify this observation further when they mention that to strategise or to organise both require a command of interpersonal skills, communications technologies, software modelling and scheduling devices that are easily taken for granted. The third and final important shift is the shift from "dualism to duality" whereby strategising and organising "become very similar or even common", often running together as simultaneous activities in an organisational environment shaped by interdependencies not separation, complexity rather than superficial simplification, and the untidy reality of organisations rather than simple analytical clarity (Whittington et al., 2006, p. 618).

One remaining issue that is worth highlighting is the role and importance of context in the SAP agenda. As Hall (2003) asserts, strategising entails sensitivity to context. Despite the fact that prior research in the strategy and management fields paid significant attention to contextual issues such as cognition, power, learning, culture, and politics as important features of strategy (Hall, 2003), the strategising approach puts even more emphasis on the importance of contextualisation. Strategising requires that micro phenomena are to be understood in their wider social, political, and economic contexts in which strategic action has occurred; actors are not acting in isolation but are drawing upon the regular, socially defined modes of acting that arise from the plural social institutions to which they belong (Jarzabkowski et al., 2007). They further argue that much of the social infrastructure, such as tools, technologies and discourses, through which micro-actions are constructed, has macro, institutionalised properties that enable its transmission within and between contexts.

3.2.4. Development and contribution of the SAP research agenda

According to Jarzabkowski et al. (2007), SAP as a new field of research has grown rapidly and there exist a number of reasons behind the rise of this approach to conducting strategy research:

- Firstly, since the pioneering work of a number of strategy scholars such as Porter (2008), Hamel (2000) and Eisenhardt and Sull (2001) strategy research has mostly focused on and been largely based on a micro-economics research tradition. A prime drawback of this research tradition is the marginalisation of the human being in an organisational context. Related to this is the resulting over-focus on the macro level of firms and markets, thus reducing strategy analysis and formulation to a few casually related variables in which human action is scarcely taken into account (Jarzabkowski et al., 2007).

- Secondly, the field of strategy research has seen an increasing dissatisfaction with conventional strategy research (see, for instance, Jarzabkowski et al., 2007; Jarzabkowski & Spee, 2009). Hence, SAP offers renewed avenues for research in the field.
- Thirdly, a major concern about conventional strategy research is that strategy theorising and formulation are mostly based on macro-level variables such as industry-level effects, economic considerations and firm performance. This particular focus of conventional strategy research on economic foundations has, according to Johnson et al. (2003), led to a major limitation in that there is too little or not enough attention paid to micro-level events and the internal dynamics of the firm. Additionally and more importantly, one can quite clearly notice the apparent absence and marginalisation of the role of human agents, their actions as well as their interactions within the firm (Jarzabkowski et al., 2007; Jarzabkowski & Spee, 2009). SAP may thus be seen as part of a broader concern to humanise management and organisation research (Jarzabkowski et al., 2007; Weick, 1979; Pettigrew, Thomas, & Whittington, 2002). The SAP research agenda is therefore primarily concerned with living beings whose emotions, motivations and actions shape strategy (Jarzabkowski & Spee, 2009). In addition to what has already been discussed, the strategising research agenda has numerous potential benefits and contributions. Firstly, the strategising approach can contribute towards a better understanding of how daily behaviour in organisations creates strategic choices and consequences. This becomes particularly important when realising that strategic advantage is most often found in embedded, idiosyncratic routines (Barney, 1995; Ambrosini & Bowman, 2001). Furthermore, by explicitly factoring the relationships between strategies and everyday actions in the study of strategising, this approach will allow for a better understanding of the social dynamics involved in strategy making and formulation (Wernerfelt, 1984).

Secondly, by bridging the gap between the strategy actors, activities and strategy target achievement, strategising research entails a practical evaluation. In particular, it serves as a bridge between duality within organisational life such as strategic thinking and acting, and strategy formulation and implementation. “Practical-evaluative agency is thus a way that managers bridge the gap between strategic thinking and acting and strategy formulation and implementation in practice” (Jarzabkowski, 2005, p. 32).

Thirdly, another clear contribution of the SAP approach is that it can identify the concrete skills and practices that managers actually use, as they are adapted to the needs of particular contexts in being sensitive to the practicalities involved in strategising and organising (Whittington et al., 2006). According to Jarzabkowski and Spee, (2009), the strategising research agenda has thus been proposed

as a means of furthering the study of social complexity and casual ambiguity in the resource-based view. Also it helps in explaining the practice that constitutes strategy process as it unpacks the dynamism in dynamic capabilities theory.

The importance of a focus on the processes and practices constituting the everyday activities of organisational life and relating to strategic outcomes is the central feature underlying this perspective. Furthermore, by finally linking the outcomes of diverse strategising activities, events and behaviours within the organisation to more macro organisational, institutional and even broader social contexts and outcomes, this approach illustrates the linkage through to strategic outcomes as an important component of the scholarship. The emerging approach, advocates claim, combines macro consequences of those micro activities and inner-organisational processes of organisational strategy making. This means the main research interest is where and how the work of strategising and organising is actually done, who does this strategising and organising work, what are the skills required for this work and how are they acquired (Whittington, 2002). It must be understood that SAP is a systematic critique of orthodox, hegemonic, and mainly North American strategy research and that SAP is couched in European characters (Carter et al., 2008).

3.2.5. The 3Ps of SAP

A practice view on strategy should give attention to how strategic actors draw on institutionalised organisation-wide strategic practices such as tools, routines or discourses at supra-organisational levels, in creative and unique ways in their strategy praxis such as specific activities like talk, meetings, retreats, conversations, interaction, behaviours (Whittington, 2006). The interaction of these three concepts produce strategising. In addition to the three factors, Whittington (2008) mentions the fourth theme that is connected to strategising, the profession of strategy as an institution within organisational science.

3.2.5.1. Praxis

According to Reckwitz (2002, p.249), praxis "…represents merely an emphatic term to describe the whole of human action, in contrast to 'theory' and mere thinking". As identified by Whittington (2006), praxis involve that which practitioners actually do, in other words, all the many actions included in the deliberate strategy formulation and implementation. To this end, strategy praxis can be seen as "intra-organisational work work required for making strategy and getting it executed" (Whittington, 2006, p.619). Jarzabkowski and Spee (2009) agree. The authors describe praxis as "the stream of activity in which strategy is accomplished over time" (p.73). Praxis is constituted of all the stakeholders in an organisation and those socially, politically, and economically embedded

institutions within which individuals act and to which they contribute (Jarzabkowski et al., 2007). These activities include formal and informal ones, routine and the non-routine, core activities and peripheral ones form organisational praxis. For example, attendance of a strategy workshop, use of a balance scorecard or a PowerPoint presentation are formal activities. Conversely, informal activities like talks in the cafeteria or individual behaviour in a decision-making situation are more important for SAP research activities because, by definition, their focus is on the real work of strategising.

The flow of activities in which strategy is made is praxis. Praxis could include the following activities: meeting, talking, calculating, form filling, and presenting, of which strategy is constituted (Jarzabkowski & Whittington, 2008). Daily actions that occur in the organisation are linked to strategising. SAP recognises the importance of the relationship between those activities and the context (social, institutional or organisational) in which the activity happens. Also SAP recognises the importance of the relationship between those activities (Johnson et al., 2007). Various organisational or governmental rules and guidelines that influence the way in which a strategic direction of an organisation is explained, which person takes part in the strategy formulation process and which resources are available for the individuals involved would provide the context factors. According to Rasche (2008), praxis as individual action is distinguished from social practice by SAP proponents when they postulate that unlike social practices that pertain in a stream of activity, strategy praxis describes the whole of human action with regard to strategy.

3.2.5.2. Practices

Sociologists like Elster, for example, argue that the elementary unit of social life is the individual human action. Practices refer to a social construct that has emerged over time, which sustains, reflects and recreates knowledge, norms and values from a sociological view. Therefore, by defining and institutionalising what is acceptable within a society and what is not according to these insights, practices reduce complexity, and thus order the social world (Geiger, 2009). Notwithstanding that researchers use a broad definition of the term to signify the multiple aspects of practices, the concept of practices is not consistently used by SAP experts. For example, Reckwits (2002) sees practices as routinised types of behaviour that are made of many components. These elements are interconnected, like forms of bodily activities, things and their use, forms of mental activities, a background knowledge in the form of understanding, states of emotion, motivational knowledge and know how. In contrast to ostensive routines that are stored in the collective memory of the organisation and applied in various episodes of praxis by practitioners, in the SAP approach practice can be seen as performative routines. Therefore practices are situated in the collective brain of the organisation and consequently in the macro level of strategising, and not in the individual's action and mind.

Practices are located at multiple levels. SAP defines them mainly as organisational-specific embodied cultures that shape local modes of strategising in routines and in operating procedures. Importantly, the social environment of the specific organisation also influences strategy practices. For instance, norms of appropriate strategic scale, scope or structure that are diffuse across nations could include social practice at a higher level social practices (Whittington, 2006). In conclusion, within SAP it is suggested that practices are related to supra-individual structures. These would include shared routines, social and cultural norms and ways of thinking. In fact, practices reflect organisational cultures.

3.2.5.3. Practitioners

According to Whittington (1996), how the actors of strategy act and interact is the focus of the SAP approach. Researching the individual action approach is similar to the marketing concept of "unique selling proposition". Rather than focusing on strategy as the property of organisations, SAP is concerned with strategy in organisations and typically on the interaction of people (Johnson et al., 2007). SAP scholars are more concerned with the outcome of those individual actions on an organisational macro level, although SAP traditional approaches recognise the importance of individual actions. Researching the individuals who carry out the practices distinguishes SAP scholarship from traditional approaches that focus on the practice itself. Feldmann (2000, p. 274) puts it eloquently: "When we do not separate the people who are doing the routines from the routine, we can see routines as a richer phenomenon." The author suggests that the people who perform the routines think, feel and care. Their reactions are contained and situated in personal, institutional and organisational contexts. Palmer and O'Kane (2007) echo these sentiments when they agree that SAP puts greater emphasis on how corporate managers do strategy, that is, strategic thinking, the spotting of opportunities and the grasping of situations. In sum, this approach is embedded in the practitioner.

Therefore, doers of strategy work are practitioners who include not only top management but managers at all levels, indeed the entire workforce of the organisation plus external actors such as consulting organisations that develop new ideas and practices, market analysts and government regulators. When practitioners strategise, Jazabkowski and Whittington (2008) reveal, they use social, symbolic and material tools that support their activities. The authors also focus on the outcome of individual actions, with the performance of practitioners in terms of their local effectiveness, and also with the performance of the organisation as a whole. Practitioners are required to utilise resources such as strategic tools skilfully in order to be effective. This skilful adaptation results in the creation of routinised behaviour and in social practices provided that the routinised behaviour is stored in the

collective memory of the organisation. To this end, if a strategist carries out practices, she or he adopts organisational practices that were used in the past and evaluated by other practitioners in a positive way. In a case of a strategist learning a practice for example, that person learns to comport themselves and move in a particular way (Rasche & Chia, 2009). The combination of the practical and procedural activity, especially the ability to choose the appropriate move at the ideal time is the main issue of the reflexivity of a strategist. Practitioners have the possibility to change their behaviour intentionally and to reflect their individuality as actors who demonstrate ingenuity in their practice. Actors are therefore, involved in a specific situation of praxis and interpret ion and apply practices in a context specific manner.

Importantly and of significance to the current study especially at a practical level is asking who these practitioners are. Strategy practitioners are not only confined to senior executives at the macro level like TMT and board members, for whom strategy is the core of their work (Whittington, 2006). In addition to TMT, the strategy literature also stresses the main role of other practitioners in doing strategy. These include middle managers, external consultants and consulting firms. According to SAP scholars (such as Whittington, 2006, Balogun and Johnson, 2004), there is evidence that with middle managers as practitioners, this group finds it difficult to be completely involved in strategy work. According to Maitlis and Lawrence (2003), this may not be surprising because effective participation in strategy work at senior management levels cannot be assumed to occur. Therefore, the focus in the present study of the differentiated workforce as strategy practitioners in non-managerial positions is theoretically justified and called for. The appropriate practitioners in this research include key professionals within the insurance business in South Africa. The full description and role of each of these practitioners are fully discussed in subsequent chapters.

In sum, the review of the SAP theory and extant literature signifies the role of practitioners within the three dimensional SAP theoretical framework (Whittington, 2006). Strategy practitioners are pivotal in depicting the main associations between organisational practices on one hand and organisational praxis on the other. More specifically “practitioners are crucial mediators between practices and praxis” (Whittington, 2006, p.626).

3.2.5.4. Profession

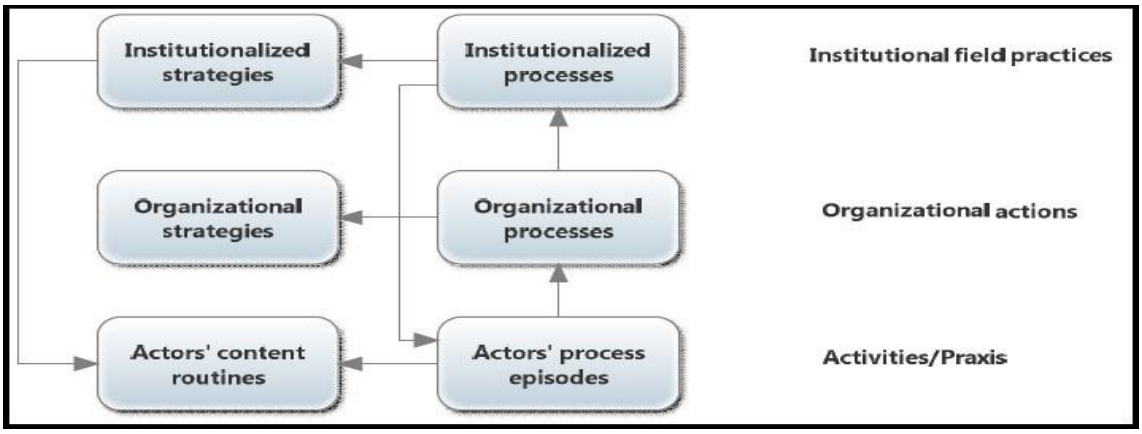
As already indicated, Whittington (2007) added the fourth p into SAP. He concludes that professionalisation of strategy results from the interaction between practitioners as general classes. He confirms the importance of strategy in a professional environment and in a specialised institutional field in which both the strategy researcher and the teachers do their work. He compares a collective identity and a set of connections that goes beyond particular organisations of strategy research with

professions like law or medicine and identifies a group of strategy researchers. In this institutional field the involved actors are therefore multiple. Whittington (2007) names legal firms, consulting firms, business schools, business media, academic journals, professional societies, enterprises and managers that deal with strategic matters as examples in this group.

3.2.6. SAP concepts

From the literature, it is clear that the doing of strategy is developed and achieved through a set of social processes. For the purposes of this study the context and level in which this research is to be examined is the model defined by Johnson et al., (2004). In line with the research question, it is not the intention of this study to deal with strategy process and content at the organisational level, but rather at the level where strategy actually occurs. As indicated in Figure 3.1, there are three levels of strategy (Johnson et al., 2004). First is the supra-organisational level at which the processes and organisational culture are internalised by certain institutional practices shaped by industry, national and professional bodies. At the second level, the organisational level, a more prescriptive approach is followed. The micro level, where process and content are being defined by the people who actually do strategy forms the third level (Johnson et al., 2004). To reiterate, this is where the focus of this research falls.

Figure 3.1: The Three Levels of Strategy



Source: Johnson, Melin & Whittington2004

3.2.7. SAP processes and practices

Strategy practices and processes are the areas to be explored at the micro level. The process question here is: How the practitioners use their common-sense and experience to produce desired outcome during strategy implementation? Professional knowledge of strategy tools together with their social

skills yield the needed results. Practice involves, on the other hand, the organisation's dynamic capabilities used to produce the required results. According to Valmra et al., (2006), through actions such as decision-making, strategic alliances and product or service development are actions that could produce this. As described in the SAP theory, it can also be seen as being in addition to the practices, Krause (2007) acknowledges the significance of process in this context and holds that process cannot be seen in isolation and that it complements the entire strategic momentum.

The researcher decided to follow the model as proposed by Valmra et al., (2006) in order to arrive at a model to be used in this study. A similar approach was used by Jansen Van Rensburg (2016) in his doctoral study at a South African university. This model combines the four components of SAP theory of Jarzabkowski, the taxonomy of sense-making and sense-giving of Gioia and Chittipeddi, and the managerial roles of Floyd and Lane as depicted in Figure 3.2. The current study builds on these conceptualisations to understand the micro-strategy implementation practices of the differentiated workforce even though this model was based on the TMT as practitioners. As was indicated earlier, the changing role and proximity of the differentiated workforce to TMT has broadened the tasks and operational responsibilities.

Figure 3.2: Components and Functions of Strategy Practices

The seven functions of practices/generic activities of strategy-making	The four components of SAP			
	Strategy routines	Strategy process concepts	Strategy tools	Behavioral norms and beliefs
Understanding the organization and the environment.				
Generating new ideas and initiatives				
Designing a strategy				
Communicating a strategic direction				
Making strategic decisions at any level of management.				
Agreeing about means of implementation				
Control and Adjustment				

Practices and Processes

Source: Valmra et al., 2006

Figure 3.2 depicts the interrelation between the four components of SAP and the seven managerial functions used during the strategy process of an organisation. The model highlights the organisational practices how the micro activities shape the strategy process and are shaped by micro activities. The first axis of the model is defined by the organisational practices made of the four parts of SAP namely,

strategy routines, strategy process concept, strategy tools and behavioural norms and beliefs. The second part consists of the seven managerial activities during strategy making. These are how sense making takes place, how the strategy is defined, how it is communicated, and the way in which decisions are made, how the strategy is implemented and lastly how it is controlled. Together it makes up the strategy practices and processes used to influence the strategy activity. By extending the managerial roles of strategy making and connect them to the different components of SAP to the activities of the differentiated workforce, the significance of this conceptual framework is to depict visually practices and processes in this research as utilised by the practitioners. This approach was used to define and link the practices and processes in use during strategy implementation process.

3.2.8. Summary of 3Ps

The literature review is an evaluation of the practitioners, practices and praxis on SAP which is used as a lens to analyse strategy implementation in the business insurance environment. It is a way of exploring the intangible actions and activities that make strategy implementation succeed or fail. Based on the literature regarding the formulation of strategy in the challenges to organisation brought about by the Fourth Industrial Revolution, it was deemed necessary to use SAP theories to further guide and critique the research and as the basis for the development of the research methodology used in the study. It is important to highlight that from the SAP approach; formulation and implementation are intertwined and cannot be separated from each other. The entire research, that is the research design, data collection, analysis, interpretation and recommendations, was drawn from the practice and process perspective.

3.3. SENSEMAKING

There is growing interest on sensemaking, looking et how sense is constructed in organisations, the impact of sensemaking on organisational processes that include strategic change and decision-making and sense making as an exploratory mechanism for strategic change (Gioia & Chittipeddi, 1991; Vaara & Kroon, 2013; Reup & Feldman, 2011). According to Rouleau and Balogun (2011), within SAP middle managers' sensemaking has been shown to be critical to the role they perform. Floyd and Wooldridge (2000) and Mantere (2008) argue that the middle managers' agency is a foundation for strategic renewal, a bottom-up process where strategy is adopted to a changing environment. Of particular importance to strategic renewal are the middle managers' practices of sensemaking, in terms of interpreting the intent to change, transmitting information, gathering and diffusing new ideas (Rouleau & Balogun, 2007).

SAP draws upon sensemaking and thecritical importance of cognitions and actions (Johnson et al., 2007). It is the process that people work through to understand issues that are confusing and novel or violate expectations, and is critically important in the study of organisations (Maitlis & Christianson, 2014). Regner (2003) contents that middle managers' strategy activities because lower level management has been found to play an important role in strategy development and renewal (Burgelman, 1983). Regner found that managers on the peripheries made sense of strategic issues (Weick, 1995) and that explorative and inductive practice seem critical to strategy creation and development.

3.4. USING SAP LENS TO STUDY STRATEGISING

SAP researchers, like Whittington (2004), Johnson et al. (2007), and Golsorkhi et al. (2015), encourage the expansion of already existing theories rather than attempt to pursue new ones, and argue for theoretical and methodological pluralism and multidisciplinary research. How does SAP align with current organisational and social theory perspectives? It has often been questioned what precisely the theoretical basis of SAP is. In their response to the question, Jarzabkowski et al.'s (2007) response is that the SAP stream is characterised less by which theory is adopted than by what problem it explains. To this end, contributions from a wide range of sociological and organisational theories have been recognised by SAP scholars (Jarzabkowski et al., 2007), on practice (Jarzabkowski 2003, 2005), on sense making (Rouleau, 2005), on culture (Melander & Norqvist, 2008), on power (Maitlis & Lawrence, 2003), on narrative (Boje, 1991; Weick, 1995; Rouleau, 2003; Czarniawska, 2004) and on discourse (Vaara, Kleymann & Seristo, 2004; Mantere & Vaara, 2008), among others.

With regard to the specific theories which complement the overall framing of SAP, a pluralistic and multidisciplinary view of SAP has informed this study. The outcome of SAP research, as stated by Jarzabkowski et al. (2007), needs to be related to the definition of strategy as a situated, socially accomplished flow of activity that has consequential outcomes for the direction or survival of the organisation. Therefore, the objective of strategising research is to explain some aspects of an activity which may be considered consequential at the chosen level of analysis.

A recent paper by Seidl & Whittington (2014) recognises ontological positions and theories that may enable researchers to link local strategising with larger social phenomena, stressing that micro-level strategising depends hierarchically on, and co-produces, larger macro structures and systems. Among some of these are perspectives and theories drawing on Giddensian Structuration theory; the activity-based approach; Foucauldian Discourse Analysis; Bourdieusian culturally-mediated dispositions; and narrative theory. The former two theoretical streams, that is, Structuration theory and Activity-based

approach have informed this study. In the following paragraph, these streams are described in order to exemplify how they can be applied within the broader SAP perspective.

Structuration theory (Giddens, 1984) has been extensively used by SAP researchers (Jarzabkowski, 2004; Whittington, 2006; 2007; 2010; Hendry, 2000, cited in Seidl and Whittington, 2014). This view articulates that the relation between the wider society and the micro-level strategising activities can be captured by focusing on management practices-in-use as the primary unit of analysis (Jarzabkowski, 2004). The underlying assumptions, according to Jarzabkowski and Whittington (2006), are that practitioners draw on the strategy practices that the organisation holds and their local actions are in fact a source of outcomes on many macro levels.

3.4.1. Theoretical base of the study

The current study is located within the domain of strategy practices as it relates to both the agents and the structures. Hence, a non-dualistic logic would be the most appropriate endeavour to deliberately investigate new understanding of human agency and strategic choice (Pozzebon, 2004). Similarly, because strategic management is a social activity, social theories can facilitate an understanding of SAP. Even though Giddens' theory of structuration (Ikavalko, 2005) is framed within a dichotomist world view, it does give rise to the ontological question of looking at strategy process as a social system. Accordingly, this brings new insights to the SAP discourse through the concepts of agency, structure and structuration.

3.4.1.1. Structuration theory

According to Ikavalko (2005), interaction between human agents, and the structure of social systems are the predominant characteristics of Giddens' structuration theory. Central to this theory is duality which implies that structure is seen both as the outcome and the medium of interaction. For example, as a medium, structure provides the rules and resources for the interaction of individuals. Similarly, structure can function as outcome by means of the interaction in which the agents engage. Therefore, by focusing on the intersection between these two realms, this dualistic view connects deterministic, objective notions to the voluntaristic, subjective and dynamic view.

Agent and structure are the two main elements here. Firstly, recursively organised sets of rules and resources can form structure. As such, structure is out of time and space, save in its instantiations and co-ordination as memory traces, and is marked by an absence of a subject (Giddens, 1984). The situated activities of human agents, reproduced across time and space, are reflected by the social systems in which structure is recursively implicated. To this end, Giddens points out that through the

modes in which they are produced and reproduced in interaction, the analysis of the structuration of social systems can be performed.

Secondly, human beings are able to elaborate upon reasons because they are purposive agents who reason about activities. A continuing "theoretical understanding" of the grounds of their activity is maintained by the actors themselves. Simply, they are able to explain what they do, if asked. To explicate reasons, and to supply the normative ground whereby they may be justified, demonstrates that one is accountable for one's activities (Giddens, 1984).

Furthermore, structure is always both enabling and limiting. This means that in the social sciences there is no such entity as a distinctive type of "structural" explanation. All explanations, in this regard, will involve at least an implicit reference both to the purposive, reasoning behaviour of agents and to its intersection with constraining and enabling features of the social and material contexts of that behaviour (Giddens, 1984). In fact, depending on the context and nature of the sequence of action and on the motives the agents have for what they do will influence whether structure is constraining or enabling.

Choosing a structuration approach in the conceptualisation of this study supplied a sound basis from which to select, and to research, the structuration of a social system with a group of reasoning actors. Strategy process, as a social system, is produced and reproduced, and appears as rules and resources through the activities of the differentiated workforce. The activities of the differentiated workforce, and the way an organisation formulates and implements its strategy, are both enabled and constrained.

Structure and agency, as identified by structuration theory, are linked by modalities. Relating the knowledgeable capacities of agents to structural features, the modalities of structuration serve to clarify the main dimensions of the duality of structure in interaction. According to Giddens, in the reproduction of systems of interaction and, in the similar way, reconstituting their structural properties, actors draw upon the modalities of structuration. Signification, domination and legitimation are structural dimensions of social systems that appear as rules and resources. These three forms of interaction are analytically connected with corresponding structural dimensions of social systems. Signification refers to a system's discursive and symbolic order in the form of rules governing the types of image, talk and jargon that predominate. Legitimation refers to the regime of normatively sanctioned institutions, i.e. rules that extend from formal legal constraints and obligations to the kinds of unwritten codes that are embodied in an organisation's culture. Lastly, domination refers to allocative and material resources which concern the state or the firm or political and economic institutions. Discourse, power and institutional legitimacy are the three dimensions that link

structuration theory with these modalities which are the focus of organisational and management theory.

Through the key notion of duality of structure, by an assertion of their mutual dependence, Giddens means to replace the traditional dualism (opposition) between structure and agency. This means that the structural properties of a system are both the medium and the outcome of the practices they recursively organise. These structural properties are crucial to action, and at the same time are being produced or reproduced by this action. Structure, therefore, does not have just the sense of constraint implied by social theories that stress ideological hegemony and unequal distribution of resources. More importantly, as it furnishes both the resources that make action possible and the rules that guide it, structure is also enabling.

3.4.1.2. Activity-based theory

This theory is about the study of practice as a flow of activity. It involves daily organisational activities as they relate to strategic outcomes. SAP scholars, such as Johnson et al. (2003), Whittington et al. (2004), and Jarzabkowski (2005), note that these activities are demonstrated in the shape of many organisational processes and practices. Within this context, therefore, the day to day actions of management can be seen as activity, and what Johnson et al. (2003) describe as the wider engagement by organisational actors. The main features of activity-based theory can be summarised as follows: 1) It conceptualises organisational activity widely (Jarzabkowski, 2005); 2) It is a multi-level phenomenon, involving diverse practitioners; 3) It is performed by organisational actors; 4) It activates focus on strategic outcomes of significant interest; 5) There is some notion of intentionality, which means that activity is intended to lead to a certain outcome that will in turn be consequential for the organisation as a whole (Jarzabkowski, 2005).

Who contributes to the activity, how it is constructed, what dynamics of influence shape the activity, and what consequences can be analysed are recorded by (Jarzabkowski, 2005). A key feature of the activity view is the reciprocal nature of strategy-making practices. By giving TMT agency, they enable activity to shape managerial agency. Another important feature of this activity framework is that it allows the researcher to identify the overall dynamics of the activity system occurring between all the elements of the framework such as top managers, the organisational community and the strategising practices. An overall activity-based view of strategy making over time regards strategy as a pattern in a stream of goal-directed activity. Owing to these features and the combination of strategising practices around the activity system, the shaping of strategy tasks is the responsibility of all organisational actors and community at all levels within the organisation, and not only TMT.

In this section, SAP is comprehensively and critically discussed as a relatively recent concept within management research and practice and placed in an historical context in this section. More importantly, various misunderstandings and potential conflicts between the concepts of strategy and SAP are further clarified and discussed by systematically comparing and contrasting the main features of the two concepts.

3.5. CRITICAL REFLECTION ON THE STRATEGISING PERSPECTIVE

Research around the strategising perspective has provided a number of theoretical, conceptual and empirical insights (e.g. Balogun et al., 2003). It is important to highlight that in recent years, the number of empirical studies on strategising has increased considerably. Regner (2003) investigates managerial actions in the centre and periphery of four multinational firms. Jarzabkowski (2003) studies top management team strategy practices in three universities. Oakes, Townley and Cooper (1998) research the practices around a new business planning model in Canadian museums. Maitlis and Lawrence (2003) analyse the failure of members of a British symphony orchestra to construct an artistic strategy for their organisation. In all these, failure in organisational strategising can be understood as resulting from the interplay of certain elements of organisational discourse and specific kinds of political behaviour, yet in these studies the authors did not study the micro-level characteristics of how strategists actually think and act strategically in the strategy process of the organisation. There remain some unanswered questions and gaps in this emerging stream of research. The present study attempts to answer these questions.

Even though empirical studies in the SAP area (e.g., Maitlis and Lawrence, 2003; Oakes et al., 1998; Salvato, 2003; Samra-Fredericks, 2003) are increasingly providing rich accounts on strategising, research interest still focuses on the activities of a single group of actors. More importantly, these studies are to a large extent silent about the way different groups interact during the strategy process. Yet, arguably in complex organisational settings, strategy making and implementation are rarely the responsibility of one group of actors representing a single organisational level. According to Greve (2003), multi-business organisations are defined as organisations that operate in multiple markets through several distinct units. Paroutis (2006) reports that the complexity and multitude of such organisational settings inevitably influence the way researchers approach and study strategising practices. Pettigrew (1997) also subscribes to this view. This single perspective suggests the importance of examining these practices at multiple organisational levels, representing different contexts. In such settings, for instance, strategising practice comprises the interactions of diverse and distributed groups of individuals and ongoing activities. Interactions between diverse groups from various organisational levels are pivotal in maintaining, renewing and developing strategy.

Consequently, this study focuses on the actions, activities and interactions of the differentiated workforce in strategy making and strategising within high performing organisations to provide baseline information that can be used for further research.

As previously noted, Melin, Ericson and Mullern (1999) state that studies on strategising focus on the way strategies evolve over time. This means the way strategies are realised, developed, transformed and reproduced in an ongoing process together with changes in organisational form and structure. Thus, the importance of the practice approach lies not only in the examination of practitioners' thinking and acting, but on the potential relationship of the practicing process with the strategy process in its changing context over time. Jarzabkowski (2004) justifiably concludes that contextual factors can be linked with more adaptive or recursive uses of management practices, and therefore prompt questions about the comparative characteristics of the organisational context. What characteristics of the within-firm context, such as diversity, power, structure, and culture are related to more adaptive or more recursive uses of a particular management practices? In this case, as Pettigrew (1992, 1997) and Thomas (2001) claim, the more useful knowledge is gleaned from those strategy process studies which analyse sequence of incidents, activities and actions, and the context in which these actions are situated. In this way, a better understanding of strategic practice activity is obtained when researchers consider the particular contextual characteristics in which activities occur. This new need to understand the strategy process calls for an examination of the activities of managers not only in decision-making, strategic planning or problem solving but also by taking into account the multifaceted nature of everyday strategising practice in context.

Yet, there is limited theoretical and empirical understanding offered within the strategising view on a) the way strategising links to the context in which it occurs and b) how strategising and organising are both related to change over time. Drawing on, amongst others, the theory of complementarity, Pettigrew et al. (2003) and Whittington and Melin (2003) provide an important theoretical contribution to the dual appreciation of organising and strategising. This study attempts to develop further these contributions by providing a set of empirical evidence about the dynamic interrelation of changes in strategising and organising within diverse organisations.

Another area where the strategising perspective has yet to offer any concrete theoretical or empirical findings lies in the domain of the skills and knowledge practitioners require to practise strategy. In 2003 (p. 117), Whittington asks: "What are the skills required for strategising and organising work and how are they acquired?" This study tries to address this gap in the literature by providing a theoretical framework and empirical evidence around the capabilities required during strategising.

Building on the above-mentioned limitations and gaps within the strategising perspective, the current study is specifically concerned with the making of strategy as an ongoing process and practice in context (Webb & Pettigrew, 1999). This approach is developed across the following areas where previous research provides a limited theoretical basis and empirical evidence: a) the practices of the differentiated workforce; b) the processes of strategy-making within the insurance industry in South Africa; c) strategy implementation within a rapidly changing business environment.

3.6. CONTRIBUTION OF THIS RESEARCH

Primarily, the main research question of this study is; what practices are employed by the differentiated workforce in general, and in selected strategic jobs in particular, towards strategy implementation in the insurance business context?

In responding to the call for more research based in strategy implementation practice, this study utilised SAP approach to investigate the locally institutionalised practices rooted in the organisational reality, culture and routines. This research explored the micro-level practices of individual non-managerial professionals in key positions and how these practitioners shape strategy implementation in their organisational positions.

The unanswered questions stated in the extant body of knowledge as specified by SAP scholars such as Jarzabkowski (2001), Whittington (2006), Jarzabkowski and Spee (2009), Feldman and Orlikowski (2011) and Vaara and Whittington (2012), and the way this research attempted to answer those questions are depicted in Table 3.1.

Table 3.1: The unanswered questions on SAP research agenda

Source	**Questions posed**	**Answers supplied by the present work.**
Jarzabkowski (2001)	Can business studies be practical and more useful for organisations?	The study looked at institutionalised strategy making practices of the differentiated workforce within an organisation as embodied in organisational reality, culture and routines of the selected organisations (institutionalised) and report on the lived experiences of the differentiated workforce instead of abstract practices.
Whittington (2003a)	Can more strategists be researched strategy into SAP research frame?	As the focus was on the differentiated workforce strategising roles in implementing strategy with a focus on the routine daily realities of actors, the research was humanised.
Whittington (2003b)	How is the work strategising done and where? Who are the people who do the strategising work? For strategy work, what are the tools and techniques used to support strategy work? The work of strategising, how is strategy work organised? Products of strategising, how are they consumed and communicated?	This work researched the key non-management professionals as a group of actors and the way they made strategy through exploring their strategy making practices. These practices were explained by the practitioners themselves explained the stuff they use to do their strategy work in terms of how they made use of and communicated the socio-material artefacts in their strategising practices.
Jarzabkowski and Spee (2009)	Strategists, what do they do? What is the impact of the individual actors on the way the organisation shapes strategy?	The present research asked how the participants, the differentiated workforce, strategise. Rich descriptions of the practices were furnished and a clarity of what practitioners do within their work environments as they do strategising was enabled by the methodology used. How individual actions and interactions and actions shape and mould the business key players were examined.

Feldman and Orlikowski (2011)	Prevailing organisational and societal practices, how do they enable and constrain action of the organisation?	This study recognised the enabling and constraining conditions within the unique SA insurance business organisational context that influence strategy making practices of the differentiated workforce within insurance industry.
Vaara & Whittington (2012)	Which practices are strategic? How do they influence organisational success or survival?	

The current study affords understanding into the strategy implementation practices of the differentiated workforce in the insurance business context. Similarly, it contributes to theory development on the conditions that enable and impede the strategy implementation practices of the differentiated workforce. Lastly, the study provides insight into how the differentiated workforce engages with the materiality of strategy implementation work.

3.7. CHAPTER SUMMARY

The aim of this chapter was to offer a review of the existing body of knowledge on the SAP view. SAP was introduced as a result of an activity-based approach. A detailed description of the SAP school of thought and the contribution of the SAP research agenda was presented. The three elements of SAP were explained. Structuration theory and activity theory were presented as the theoretical base of the study. A critique of SAP perspective rounds off the chapter.

SAP offers support in favour of social practices in strategy, thus moving away from the focus on economic performance. By advancing sociological theories in strategic management, SAP presents alternative outcomes to economic performance, expands the empirical contexts of strategy research, and promotes new methodologies for investigating strategy and strategy implementation in particular. This approach offers the potential to identify the enabling and hindering aspects of strategic practices, the role of skilled performance in changing the course of events, and the social construction of strategy practitioners.

In this study, the in-depth analysis of the micro strategy-making practices of the differentiated workforce has practical implications for organisations. SAP research has the potential to contribute to research that is practically relevant. An analysis of organisational practices and how practitioners at times pause to do strategy is important in providing insight into researchers to gain an understanding of how organisational practices create the foundation of organisational success. According to Vaara and Whittington (2012), such scrutiny may assist in understanding how and why some practices come to be regarded as strategic.

The next chapter will review the literature on the differentiated workforce. It focuses on humanising strategic management through the micro-strategising practices of agency within an organisational social structure in a changing environment.

4. THE DIFFERENTIATED WORKFORCE PERSPECTIVE

4.1. INTRODUCTION

Building on the work of Huselid and Becker (2011), Becker et al. (2009) and Huselid et al. (2005), scholars have suggested that strategy executors have an important influence on the success of an organisation and are found at various levels of a company including TMT, middle management and the workforce (Li et al., 2008). The quality of people involved in the strategy implementation process affect, at least in part, an organisation's effectiveness (Govindarajan, 1989). In this regard, quality refers to attitude, capabilities, skills, experiences and other characteristics of people required by a specific role (Peng & Litteljohn, 2001). Viseral, Baines and Sweeney (2005) indicate that, in general, key success factors can be classified into organisation, systems and people in the manufacturing environment. The authors conclude that strategy implementation success depends mainly on the human side of project management and less on the organisational and systems related factors. Harrington (2006) also subscribes to this view, pointing out that during strategy implementation, people's level of involvement has a positive effect on the success of strategy implementation.

Although some conceptual research has been conducted on the influence of the differentiated workforce in the SHRM field, no research articulates a link between the differentiated workforce and strategy implementation, which is a major element of the strategic management process. Based on the rationale outlined above, this study argues that the differentiated workforce not only affects strategy formulation, but also strategy implementation. The role of the differentiated workforce will be discussed in more detail in section 4.2.

4.2. THE DIFFERENTIATED WORKFORCE AS PRACTITIONERS

As previously indicated, the strategy process tradition provides the core theoretical framework of SAP theory which serves as the foundation on which this study is built. In the literature review, there are often many references to the practitioners, that is, the people who are actually doing strategy. In this study it is crucial to distinguish the "who" and attempt to link it to the conceptual framework that was undertaken. Within the context of this research, the practitioners are characterised as those implementing strategy. In this case the differentiated workforce are the people appointed into key strategic non-management professional positions and who have a direct influence on the execution of strategy.

4.2.1. Position of differentiated workforce

Recent advances in strategy implementation research specifically stress the role of the involvement of the workforce in determining the organisation's vision, purpose, and organisational form (Liedtka, 2000a, b; Collier, Fishwick & Floyd, 2004; Jarzabkowski, 2008). While strategic management research has emphasised visionary concepts, strategy work deals with concrete actions and the need to involve the workforce in the achievement of the organisation's business vision (Mintzberg & Lampel, 1999; Krause, Harms & Schwartz, 2006). Several scholars [e.g., Grundy & King (1992); Love, Priem & Lumpkin (2002); Miller, Wilson & Hickson (2004); Collier et al. (2004)] continuing with this line of reasoning, argue that participative strategic planning can influence the success of implementation and therefore improve organisational performance. Because participative strategic planning clarifies and explains company mission, this results in increased workforce commitment to strategy implementation (Liedtka, 2000a, b). In similar fashion, Mantere and Vaara (2008) point out that participative strategic planning fosters an understanding of company strategy, and enables TMT to reach consensus about strategy (Wooldridge & Floyd, 1990).

In this chapter, using the SAP perspective, the focus includes both TMT and middle management as well as the professional non-managerial workforce, that is, the differentiated workforce. As was previously suggested, the present study explores what the individual practitioner does and how this doing shapes strategy implementation work at both the micro- and meso (praxis) levels. In particular, this study investigates the differentiated workforce and its strategy implementation practices. A growing body of research argues that during these challenging economic times, key employees in strategic positions could represent a significant competitive advantage (Becker & Huselid, 2006, 2010; Boudreau & Ramstad, 2005). In line with this view, Jack Welch, former GE CEO, asserts that holding the workforce accountable for strategy implementation is imperative for any organisation's success (Huselid et al., 2005; Becker et al., 2009). Importantly, it could therefore be argued that the actions of the differentiated workforce in any organisation also influence how strategy implementation is practised, thus impacting on the performance of the organisation.

Taking this as a starting point, Chapters 1, 2 and 3 outline how the differentiated workforce functions in action, and how they practise strategy implementation through daily interactions and experiences. This section reviews the extant literature on the differentiated workforce, in particular those employees in key positions, and their strategic roles in strategy implementation practices. Furthermore, this section will review how the differentiated workforce interacts and engages with material aspects such as the talk, text, and tools of strategy implementation work.

To reiterate, strategic management, as a management process, ensures successful strategy making and implementation that involves many activities. The role allocation of these fundamental activities, as already indicated, has led in the past to debates with variously conflicting views. One of these debates relates to conflicting views about who is responsible for strategy implementation activities in organisations. There is a substantial amount of research on top management's strategic roles in strategic management. This was elaborated on earlier. While TMT have recognised formal strategic roles, Balogun and Johnson (2004) maintain that middle managers' and other actors' strategy creating and executing actions are often informal, occurring across many different organisational subunits throughout the strategy process. Several middle manager researchers (Lechner, Frankenberger & Floyd, 2010; Huy, 2011; Rouleau & Balogun, 2011) echo these views. These scholars argue that to influence the development of an organisation's competitive advantage, middle managers draw on a diverse set of resources and skills. Given the fast-changing strategic context in which many organisations operate, there is increasing acknowledgement that advancing research on middle managers, strategy, and strategy change is important. As a result, SAP research on middle managers has burgeoned (e.g., Basson & Mahieu, 2011; Thomas, Sargent & Hardy, 2011; Beck & Plowman, 2009; Nielsen, 2009; Hoon, 2007) since Balogun and Johnson's (2004, 2005) original work on middle managers and strategic change. The limited number of studies published in South Africa focused, variously, on middle managers at a university in South Africa (Davis, 2013), a SAP approach within an engineering organisation (Sithole, 2011), a SAP view to business rescue (Pretorius, 2013), a SAP perspective on ICT analysis (Govender & Pretorius, 2015), and SAP approach in a Defence Evaluation and Research Institutes context (Jansen Van Rensburg, 2016). In sum, to a large extent, the extant literature still considers strategy as an upper echelon practice with formulation vs implementation duality, predisposing a focus on management. Considering the nature of contemporary pluralistic organisations characterised by knowledge-based work processes, multiple objectives, and diffuse power, the synergy of all stakeholders of the organisation is even more important.

As already indicated, in terms of lower management supervisory positions at professional and non-management levels, few researchers have investigated their effect on strategy implementation. According to Gronroos (in Rapart, Lynch & Suter, 1996), an organisation must first persuade its workforce about the importance of strategy before turning to customers. Alexander (1985), continuing with this line of reasoning, argues that there are many problems which more than 50% of organisations experience in their research: departmental managers provide inadequate leadership and direction; involved employees have insufficient capabilities to perform their jobs; and lower-level employees

are inadequately trained. These three issues are the most frequently cited strategy implementation problems in relation to the workforce.

Line-level employees may use delay or prevent attempts toward change they find particularly threatening or disagreeable. This lower-level "obstructionism" that is prevalent in much strategy implementation, as Nutt (1986) suggests, can be overcome by managerial tactics and leadership style. Nonetheless strategic decisions are formulated by TMT, then administratively imposed on the workforce, with little consideration of the resulting functional-level perceptions (Nutt, 1987). However, if employees are not aware of the same information, or when information must go though many management layers in the organisation, consensus may never come about. Hence, the lack of shared knowledge with employees creates a barrier to successful strategy implementation (Noble, 1999).

In line with the SAP perspective, strategists consists of a much broader and diverse group of actors – analysts and regulators, managers at multiple levels of the organisation, the board of directors as well as influential external actors such as consultants. Increasingly, SAP studies indicate the importance of including non-management professional levels and lower level employees (the workforce), as strategic actors. By identifying the differentiated workforce as strategists, in particular the strategic employees in key jobs, the research agenda expands beyond top managers and middle managers.

A growing number of researchers have highlighted the importance of the workforce in competitive strategy. To this end, research and practice have revealed that strategic decisions can and do occur across organisational levels (Burgelman, 1994, 2002; Floyd & Lane, 2000; Mintzberg, 1987; Mintzberg, Ahlstrand & Lampel, 1998; Nonaka, 1988; Wooldridge & Floyd, 1990). Mintzberg et al. (1998) provide evidence that informed individuals at any level in the organisation can contribute to the strategy process. They also assert that it is often the foot soldier on the firing line who is closest to the action who can influence strategy. The workforce is continuously in touch with the customers and thus may be able to explain the desires and needs for new products and services more effectively than employees at any other organisational level (Mintzberg et al., 1998). The current research project situates itself in support of this perspective that the workforce has a significant role in helping the organisation develop its competitive strategy. Yet, our understanding about the role of the differentiated workforce within the strategic management field remains limited. The research questions we therefore try to address in this work attempt to bridge a critical research gap. In so doing, this research investigates the actions and interactions of the differentiated workforce as key strategy actors in a cross-sectional study within two insurance organisations in the domain of the financial services sector in South Africa.

4.2.2. Clarifying the concept of the differentiated workforce

At a glance, the concept seems to have been implemented in many different ways in organisational practice. For example, organisations distinguish between white-collar and blue-collar workers, low-level vs. high-level professionals, middle/senior managers and non-managers, and low and high performers. In addition, organisations also differentiate between employees with commodity-like abilities, younger and older employees, and different employee groups.

In contrast to the preceding view, according to Huselid and Becker (2011) and Becker et al. (2009), the differentiated workforce is defined according to their contribution to the implementation of strategy and, consequently, to the company strategic goals and objectives. To this end, HR policies react to these needs and translate them into diverse HR tools and instruments based on this classification. The "A"-Players are the key employees who are critical in achieving competitive advantage (Huselid et al., 2005; Becker et al., 2009). In other words, not all employees have the same strategic relevance and significance to organisations. According to Huselid and Becker and their associates (2005, 2009), this requires segmenting according to company plans. As strategic capabilities differentiate organisations from their competitors, they then generate an idiosyncratic fit to HRM (Becker & Huselid, 2003).

The implications of these conclusions are profound for organisations. Beatty & Schneier (1997) highlight that HRM should particularly take note of the core competency workforce. The authors point out that these are the high leverage positions with a direct impact on the organisation's strategic success. Other authors such as Lepak and Snell (1999) and Wright, Dunford and Snell (2001) support this view, arguing that the different value of the workforce should be reflected by managing employees differently. And this could be achieved by a varied architecture of HR practices for these key employee groups based on uniqueness of skills and strategic value of human capital. Hence Becker & Huselid (2006) report that to enhance competitiveness, HR functions should apply a greater emphasis on differentiation as a main strategic opportunity.

Other scholars, especially from consulting firms, e.g., PwC, Deloitte, Accenture, KPMG etc., have come to the same conclusions regarding the importance of a more differentiated approach. In principle, there are a few crucial employees who have a major impact on their firm's business results. According to Terylyz from Hewitt Consulting, these are the people who excel at their work and make the most money for the organisation. Table 4.1 summarises some of the main arguments from this section.

Table 4 1: A summary of key differentiated approaches and their characteristics

Author	Main Characteristics
Lepak & Snell (1999;	Differentiation based primarily on employee features, such as value of knowledge and skills. Employees with the most valuable and unique skills are considered strategic assets for the company. Skills and knowledge are valuable if they improve effectiveness and efficiency of the firm, let the firm exploit market opportunities, and neutralise potential market threat.
Collings & Mellahi	Differentiation based on identification of key roles, or pivotal talent positions; allocate talent management resources to employee groups with high strategic contribution; talent pools ensure that these roles can be filled. Finally establish an adequate, differentiated and commitment- oriented HR architecture. Key positions are not necessarily top positions.
Huselid et al. (2005), Becker & Huselid (2006), Becker et al. (2009) and Huselid and Becker (2011)	Differentiation is based on value of the job or role; key employees contribute to strategic objectives and their behaviours become a complement to effective strategy implementation ("A- Positions"). Value and uniqueness of skills and knowledge are secondary aspects. Strategic value of a job not bound on level. Performance variability In strategic roles is a linchpin for HRM.

Source: Adapted from Weis and Schaefer (2012, p. 60)

It should be emphasised that from a SHRM perspective workforce differentiation completes strategic planning even though it is not about strategic planning. Thus, an organisation that conducts workforce differentiation, it is assumed, actually has a competitive strategy in place, either explicitly or implicitly. To this end, workforce differentiation is derivable from having a competitive strategy in place. Applying workforce differentiation is likely to lead to a reconsideration of certain assumptions within strategic planning (Becker et al., 2009; Huselid et al., 2005). Overall, Buller (1988) indicates that it should lead to a more integrative linkage between strategic planning and HRM.

Although there is a dearth of reliable extant literature on the practical application of workforce differentiation, a notable highlight can be found. Brush and Ruse (2005), for example, describe how Corning utilises what they call segmentation to align HRM. To make informed allocation decisions and portfolio investments, the HR function, in Brush & Ruse's scenario, realised that it has limited resources to invest (Brush & Ruse, 2005). To achieve organisational goals, the authors define four segmentation areas that reflect relative value. The respective roles were analysed in terms of the

following: what is needed to implement strategy; or what are the non-core roles that are only affected by the strategy. In order to create insight into the connection between workforce elements and strategy, Boudreau and Ramstad (2005) also propose to apply talent segmentation. These would be tailored talent pools by differential contribution to strategic success rather than their place in the hierarchy. The authors conclude that organisations should invest in the talent pools that lead to the most significant contribution to strategic success.

The next section continues with this theme and contextualises the discussion within the SHRM domain, linking strategy, human resource management and performance.

4.2.3. Strategy and Human Resource Management

Although a detailed discussion of the field of strategic human resources management (SHRM) is beyond the scope of this research, a brief introduction of the central and interesting concepts of the developing field can be made. The discussion that follows is therefore not intended as an encyclopaedic analysis of prior work but will emphasise the most pressing theoretical challenges facing SHRM, describing the "black box" that explains the strategic logic between an organisation's performance and HR architecture. How does the logic of this "black box" explain workforce's contribution to an organisation's sustained competitive advantage? That is the focus of this study and it is something that strategic management has not paid much attention to. More specifically, this study argues that the alignment between the workforce via the strategic capabilities and the business operational processes that implement strategy is crucial for organisational success. This neglected approach is the foundation of HR's contribution to competitive advantage. Lepak and Snell (1999) posit that an increasing level of differentiation will be required to achieve such a competitive advantage.

According to Boxall, Purcell and Wright (2007), SHRM focuses on the overall HR strategies adopted by organisations. In the literature, the SHRM label has been assigned to a way of managing people in line with how the organisation's goals will be achieved through its human resources by means of integrated HR policies, practices and strategies. It is based on the following propositions:

- The human capital resources are strategic for business success;
- A fit between HR plans and business strategies is crucial;
- Human resources are key to competitive advantage;
- Business strategy is implemented by the workforce;

- HR strategy planning and implementing should be adopted using a systematic approach.

Conventional wisdom indicates that human resources lead to superior organisational performance. In the literature, it has long been established that HR is a potentially viable means of promoting and sustaining corporate competitiveness. Several SHRM scholars and consultants actively promote differentiation, also referred to as segmentation, and consider it essential to business success (Becker et al., 2009; Boudreu & Ramstad, 2007; Lepak & Snell, 1999). Nevertheless, empirical studies of HRM systems have paid less attention to intra-firm segmentation of employees. Thus, even as meta-analysis reviews draw conclusions about the determinants and outcomes of HRM systems (Combs, Liu, Hall & Ketchen, 2006; Jiang, Lepak, Hu & Baer, 2012; Subramony, 2009), the generalisability of such conclusions to specific workforce segments remains unknown.

Theories of strategic management have traditionally recognised internal activities as potentially crucial sources of competitive advantage. Porter's (1985) influential work on competitive advantage supports this view. According to Barney (1991) and Grant (1996), subsequent strategic management work, in continuing this line of reasoning, argues that internal resources are essential in building and sustaining competitive advantage. This view is further corroborated by Wright et al. (2001) who point out that the role of the organisation's workforce is central in creating superior performance through human and social capital. Although the actual modalities by which the workforce impacts on organisational performance are not understood (Collins & Smith, 2006; Guest, 2011; Paauwe, 2009), there is growing evidence that HRM practices can positively affect organisational performance (Boselie, Dietz & Boon, 2005; Combs et al., 2006; Huselid, 1995). In order to help us understand how the workforce impacts on organisational performance, in the next sub-section, strategic roles and strategy are discussed.

4.2.4. Strategic roles and strategy

Mintzberg (1973) refers to the term "role" to represent activities of affinity groups of management. Similarly, he utilises the term "strategic role" to categorise the activities of affinity groups that influence organisational strategy. Arguably therefore, a strategic role would involve taking action and processing information that impacts on organisational change. According to Floyd and Lane (2000), strategic roles are related across organisational levels since they involve the acquisition and exchange of information, while on the other hand, operational roles are concerned with the daily routines that result in delivering services to the organisational members. Operational roles are short term and focused on routines, while strategic roles involve forecasting actions over the long term. As identified

by Leana and Barry (2000), both operational and strategic roles, like the balance between managing stability and change, are equally important for organisational survival. In today's complex adaptive business environment, strategy, according to Eisenhardt (1998) and Mintzberg (1987), is less well planned and more emergent. Mintzberg (1987) notes that as strategy becomes less planned and more emergent, this could result in the lines between operational and strategic roles becoming confused and blurred. Despite the fact that there is a substantial amount of research on TMT's strategic roles, as previously indicated, in the same vein all organisational members have roles in change. On the basis of their findings in a comparative study of six diverse organisations, Lawrence and Lorsch (1969) conclude that in organisations with high levels of environmental uncertainty member involvement in strategic decisions improves organisational performance.

Importantly, strategic roles form a network of interactions that can result in a series of strategic decisions. According to Kotter (1996), recognising small victories on the road to strategic renewal helps members gain momentum to enact large-scale changes. Over the years, strategy scholars have gone to great lengths to explain that strategy neither starts at the top nor ends at the bottom but is a dynamic process of integrating actions (Burgelman, 1994, 2002; Floyd & Lane, 2000; Mintzberg, 1987; Mintzberg et al., 1998; Nonaka, 1988; Wooldridge & Floyd, 1990).

There is a gap in the empirical research with regard to the strategic roles at all organisational levels, with a bias towards top and middle management levels. The research on strategic roles seems to be hierarchical as well. There are fewer studies as one moves downward to focus on the workforce and non-management levels. Hence strategic roles at the workforce level still remain unexplored. Guided by his dissatisfaction with the current theory on management, Burgelman (1996) questions the conclusions of TMT's strategic role. He conducted a longitudinal study of Intel's strategic business exit from memory chip manufacturing that included three levels of management and the product team members. Intel structured its organisation according to product teams which were at workforce level. However, he did not distinguish the roles of the workforce level from those of first-line managers. Hence the conclusion that, while strategy can be planned, it can also be emergent (Mintzberg, 1983). To this end, uncovering the differentiated workforce's strategic roles will contribute to the understanding of strategy implementation.

The following section looks at strategy practitioners' research within the discipline of strategic management.

4.3. STRATEGY PRACTITIONERS IN MAINSTREAM STRATEGY

What is known about strategy practitioners, and who are they? More importantly perhaps, for the purpose of this study, what roles do the differentiated workforce fulfil in strategy implementation within the insurance business organisations in South Africa and similarly, what are the strategy implementation practices of the differentiated workforce in general? A comprehensive review of the existing knowledge base on strategy practitioners is provided in this section. It offers an integrated overview of previous research on strategy practitioners and also provides an explanation of the strategy practitioner perspective. This section draws from the existing body of the extant literature review, despite the fact that scholars such as Jarzabkowski and Spee (2009), and Cunningham and Harney (2012), argue that within mainstream strategic management literature, strategy practitioners as individuals are still absent. In addition, the SAP literature will be analysed to determine its stated aim of getting close to the strategy practitioner. This section will close with a summary of what has been learnt from the literature review, thus laying a foundation for, and a logical starting point of this work.

4.3.1. Mainstream strategy research

To clarify, within the diverse streams of strategic management, there are no clear cut boundaries. In this section, strategy practitioners are investigated within traditional strategy research. This research, as identified by Rajagopalan et al. (1993) and Mellahi and Sminia (2009), has generally been conducted within the traditional areas of strategy content and process research. As already mentioned, strategy content research, according to Fahey and Christensen (1986), is typically focused on the "what" part of strategic management, that is, on the goals, scope and/or competitive strategies of organisations. In contrast, processual research focuses on "how" strategies are developed or emerge within organisations (Mellahi & Sminia, 2009). To reiterate, the content stream of research means that strategy practitioners as individuals are not of significant interest and are hence absent from the vast majority of research within this domain. However, strategy practitioners first became a central focus of the more current research agenda within the process research (McEwan, 2016).

Process research, as Mellahi and Sminia (2009) reveal, has its roots in the notion that rational decision making is not backed up by empirical reality. These authors are of the opinion that this belief could be traced to the works of Simon and Simon (1958) and Cyert and March (1963) who were prominent within the Carnegie School tradition. According to Mellahi and Sminia (2009), research into the processes that developed strategy was plagued by incoherence and contradictions.

In the early stages, the role of individual strategy practitioners was of little interest to process research. Rajagopalan et al. (1993) reviewed publications on processual literature and claim that the majority of the studies embrace theoretical models at macro or organisational level rather than taking a micro

view. This is reflected by the inclusion of macro-level criteria related to individuals such as Top Management Team characteristics, level of political activity and participation, and moreover in the absence of strategy practitioners per se from the framework developed by Rajagopalan et al. (1993). Again, at the time, process research viewed strategy practitioners collectively as a group, not as idiosyncratic individual practitioners. Further, in the review by Rajagopalan et al. (1993), the words “strategist” and “strategy practitioner" are not even referred to.

Two related streams of research in particular took a keen interest in strategy practitioners within strategic management process research. According to Narayanan, Zane & Kemmerer (2011), the research into managerial cognition was the first stream that sought to understand the role that mental models of managers have on strategy making. The stream identifying the characteristics of senior executives and their influence on strategy and organisational outcomes followed. This research, as suggested by Finkelstein, Hambrick and Cannella (2009), became known as TMTs, and used terms such as “upper echelons”. As McEwan (2016) points out, these two streams of research sought to explain firm performance in terms of individual or groups of individuals involved in strategic management.

A number of scholars (e.g., Schwenk, 1984, 1985; Lyles & Thomas, 1988; Rajagopalan et al., 2003) also observe that within the field of strategic management strategic decision making is often complex involving uncertainty and ambiguity. At the individual level, Walsh (1995) states that the managerial cognition approach considers that managers spend their time processing, disseminating and absorbing information. But as many scholars have observed (e.g., Starbuck & Milliken, 1988; Walsh, 1995; Weick, Sutcliffe, & Obstfeld, 2005), they face complexity, ambiguity, imperfect information, and a plethora of new data.

Gary and Wood (2011) state that in a knowledge or business context, knowledge structures are simplified representations about how the business environment works. Following from this, de Wit and Meyer (2010) reveal that logically they develop over time through activities such as experience and education and act as information filters, steering an individual’s attention towards significant information. Arguably therefore, within this context, as Gioia (1986) and Walsh (1995) point out, knowledge structures can be a two-edged sword since they facilitate speed of action while also allowing blind spots and bias to develop. According to Kaplan (2008), knowledge structures are thus used as a means of interpreting, framing and understanding problems in a way that makes sense to each strategist.

Research into TMTs was the second key stream of research to focus on strategy practitioners. The work of Kotter (1982), as well as Hambrick and Mason’s (1984) seminal article on “upper echelons”,

developed this stream as a separate theoretical field within the strategy cognition literature (Finkelstein et al., 2009). During the 1970s and 1980s, strategy researchers viewed strategic decision making as an activity influenced by individuals and, as such, embarked on studying high-ranking managers as the main influencers of strategic focus. In contrast to these views, Finkelstein et al. (2009) observe that subsequent research in the 80s sought to link emerging interest in TMTs with individuals. In other words, these researchers emphasised that strategic decision making is a shared activity rather than the domain of the lone CEO. Hambrick and colleagues (Hambrick & Mason, 1984; Hambrick, 2007; Michel & Hambrick, 1992) focused on the top leadership group within an organisation as they moved beyond a focus on CEOs.

Hambrick and Mason's (1984) seminal paper (Carpenter, 2011) examines decision making in terms of the "dominant coalition" in organisations (Thompson, 1967), which they originally called upper echelons, and which laid the foundation of the TMT research stream. In essence, Hambrick and Mason (1984) suggested that an organisation's performance was linked to the values and cognitive bases of executives in an organisation. More recent advances in the TMT, or upper echelon, according to Hambrick (2007), assert that executives' personalities, experiences and values have a significant influence on their interpretation of strategic situations, which affects their strategic choices.

Also TMT research was criticised for their use of demographic variables, which were seen as overly simplistic (Matkoczy, 1997; Priem, Lyon & Dees, 1999). According to Hambrick and Mason (1984), the use of the so-called "black box", as a proxy for the cognitive variables, presented additional challenges in studying the mental representations and psychological features of executives. The term "black box", as Winner suggests for convenience, is described solely in terms of its inputs and outputs, and refers to a device or system. TMT research has not engaged sufficiently in the detailed activities undertaken by top management, while some studies in the TMT literature have over- emphasised organisational processes. In questioning why the use of these proxy input variables was insufficient, Markocsy (1997) notes that relying on convenient substitute variables is problematic as they may turn out not to be particularly good substitutes. Priem et al. (1999), building on the work of Markoczy (1997), argue in similar fashion that when proxy variables are employed without the intervening constructs of TMT processes, attitudes and judgments, then incomplete conclusions are likely. And guided by dissatisfaction with the current theory, Hambrick (2007), in the recent review of the field, notes that it is essential to open the "black box" to improve the insights provided by the research community.

As mentioned earlier, most of the TMT stream of research helped shift attention to the impact that individuals have on strategy, and added knowledge of strategy from a formulation view. As

Hutzschenreuter and Kleidienst (2006) claim, most of the studies assess the effects of TMT features at a group level on strategy process and its outcomes. As a consequence, there has been little research that looks at how individual strategy practitioners develop the practices. For this reason, a gap in the literature is considered to exist.

TMT research is at a crossroads requiring researcher ingenuity and different methodologies to create knowledge, despite the corrective steps taken by TMT scholars to address criticisms. As Hambrick (2007) concludes when he updated the TMT approach in 2007, the volume of research adopting this perspective remains strong. More recently, Carpenter (2011), in support of this observation, maintains that interest in the upper echelons is still dominating strategy research and shows no sign of slowing down.

In sum, mainstream strategic management research is divided into two major branches and it is in one of these, the branch strategy process research, which is interested in how strategies form, that strategy practitioners' role and participation become of considerable interest. Noticeably, two related research streams, managerial cognition and TMTs, focus on the role and participation of individuals in the strategy process. The majority of this research, however, treats strategy practitioners either as a type, or what the SAP literature refers to as an aggregated actor such as CEOs, CSOs, TMTs and Executives (Jarzabkowski & Spee, 2009). More importantly, the identification of strategy practitioners, as the name implies, is predominantly connected with the job title.

There still remains a gap in the field's understanding of how strategy practitioners perform strategy, despite the focus on strategy process, and with a greater focus on strategy practitioners (McEwan, 2016). As Chia and MacKay (2007) argue, the active role of the individual in strategy making remains limited, even though strategy process research has helped to humanise the strategy field. Hence, within mainstream research it remains an area that is identified as one where additional research is required (Walsh, 1995; Gavetti, Levinthal & Rivkin, 2005; Gary & Wood, 2011; Narayanan et al. 2011).

4.3.2. Practitioners in the SAP perspective

The failure to include strategy practitioners as human actors gave rise to SAP research which grew out of a dissatisfaction with traditional strategy research. The following review of extant SAP literature with a focus on strategy practitioners is an attempt to bridge the gap noted in the preceding section. The SAP perspective has grown in response to the absence of actions of living human actors in most academic publications. An intimate understanding of the practice that identifies a practitioner

as a competent strategist is required to facilitate this view (Jarzabkowski & Whittington, 2008). This may be an ambitious undertaking given the perceived difficulty in assessing competence, but it is an important endeavour nevertheless. The SAP definition of who is a strategy practitioner, in contrast to the managerialist approach in conventional strategy research, is much wider and includes consultants, middle managers and the workforce as well as external practitioners such as policy- makers, the media, gurus and business schools (Jarzabkowski & Whittington, 2008b; Vaara & Whittington, 2012). More importantly, according to Vaara and Whittington (2012), in general, strategy practitioners are viewed as social beings entwined within a social context within the SAP perspective.

Despite the fact that it is still a newly formed sub-field in the domain of strategic management (Jarzbkowski et al.2007; Golsorkji et al, 2015), the SAP perspective has been the subject of a number of reviews, as identified by SAP scholars such as Jarzabkowski et al.,(2007);Vaara and Whittington (2012); Rouleau (2013). Also a number of trends relating to the changing nature of this recent field have been identified. The academic contributions focus on discussing and defining the perspective and research agenda, and on reviewing the current state of the perspective. This may be in part owing to criticisms as mentioned earlier, as SAP tried to establish itself firmly as a viable stream within the strategic management community. It is important to highlight that in the popular management domain there is an extensive range of biographical and autobiographical accounts that provide glowing accounts of strategy practice and wisdom even though SAP is relatively new within the academia (McEwan, 2016).

That strategy research has been influenced by wider concerns to humanise management and organisation research by bringing the practitioner back into the picture has been confirmed by Jarzabkowski and Spee (2009), who refer to the seminal work of Weick (1997) and Whittington (2003). As already stressed, there appears to be little interest in traditional strategy research, according to Jarzabkowski and Spee (2009), for those living beings whose actions, emotions and motivations mould strategy, and, by focusing on humanising strategy research, SAP has taken this concern seriously. These authors base their review of the body of research in the SAP sub-field by confirming the definition of praxis as considered by Sztompka (1991) and Reckwitz (2002). According to Davis (2013), this definition is helpful in bridging both the macro and micro in SAP research. Davis (2013) confirms the view that praxis is an embedded concept that may be operationalised at different levels from the institutional to the micro-level. Furthermore, the author argues that it is dynamic and hence shifts fluidly through the interactions between levels. On the basis of his findings, Sztompka (1991) concludes that praxis is found where more than two levels meet, a dialectical synthesis of what is going on in society and what people are doing. Praxis therefore may occur at more than one level.

Building on this definition, Jarzabkowski and Spee (2009) distinguish three levels within the existing SAP literature, micro, meso and macro. Earlier, Johnson et al., (2007: 16-18) used a diagram to indicate where practice research fits into the strategic management field. Although limited in number, the studies in this review which focus on the strategy practitioner as an individual actor also provide a range of insightful information on strategy practitioners' worlds and practices (McEwan, 2016). Examples of such studies include researchers such as Samra-Fredericks (2003) who covers conversation and ethnographic analysis; Rouleau (2005) via a single case design use; and Beech and Johnson (2005) who speak of the ways in which strategy practitioners are brought to life through narrative which gives them primacy and voice. These authors allow their readers to enter the world of strategy practitioners through their conversation and not only via the data. McEwan (2016) further makes a case that this approach is similar to the upper echelons' view where executives are grouped by demographic variables which gives little insight into them as individuals.

Vaara and Whittington (2012) specify and review a sub-stream centred on the identity and the role of strategy practitioners within SAP research. Their research identifies a range of different strategy practitioners and highlights several exemplary studies which focus on consultants and middle managers. Taking this as a starting point, it is clear that in strategic planning top-down strategy makers are not, as the dominant strategic management paradigm would state, the only strategists. Other practitioners require political, training, coaching and negotiation skills to act in the position (Paroutis & Pettigrew, 2007; Angwin, Paroutis & Mitson, 2009; Whittington, Cailluet & Yakis-Douglas, 2011). These findings resonate with the findings of Breene et al. (2007) who show that strategy practitioners consider themselves primary doers with the desire, mandate and credentials to do rather than simply give advice. In the same vein, the middle management perspective affords some focus on those implementing strategy (Mantere, 2005, 2008; Rouleau & Balogun, 2011) pointing out their importance in sense-giving (Rouleau, 2005). To understand the thinking of strategy practitioners, other studies were able to employ relatively unique methods. Heracleous and Jacobs (2008), for example, use embodied metaphors to access strategy practitioners' conceptions of organisational levels. In particular, when they present the CEO as a "headless chicken" or the "king of the castle", these images provoke insights into the relationships and dynamics within the organisation.

Equally, as identified by Knights and Morgan (1991) and Barry and Elmes (1997), employing discursive and narrative methodologies and methods appears to be an area of interest for SAP researchers. The work of Laine and Vaara (2007) is a recent example of research that employs a discursive struggle perspective and identifies how actors use a certain strategy discourse to take control, maintain room for manoeuvre, or keep their organisational identity. Similarly, Beech and

Johnson (2005) use narrative analysis as a way to evaluate the micro-level dynamics of identity during strategic change and find that individuals' identities were affected during the process of strategic change.

The majority of SAP review studies rooted in strategy practitioners focus on the activities and results of practitioners. This is no surprise, given SAP's focus on practice. However, no studies were identified within the SAP extant literature which have a focus specifically on the role and participation of the differentiated workforce as strategy practitioners in an organisation. The current research seeks to investigate one group of actors and the way they do strategy through exploring their strategy implementation practices. Also, this research will be humanised as it will be embedded in the mundane realities of strategy implementation with a focus on actors, not the organisation, and on the situatedness of these actors instead of on abstract processes (Whittington, 2003a, 2003b; Jarzabkowski, 2001; Jarzabkowski & Spee, 2009).

From a practice theory perspective, an important argument needs to be introduced. According to Chia and MacKay (2007), the question is about whether strategy practices reside in the individual practitioner or are 'trans-individual'. Barnes (2001) provides a good analogy of advancing practice as a collective action with riding information. He suggests that practice as a collective action occurs because, as the foregrounding discussion suggests, people are orientated to each other in a way that produces the overall practice. In this way, it can be argued that a practice refers to a collective of shared possession (Barnes, 2001) or what Schatzki (2001) refers to as shared practical understanding.

The result of the review of literature in the strategic management discipline demonstrates that research has remained surprisingly silent on the role of strategy practitioners, in particular the differentiated workforce, in shaping and influencing strategy-making and strategy implementation in their daily mundane activities and practices in strategy implementation. Within orthodox strategic management research, the human practitioner is either absent or reduced to a set of demographic variables (Jarzabkowski & Spee, 2009). Similarly, there has been little empirical research on the role of the differentiated workforce as practitioners.

4.3.3. Participation in strategy work

As discussed earlier in section 2.2.1, most of the research on classical strategy literature has drawn on the managerialist foundation while strategy formulation is envisioned as the task of top management. During the 90s, a substantial amount of research in the field of strategic management

focused on finding effective ways of formulating strategies, particularly in the planning and positioning streams (Whittington, 1993; Mintzberg et al., 1998).

The advent of SAP has foregrounded the linkages between social processes in which strategies are realised. Drawing on the social science view, scholars such as Burgelman (1983), and Mintzberg and Waters (1985) have argued that bottom-up and emergent strategies are equally important. On the basis of these views, therefore, this study holds that participation of the differentiated workforce enables social processes in which strategies are actually realised.

In this section an attempt will be made to examine participation in SAP research. According to Laine and Vaara (2015), because participation helps to create commitment to strategies, it is a key issue in strategy process research. Floyd and Wooldridge (2000) suggest that its absence may have a negative impact on the quality of decision making. Within the emergent stream of research, scholars like Burgelman (1983), and Mintzberg and Waters (1985), point out that participation may take other forms that are important in process scholarship. As participation focuses on the activities of multiple actors and the practices they draw upon in strategy work, participation is equally important within SAP research (Mantere, 2008).

Despite this perceived importance, participation in strategy research has received relatively little attention (Laine & Vaara, 2015). An attempt will be made to cover studies that have touched upon participation in particular. Different streams of research within SAP research offer fundamentally different conceptions of strategy processes, strategic decision making and strategic practices, and therefore of participation as an organisational and a social phenomenon. Laine and Vaara (2015) spell out four approaches on participation: participation as part of strategy process dynamics; participation as produced in and through organisational practices; participation as a non-issue; and participation as an issue of subjectivity. As was indicated earlier, within traditional strategy research, as advocated by Ansoff (1965), Chandler (1962) and Hambrick and Mason (1984), strategy has mostly been understood as decision making accomplished by TMT. Within this paradigm, participation by others is a non-issue as their role is solely implementation. As previously noted, within the strategy process perspective, strategy is categorised as both intended and emergent (Burgelman, 1983; Mintzberg & Waters, 1985). This view provides us with an understanding of others, notably middle managers and mid-level professionals (Floyd & Lane, 1990; Floyd & Wooldridge, 1992) as actors in strategy-making. Within this perspective, participation can be seen as a key part of strategy dynamics. SAP research further builds on this process view by extending the understanding of strategy, conceptualising it as a praxis that includes various actors. Although SAP research has studied micro-level activities and patterns related to participation and social practices that enable or impede it

(Jarzabkowski, 2008; Mantere 2005, 2008), SAP has followed the conventional view of TMT perspective. The view that looks at participation as subjectivity is a critical post-structuralist perspective and its full potential is still to be realised (Laine & Vaara, 2015).

The current study responds to calls for more research on participation by extending strategic agency to non-management actors within a multifaceted strategy processes within a South African insurance business environment.

4.3.3.1. Participation as part of strategic processes

The traditional view on strategic decision making was challenged when scholars started to pay attention to the social aspects of strategy processes (Pettigrew 1973, 1992; Mintzberg, 1978). The classical works on strategy process by Bower in 1970, Burgelman in 1983, and Mintzberg and Waters in 1985, highlighted the roles of others as strategic actors. Bower's work in the early 70s indicates that planning in large, diversified organisations takes place on many levels of the organisation: corporate, divisional, business unit, and departmental. He argues that, in this way, middle managers and others play an important role, as they are able to assess if an issue is appropriate in its context. In the same vain, Mintzberg and his associates (1978, 1985) evaluate strategy as a pattern of actions and decisions in the organisation and emphasise the role of middle management and other actors. Continuing with this view, Burgelman (1983, 1991, 1994) demonstrates the entrepreneurial potential of middle management who introduce their own initiatives for strategic change. He further shows that highly skilled employees e.g., engineers, begin successful projects when they provide the technical and commercial skills needed by top management. More importantly, in the context of an emergent process, top management's role is mainly to provide support innovation.

These early strategy studies led to a stream of research on middle management and mid-level professionals, focusing on their roles as strategic actors (Floyd & Lane, 1990). This early work of the 90s sparked interest in the middle-management perspective. Floyd and Wooldridge (1992, 1996, 2000) classify the actions of middle management and mid-level professionals into roles associated with both top-down and bottom-up strategising, and with either the integration of ideas or their diversification. In an early study, Wooldridge and Floyd (1990) confirm that decision making by middle management leads to superior strategy formulation, which could be seen as the successful integration of diverse ideas. Floyd and Wooldridge's (1997) subsequent research concludes that successful performance requires the majority of middle managers to play integrative roles, and some of them to perform divergent strategic roles. A study by Ketokivi and Castaner (2004) substantiates that participation by middle management in strategy planning and the subsequent communication of

its results reduce position bias and the likelihood that the workforce would engage in sub-goal pursuits and cause an integration problem. Continuing this line of reasoning, Andersen (2004) argues that the autonomy of middle management to take initiatives in the face of environmental changes is linked to positive economic performance. He also claims that distributed decision-making authority seems to be more efficient when an organisation has a formal strategic planning process that integrates strategic actions. Although the evidence often seems contradictory, Laine and Vaara (2015) agree that the participation of middle management in strategic decision-making does not seem conducive to positive performance.

4.3.3.2. Participation as part of strategic practices

The distinction between process and practice views is, to some extent, arbitrary (Floyd, Cornelissen, Wright & Delios, 2011; Vaara & Whittington, 2012). The emergence of SAP scholarship has opened up our understanding of participation, in particular through the focus on micro-level activities. According to Laine and Vaara (2015), some of the studies have also drawn from a more practice-theoretical understanding of how specific practices enable or impede participation.

Recent studies have investigated how TMT involves middle management in strategy making (Jarzabkowski, 2008; Jarzabkowski & Balogun, 2009; Paroutis & Pettigrew, 2007; Villa & Canales, 2008). Jarzabkowski (2008) provides richly detailed research on how TMT utilises interactive actions such as discussions and meetings between management and other actors, and procedural actions such as planning, control, and monitoring to change strategy. In this study, the author shows that change in strongly institutionalised strategy needs a simultaneous pattern of interactive and procedural strategising, while on the other hand, a sequential pattern of interactive and procedural strategising is sufficient to change a weekly institutionalised strategy. Overall, the author found that constant discussions among levels and parts of an organisation combined with structural changes supportive of new strategies facilitate strategic change. Consistent with a more pervasive influence by middle managers as actors, Jarzabkowski and Balogun (2009) elucidate how a centralised strategy process guides the actions of middle management to alter the strategy process so that consensus is constructed and goals integrated. In sum, their findings confirm the view that integration arises only from active negotiations and compromises between actors.

Paroutis and Pettigrew (2007) and Villa and Canales (2008) later depict middle management participation in terms of how strategy process develops their strategic proactiveness and capability. Paroutis and Pettigrew (2007) show the development of the actions and practices of division-level strategy teams in the course of a corporate strategy process, which led them to increase their proactiveness and reduce the impact of TMT's dictates.

The following section looks at strategic agency from a strategy literature view.

4.4. STRATEGIC AGENCY

The importance of agency has steadily grown since strategy process literature was established in the seventies (see Pettigrew, 1992). A key insight from this research is that the organisation is not a monolith but comprises many agents actively involved in social interaction. Rather than focusing on TMT research, many results showing that middle managers can be the drivers of organisational strategy have been published. Indeed, as Mantere (2008) asserts, the observation that the realisation of organisational strategies is often fuelled by the agency of non-middle managers has given rise to a literature focusing on the impact of non-managerial and professional agency on organisational strategy process (e.g., Floyd & Lane, 2000; Floyd & Wooldridge, 1992, 2000; Wooldridge & Floyd, 1990). The workforce, in particular, the agency of the differentiated workforce, is a basis for strategic renewal. This is a bottom-up process where strategy is adapted to a changing business environment (Floyd & Wooldridge, 2000). More importantly, Guth and MacMillan (1986) and Kim and Mauborgne (1991, 1998), raise the possibility that agency is also key in the process of implementing deliberate strategy, where non-motivated people, for instance, sabotage implementation attempts.

As action is exhibited by an individual's agency, as suggested earlier, it is often linked with micro-sociological orientation. On the other hand, in line with structuration theory, structures are exhibited by social systems and are therefore the concern of a more macro orientation (Giddens, 2001). This research contributes to an emerging literature in micro-strategy which aims at shedding light into the micro activities of strategy and practices leading and shaping those activities (Jarzabkowski, 2004, 2005; Jarzabkowski et al. 2007; Johnson et al., 2003; Whittington, 2003, 2006), and where the differentiated workforce is an important group of strategy practitioners. Tripartite relations, according to Jarzabkowski's (2005) model of micro activities of strategy, exist between TMT, an organisational community, and strategy. As identified by Floyd and Wooldridge (2000), the differentiated workforce can be regarded as key members of the organisational community as they serve as a link between the organisation and customers. For the purpose of this research, practitioners include strategic key employees in strategic positions. These people's line of sight (LOS) and the organisation's business strategy are close. LOS is seen as an employee's understanding of the organisation's goals and what actions are necessary to contribute to those objectives (Boswell, 2006). This broadens the focus of prior research by extending strategic agency beyond middle-manager ranks (Jarzabkowski et al. 2013; Mantere, 2008; Mantere & Vaara, 2008). Looking at the level of praxis, Jarzabkowski and Spee (2009) note that previous SAP research was conducted mainly at the meso level. Based on individual strategy practitioners, this research aims to contribute to the under-researched area of activities at the

micro level (Rouleau, 2005; Samra-Fredricks, 2003). It also provides a basis from which to scrutinise individuals across an organisation's hierarchical levels (Langley, 1989). In addition, it also reveals the notion of power, which is implicit in any strategy-making activity (Narayanan & Fahey, 1982).

Overall, this research is placed at the intersection of extant work and the literature on micro strategy and strategic roles. By so doing, this research fuses "micro-organisational" and "macro-organisational" conversations, thereby bridging the divide that dominates strategic management literature. Arguably therefore, the present research augments emerging micro strategising literature by addressing constraints on agency by managers on the differentiated workforce.

4.4.1. Roles and agency

According to Floyd & Lane (2000), research postulates that strategic roles occur throughout an organisation. An attempt will be made in the literature review to uncover what is known and also to identify the gaps in the literature in the differentiation of strategic activities that are categorised as roles.

Research in the 80s viewed strategic roles from top-management perspectives, as indicated earlier in the review of the dominant strategy paradigm. However, by the late 80s, scholars such as Nonaka (1988) suggested that strategic roles can occur at the lower levels of the workforce. Many researchers (e.g., Burgelman, 1994, 1996; Floyd & Wooldridge, 1992, 1996, 1997, 2000; Wooldridge & Floyd, 1990) argued that middle-management roles, more specifically, were important drivers of organisational change. Due to their positioning and because the middle level managers experience greater levels of complexity and interactions, they are the hub through which strategic information flows (Burgelman, 1994; Floyd & Wooldridge, 1992, Nonaka, 1991). According to Floyd and Lane (2000), this strategic framework emphasises the distinct position of middle managers in the strategic renewal process, as they can appraise the worth of new information flowing up from the operational levels (Floyd & Wooldridge, 1992; Kanter, 1983). As identified by Walsh (1995), they have intimate strategic knowledge and are also insightful with operational issues than TMT. More importantly, as organisations find themselves in a rapid and dynamic change due to the pressures of information technologies and market forces disruptions, the roles of the middle managers, and particularly the differentiated workforce, continue to evolve and hence resulting in less hierarchical and latter organisations (Caldwell, 2003) that have elevated the roles of the non-management professionals in strategic positions in the organisation (Huselid et al. 2005; Becker & Huselid, 2006; Becker et al. 2009; Huselid & Becker, 2011).

According to Floyd and Wooldridge (2000), this paradigm shift followed Mintzberg's redefining of strategy as a pattern in a stream of decisions (Mintzberg & Waters, 1985). Simply put, this means that strategic activities develop in many varied levels of the organisation and from multiple actions of organisational actors (Floyd & Wooldridge, 2000). Many scholars argue that organisational performance is heavily influenced by what occurs at the middle of the organisation (Bugelman, 2003; Currie & Procter, 2005; Dutton et al., 2001; Floyd & Wooldridge, 1992, 1994, 1997, 2000; Huy, 2001, 2002; Nonaka, 1988,1994; Wooldridge & Floyd, 1990). Bower (1970) found evidence in a field investigation in a large diversified firm, to support a view that middle managers are in a key position to judge if strategic issues are being considered in the proper context. Apart from giving information inputs and implementing TMT's deliberate strategy, middle managers have traditionally not been regarded as part of the strategy process (Floyd & Wooldridge, 1992). Typically, strategic research remained at the macro-level of organisational and market environments focusing on causality related variable due to the dominance of Porter's (1980) seminal work.

However, there is a growing understanding that middle managers influence strategy and champion alternatives (Bugelman, 1983; Mintzberg and Waters, 1985), as part of a broader concern and growing interest in human agency in the construction and enactment of strategy in strategy research (Johnson et al., 2003; Schatzki et al., 2001). Schilit's (1987) research found that middle managers were likely to successful in influencing their superiors on strategic decisions, and that this was more pronounced during strategy implementation. Wooldridge and Floyd (1990) in a similar study, with middle managers in 20 organisations indicate a positive relationship between middle managers strategizing and organisational performance.

In the knowledge scholarship, for instance, the link between knowledge and strategic renewal and the knowledge development on middle managers is highlighted (Nonaka, 1994). That the contributions of middle managers are critical success factors to organisational change, this is crucial in elevating the notion. Nonaka (1994), holds that middle managers are the strategic hub of change because they combine strategic, macro, universal information and hands-on, micro, specific information. In particular, they work as a bridge between the TMT's visionary ideals and the mundane daily reality of the frontline of business. Knowledge is also an important critical link between strategic renewal and sensemaking (Nonaka et al., 200; Volberda et al., 2001).

Despite empirical evidence that middle managers can play a major role in initiating strategic change (Burgelman, 1983; Currie & Procter, 2005; Floyd & Lane, 2000; Floyd & Wooldridge, 2000; Huy, 2001; Nonaka, 1988; Westly, 1990), the literature has underplayed the role of middle managers in strategic terms until a decade ago (Mantere, 2008; Pappas & Wooldridge, 2007, Rouleau & Balogun,

2011). Shrivistava (1986) argues that at best they have been seen as supportive, despite acknowledging their positive contribution to strategic change. Floyd and Wooldridge (1996), on one hand, recognised that middle managers facilitate the organisational learning crucial during strategic change. Huy (2002) concluded that during change, it is the middle managers who have to deliver change into an organisation highlights that yet at the same time, they have to ensure that the continuity of business as usual throughout the period of change.

Given middle managers position below the TMT and above first-line supervisors in strategy making and formulation (Wooldridge et al., 2008) and being located to drive new thinking and quality of implementation, or even resist implementation (Floyd & Wooldridge, 1997), they are both agents of change and recipients of change (Balogun & Johnson, 2004). Raes et al., (2011) interface model suggests that individual in the TMT and middle managers rely on each other's relational and evaluating roles and related behaviours for successful strategic formulation and implementation. They advocate that middle managers are valued for their information as a basis for strategy formulation because they have the knowledge of who to talk to and how (Floyd & Wookdridge, 1997). Westly (1990) concluded that through understanding the dynamics of strategic conversation as being rooted in organisational realities, strategic conversations enact and create strategy as an interpretive system. According to Shaw (2002), organising is a conversational process and organisational change is shifts in the flow of conversations. In other words, by interpreting and redefining TMT's framing rules, that is, sensemaking, middle managers therefore redefine organisational ideologies and strategy (Weick, 1995).Westly's (1990) findings were that the drive for strategic actions by middle managers is found in strategic conversations. Rouleau (2005) and Hoon (2007) concur.

Overall, the middle level approach has been corroborated as being key to the making of resultant strategic initiatives. This is due to their unique positioning and their strategic roles (Floyd & Wooldridge, 1992, 2000). An important role is through their divergent behaviour when championing alternatives and facilitating adaptability (Floyd &Wooldridge, 1992; Pappas & Wooldridge, 2007). Importantly, the TMT and middle management levels rely on each other's relational roles and related behaviours for successful strategy development and implementation (Raes et al., 2011

4.4.2. The Floyd and Wooldridge Model of Strategic Roles

According to Floyd and Wooldridge (1992), strategic roles form a network of interactions that can culminate in a series of strategic decisions. Kotter (1996) goes on to state that recognising small victories on the road to strategic renewal aids the workforce to gain momentum in enacting large-scale changes. Generally the literature postulates that strategy neither begins at the top nor ends at the

bottom but is a dynamic process of integrating actions (Burgelman, 1994, 2002; Floyd & Lane, 2002; Mintzberg, 1987; Mintzberg et al., 1998; Wooldridge & Floyd, 1990). This study extends the work of Floyd and Wooldridge (1992) using their model of strategic roles. Drawing on this work, the study extends middle management strategic roles to the differentiated workforce strategic roles and priorities in the strategic planning process and assesses the effect that this has on organisational performance. Despite references in the literature to wider participation in the strategic processes, there is little empirical evidence regarding the effects of broader involvement on organisational performance.

The term “middle management" in the literature review is understood rather broadly (Wooldridge, Schmid & Floyd, 2008). As identified by Dutton and Ashford (1993) and Uyterhoven (1972), in terms of organisational hierarchy, the middle-management perspective is situated above first-level supervision and extends to managers located below top management. Wooldridge et al. (2008) point out that access to TMT and their knowledge of business operations are the distinct features of middle management. More simply, this combination enables them to function as mediators between the organisation’s strategy and day-to-day operational activities (Nonaka, 1994). In most organisations such functional designation includes different types of mid-level professionals, general line managers, functional line managers and team-based executives.

Pettigrew, Thomas and Whittington (2006) assert that the field of strategic management has developed in a specific way and this has resulted in notable strengths and weaknesses, preoccupations and blind spots. In addition, Pettigrew et al. (2006) highlight this complexity by showing how other scholars in the fields of management, social sciences and humanities have engaged in questions about the direction, organisation and performance of institutions, most notably in the social sciences fields such as philosophy, political science, sociology, psychology and economics. In order to understand the field of management and strategy, this research takes the view that intellectual development of all these fields of management is dependent on a reciprocal and open association with the social sciences and humanities.

As the literature suggests, strategic leadership occurs at all levels. Despite this, the tendency has been to describe middle management as very close to TMT. This definition has resulted in describing the term hierarchically, that is, in terms of where they sit in the organisation chart. In earlier studies, Wooldridge and Floyd (1990) investigate the involvement of middle level managers in twenty organisations concluding that many of the findings could also apply to non-management. An equally important study by Litterer, Miyamoto and Voyer (1985) investigates product engineers. They found

that the engineers' decisions were significant in defining market success and innovation. The service sectors constitute the largest economic activities, almost 80% of all jobs in post-industrial societies (Heizer & Render, 2014). Wooldridge & Floyd (1990) postulate that in professional service organisations, the influence of non-managerial professionals, that is, the differentiated workforce, on strategy is even greater.

Floyd & Wooldridge (1992) created a dynamic model of strategic roles based on the work of a number of theorists which posits the ten strategic roles of management differentiated across three levels of management - top management, middle management and first-line supervisor. Floyd & Wooldridge (1992) claim that the process is dynamic, that is, the roles overlap at all levels rather than having discrete boundaries between them. Furthermore, the integration of role is an important management function (Mintzberg, 1973; Yuk, 2002). In an early study, Merton (1957) points out that members in closest structural proximity would tend to share more role-set behaviours. By nature of their proximity to top management, for instance, middle management roles and first-line management are shared at both levels.

Floyd and Wooldridge's (1992) fourfold categorisation is adopted for the role expectations that management places on the differentiated workforce regarding their activities in the strategy making process. The model is based on the following two dichotomies namely: upward vs. downward activity, and integrative vs. divergent activity. The four roles that form the activity types are 1) implementing deliberate strategy (downward, integrative), 2) facilitating adaptability (downward, divergent), 3) synthesising information (upward, integrative) and 4) championing alternatives (upward, divergent). Extending this generic and widely accepted classification of how the differentiated workforce may be involved in strategy work, the model can be regarded to envelop most of the expectations the differentiated workforce are likely to meet from the managers. The management strategic roles are presented in table 4.2.

Table 4.2: The four management strategic roles in strategy

Role Expectations	Strategic Actions
Championing Alternatives	Middle managers present and provide persuasive business solutions and options to senior management. The presented Ideas are varied to influence TMT decision.
Synthesising Information	Interpretation and evaluation of information is interpreted and assessed with impact on TMT and the whole organisation. From the cognitive perspective, the direction of the influence is upward and integrative.
Facilitating Adaptability	There are flexible organisational arrangements, even aside from the planned deliberate strategy. From the cognitive perspective the influence and the promoted ideas are divergent. There is a downward influence towards lower levels of the organisation.
Implementing Deliberate Strategy	There is an alignment between organisational action and the strategic goals of senior management, initiated by the middle managers. There is a downward and integrative influence from the cognitive perspective.

Source: Adapted from Floyd and Wooldridge (1992).

Implementing deliberate strategy: By its nature this role expectation is top-down. It involves taking actions within the role and disseminating strategy horizontally with colleagues and downward to employees. The narration of achievement may build a sense of confidence, trust and respect among the professionals. As it has been argued, Floyd & Wooldridge's typology can be regarded as including the expectations of management towards the differentiated workforce and many of the roles described by other researchers overlap with this model. According to Floyd & Wooldridge (1992), lower-level middle management has an influence on the strategy process and a positive relationship exists between the differentiated workforce involvement and the organisation performance (Mantere & Vaara, 2008).

Synthesising information: The second role is synthesising information and refers to the interpretation and evaluation of information. This activity involves both the ascending and the integrative formation of strategy. Some work has been done elaborating and examining mid-level managers' issue selling consistent with this framework, and, especially, the championing and synthesising roles (Dutton & Ashford, 1993; Dutton, Ashford, O'Neil & Lawrence, 2001; Ling, Floyd & Baldridge, 2005). Middle managers help shape the strategic agenda by influencing which issues come to the attention of top management through issue selling (Wooldridge et al., 2008).

Synthesising information is concerned with the way in which the differentiated workforce gathers and makes sense of information in line with organisational strategy. It is then up to the differentiated workforce competency to filter important information and to share it with management. The

information shared then becomes the basis for strategic decision making. This ongoing communication feedback ensures that the formulated organisation strategic plans are shared and embedded in the workforce's previous experience, thus throughout the entire organisation. The critical link here bridges a major element that the differentiated workforce may be able to build on past experiences to know whether their endeavours are successful or not.

Facilitating adaptability: According to Floyd & Wooldridge (1992), the role of facilitating adaptability nourishes flexibility and learning, guides change, and shares information. Building on these theoretical arguments. Denison, Hooijberg & Quinn (1995), show how the facilitator encourages the expression of opinions, seeks consensus, and negotiates compromise. The mentor, on the other hand, is aware of individual needs, listens actively, is fair, supports legitimate requests, and attempts to facilitate the development of individuals.

In this role, the differentiated workforce can exert a descending and divergent influence through facilitating adaptability, where they support different activities within their functional areas of expertise that lie outside management's official expectations (Currie & Procter, 2005). According to Davis (2013), facilitating adaptability could be seen as fostering flexible organisational arrangements. It integrates the ways in which the differentiated workforce are expected to promote autonomous development within their areas of responsibility. This expectation will enable the differentiated workforce in strategic agency, and in this way, legitimise efforts to develop work practice.

Champion alternatives: Within the middle-management role, championing, as identified by Floyd & Wooldridge (1992), is described as presenting alternatives, nurturing and advocating change. Building on this work, working with Intel Corporation, Burgelman (1983b) shows how mid-level managers try to formulate strategies for areas of a business activity, and attempt to influence top management to support them. In the same way, the differentiated workforce has the potential to influence the strategic thinking of management by selling to them strategic initiatives that differ from current idea of strategy. A central feature underlying this concept is that it centres on influencing corporate management to adjust their concept of strategy. Floyd & Wooldridge (1992) consider championing alternatives as the persistent and persuasive communication of strategic options to management.

This research tries to gain insights into the conditions under which role expectations enable the strategic agency of the differentiated workforce. Within this context, strategic agency is considered as an individual's capacity to have a perceived effect upon own work on an issue they regard as beneficial to the interests of their organisation. This definition is derived from Giddens's (1984)

notion of knowledgeability, and also on a view of strategy as an interpretive construct, with the purpose to motivate and incite members for the organisation's gain (Chaffee, 1985).

4.4.3. Limitations of the Floyd and Wooldridge Model

There are four concerns related to this model. Firstly, the model has not been empirically tested so the discriminant validity amongst the different roles may be difficult to ascertain. For example, different scholars like Burgelman (1996) and Mintzberg (1973), use different terminology to refer to similar roles. The roles represent a classification of patterns of activities. Also, the strategic roles are so integrated with each other that differentiation between some roles and levels may be hard to ascertain. Lastly, in today's behaviourally complex organisations (Dooley, 1997), emergent strategy (Mintzberg, 1987) relies increasingly on the workforce. Although this model focuses on TMT and middle management, the literature has argued the importance of the differentiated workforce's strategic role (Becker et al., 2009; Conaty & Charan, 2011).

4.5. MID-LEVEL LITERATURE REVIEW IN STRATEGY IMPLEMENTATION

In reviewing the literature on the middle management approach, the following themes were identified: middle-level activity and organisational outcome; strategic sensemaking; organisational cognition in strategy implementation; and strategy implementation practices of middle managers. These themes are discussed next.

4.5.1. Organisational cognition and middle management in strategy implementation

This theme is associated with one of the main challenges within SAP approach (see Jarzabkowski et al., 2007; Johnson et al., 2007), that is, to advance understanding of cognition in practice (Hodgkinson & Clarke, 2007). According to Markoczy (2001), research within organisational cognition is embedded in the acknowledgement the middle managers come with a functional and/or subunit perspective that may impact their views and turn their behaviour toward pursuit of goals that are narrow and not aligned to the broad organisational strategy. Davis (2013) holds that research in this area has sought to contribute to insights of how actors' cognition affect and is influenced by strategy processes. Other common topics within this research stream are strategic consensus and shared strategic thinking.

The work of Kellermanns, Walter, Lechner and Floyd (2005), based on the assumption that strategic consensus increases organisational performance by improving coordination and cooperation within

the organisation indicated that there is no agreement among researcher about the nature of the consensus construct and how to conceptualise the consensus-performance relationship. In addition, there is dearth of strategic consensus research that investigated the effects of consensus among a different group of managers. In particular, this study supports Wooldridge and Floyd (1989) view that middle-level actors are not likely to support strategy implementation unless they are commited and have buy-in to TMT's strategic plans. Furthermore, Wooldridge and Floyd (1989) argue that TMT consensus is pertinent in organisational contexts distinguished by a complete strategy process, whereas more incremental, emergent approaches are likely to need inclusive shared understanding with all stakeholders. In their later study that looked at the strategic involvement of middle-level managers in 20 organisations, Wooldridge and Floyd (1990) considered the extent to which their agreement with TMT's strategic priorities was enhanced via their participation in the strategic planning process and how this impacted performance. Although the study did not find consensus among middle managers to be linked to organisational performance, they did indicate the significance of the middle managers involvement as a base for increasing strategic consensus. They demonstrate that some involvement can be realised in contexts where it is encouraged to look at strategic decisions critically.

Similar findings are made by Westly (1990) who indicated that middle managers' exclusion from strategy related discussions led to demotivation to implement strategies and conflict. Westly (1990) found that two-way conversations between TMT and middle managers increased organisational responsiveness and innovation in strategy. In their study, Laine and Vaara (2007) used a discursive view to investigate shared understandings. Middle managers began their own discussions and resisted HQ attempts to define shared understandings and control the strategy creation. The authors advocate that the very act of talking about strategy involvement has serious implications regarding the role and identity practitioners had. In sum, non-participative perspective 'kills' energy and buy -in required in the implementation of strategies (Laine & Vaara, 2007). Davies (2013) points out that there are good reasons to try to search for ways to encourage participation even in situations where self-interest may seem undermined.

4.5.2. Middle-level activity and organisational outcome

A considerable amount of research findings and theories suggest that middle managers make significant contribution to strategy (Burgelman, 1983; Wooldridge & Floyd, 1990; Dutton & Ashford, 1993; Dutton et al., 2001; Boyett & Currie, 2004; Mair, 2005). Syles (1993) holds that middle managers play a role in integrating and aligning organisational competencies. In particular, the work of Floyd and Wooldridge (1992) demonstrated empirical research for these propositions and indicated

a relationship between types of middle managers activities and organisation's strategic otientation. Floyd and Lane (2000) advocate that strategic renewal originates from deeply rooted and socially complex processes within an organisation and that their actions mainly impact how strategic renewal evolves within an organisation.

Wooldridge and Floyd's (1990) study looking at the strategic involvement of mid-level managers in 20 organisations found that middle managers' involvement was linked to financial performance. Although this does not mean agreement with TMT's plans, however middle managers involvement in the formulation of strategic decisions was connected to better financial results. In a later study Floyd and Wooldridge (1994) suggest that implementation remains key and strategies that lack middle management commitment suffer serious implementation challenges. In their study on role enactment, Floyd and Wooldridge (1997) proved that the positive effects on organisational performance depend on whether the overall pattern of upward influence is conducive to shifts in the network centrality of each actor or if the pattern of downward influence is consistent with an appropriate balance between the organisations' need for control and flexibility.

A considerable amount of research findings hold that non-senior managers and employees have a better understanding of which strategies are realistic (Mintzberg, 1994). In the same vain, other scholars such as Hart (1992), Floyd and Lane (2000), Floyd and Wooldridge (2000) argue that the ideas of lower-level managers are pivotal to organisational knowledge development. Equally, these ideas assist organisational strategies to adapt to the changing and dynamic environments (Burgelman, 1983a; Bourgeeois & Brodwin, 1984; Lovas & Ghoshal, 2000). In addition, involvement enhances the implementation of strategic plans though increased commitment (Guth & MacMillan, 1986; Klein & Sorra, 1996), collective sensemaking (Gioia & Chittipeddi, 1991), and integration of subunit goal (Ketokivi & Castaner, 2004). Some studies investigated hoe middle managers' actions impacts the emergence of realised strategy (Floyd & Wooldridge, 1992), and others indicated how middle management lead processes of strategic change such as, Burgelman (1994), Balogun and Johnson (2004), and Balogun et al., (2005). More specifically, Burgelman (1994) found that middle managers' emergent behaviour often diverges from, and finally impacts, the retrospective redefinition of TMT's approved plan. Boyett and Currie show how middle managers arranged an emergent strategy that became the new strategic vision. Middle managers in different roles contribute to the achievement of radical change in organisations (Huy, 2001).

4.5.3. Strategic sensemaking

It is deemed important to discuss middle managers' strategic sensemaking, even though it is part of the synthesising information role. According to Davis (2013), the synthesising information role

includes elements of sensemaking, but it is mostly directed towards TMT. The basic notion of sensemaking is that reality is a continuous outcome emanating from efforts to develop a flow and make retrospective sense of what happens (Weick & Roberts, 1993). Therefore, it can be seen as a social process of shaping and remoulding of meaning through which managers create, interpret and understand sense for themselves and others of the changing organisational context and surroundings (Rouleau & Balogun, 2011). According to Samra-Fredericks (2003) strategic sensemaking refers to the process of constructing meaning whereby people interprete events and matters within and outside their organisation that are not clear to them to make that message meaningful within the context.
According to Balogun and Johnson (2004, 2005), sensemaking occur in formal, vertical processes that are uncontrolled. Particularly relevant to this study is the idea that middle managers are uniquely positioned to play a critical rolr in how change is passed onto the frontline workforce (Maitlis & Sonenshein, 2010). Building on the organisational interpretation literature and organisational learning theory, Beck and Plowman (2009) highlight how middle managers frame and enrich the interpretation of unusual events in oerganisations. While there are studies on the role of TMT's sensemaking during change (Gioia & Thomas, 1995; Mailtlis & Lawrence, 2007), of specific importance to this work are the studies that have focused on the roles of middle managers sensemaking, thus creating a schema for change in the absence of TMT (Balogun & Johnson, 2004). Research indicates that sensemaking is central to learning in environment where ambiguity is high irrespective of whether this is due to a crisis or the operational context (Maitlis & Christianson, 2014). A common finding in the research is that the relationship between sensemaking and innovation, learning or change is effected by organisational context (Jay, 2013). This theme shows the importance of sensemaking in developing new insights and new practices in organisations, ant it could be concluded that sensemaking is at the hub of strategic change processes.

4.5.4. Strategy implementation practices of middle managers

SAP scholars hold that strategy practitioners draw upon regular, socially defined modes of acting that make their interactions and activities meaningful to the organisation (Jarzabkowski et al., 2007; Chia & McKay, 2007; Whittington et al., 2006). According to Jarzabkowski and Seidl (2008), the discources, technologies, tools and social structures through which micro-actions are created need to be studied. Strategy is associated with specific kinds of practices namely, strategic planning, strategy workshops, budget cycles and annual reviews. However, often these are neglected as the mundane practices of strategy. Whittington (1996, 2003) argues that these overlooked internalised, routine and mundane practices are critical as they socially structure strategic outcomes.

Strategy making, as identified by Jarzabkowski (2005) and Johnson et al. (2007) is a dynamic process that involves multiple practitioners and is not a as discrete stages of formulation followed by implementation. More importantly, strategy is a specific type of action linked with particular practices as indicated above. For example, just as science may be seen as those actions that draw on scientific practices such as methods, scientific language and tools, similarly strategy may be defined as those activities that draw on particular strategic practices (Davies, 2013). This study used the SAP lens to identify and analyse the strategy implementation activities of the differentiated workforce, it was relevant to consider the situated activities located within the praxis of the practitioners. These would be the actual work of strategy implementation work such as all the meetings, presenting and communicating, consulting and writing and these constitute the real mundane strategy making and implementation.

The routinised types of behaviour are also made of a number of elements that are interlinked to each other. Routines consist of the following: forms of bodily activities, forms of mental activities, things and their uses, states of emotion and motivational knowledge, a background knowledge in the form of understanding (Reckwitz, 2002). All these need to be taken into consideration to understand strategy-making. In this study, the practices that the practitioners that is, the differentiated workforce, use to do strategy implementation work are the social, symbolic and material tools (Jarzabkowski & Whittington, 2008). To develop practice, these practices are connected, harmonised and accommodated. Practices comprise those practically and theoretically derived tools that form daily activity and business language of strategy. According to Jarzabkowski et al. (2007), these practices could include the following: Porter's five forces, decision modelling and budgets as well as material artefacts and technologies, for example PowerPoint slides, spreadsheets and flipcharts.

Importantly, in a dynamic and changing world of today, the challenge is to master the key practices, procedures and tools for continuous reorganising and restrategising to ensure perfection. They support the view that strategy should be seen as crafted through emergent processes with formal strategy analysis as an obstruction (Mintzberg, 1994). Managers in an almost intuitive way, mould the material with which they work. According to Clark (1997), strategy tools are seen as numerous techniques, models, frameworks, tools, methods and methodologies which are available to support decision-making within strategic management. Tools are artefacts around which organising, and action take place. That is, it is conceptualised as a boundary object that mediate the initiation and implementation of strategic plans across boundaries within organisations. Strategy tools, as identified by Spee and Jarzabkowski (2011), are not seen as strategy itself, but rather as part of the broader strategising work. In explaining this view, Jarzabkowski and Wilson (2006) hold that strategy tools assume the status of an artefact, framing information and giving the foundation for interaction around

a common tool that is known by actors in a strategy task. Though the strategic planning process may allocate strategic responsibility for the use of strategy tools to specific organisational functions and levels, this could unintentionally result in semantic boundaries to communicating strategy. (Whittington & Cailluet, 2008). Mantere and Vaara (2008) assert that for strategy tools to be efficient, it is key to secure involvement in their selection and use. The information encoded in a strategy tool, eg. SWOT or BCG matrix, is not meaningful in itself, but rather, the tools emanate meaning through the interactions in which they are utilised. From the literature reviewed, the following gaps relevant to this study are identified.

4.6. RESEARCH GAPS IN THE LITERATURE

There are several major research themes that are developing from the extant literature. More importantly, there are emerging calls for more empirical research in the literatures on strategic implementation (BAM, 2013; Caldido & Santos, 2015; Janse van Rensburg, 2016; Weiser et al., 2020), SAP (Davis, 2013; Jarzabkowski & Spee, 2009; Vaara & Whittington, 2012) and the differentiated workforce as strategic actors (Huselid & Becker, 2011; Huselid et al., 2005; Becker & Huselid, 2006). Within the SAP literature there are more calls for more research into identifying the strategists in terms of the agency and experience of individuals that play a role in strategy construction and implementation. Within this study, the differentiated workforce perspective considers the non-management key professionals in important jobs as pivotal to explaining major organisational outcome.

The argument that this thesis presents is that the professionals as mid-level actors are the make and break for an organisation's performance through their strategy making role in the strategic renewal process. Building on the middle management perspective, this study conceptualises the workforce as a major driver of organisational performance (Burgelman, 1983, Floyd & Wooldridge, 2000; Hart, 1992 Nonaka, 1988). Bower (1970) and Burgelman (1988) acknowledged that middle level actors, together with TMT initiated and championed strategic initiatives in organisations. Simply put, strategic action often develops deep within the organisation mainly from the activities of front-line and middle managers (Mintzberg et al., 1989). Despite the empirical evidence that these actors can play key role in initiating strategic change, this observation has been underplayed by scholars and at best reduced to being supportive. The mid-level actors play a critical role as both implementers and recipients of change during strategic change (Balogun & Johnson, 2004). For example, their involvement provides continuity and emotional support during change and shield the organisation against chaos (Huy, 2002) and non-involvement may lead to sabotage.

SAP approach is interested in developing insight of the skilled practitioner (Whittington, 2006) and the practices and activities within strategy creation and strategic change roles of the actors (Balogun & Johnson, 2004; Jarzabkowski, 2004). The ways in which practitioners develop and advance themselves as strategic actors has been neglected (Jarzabkowski & Spee, 2009). Similarly, little is known about improving our understanding of the strategic roles, practices, behaviours and attributes utilised when strategizing (Floyd & Wooldridge, 1992).

In analysing SAP, the strategists need to be identified in terms of the agency and experience of individuals that play a role on developing strategy. A practice view on who strategists are goes beyond truncated views of strategy as deliberate, top-down process, thus identifying a much wider group of actors as potential strategist (Jarzabkowski et al., 2007). Increasingly, SAP research show that middle managers and operational-level employees are vital strategic actors. It is important to identify these actors as strategists, opening a research agenda that goes beyond TMT to study other levels of employees as strategic actors. Though a broader definition of who a strategist is, it is possible to discern a wider range of practices (Jarzabkowski et al., 2007).

This study focuses on the differentiated workforce as practitioners. It will contribute to an emerging literature in micro-strategy that attempts to understand the micro-activities of strategy, especially the workforce's practices that drive and guide those actions. Part of the contribution of this work is to present a holistic overview of strategising activities of the actors by bringing together all the constructs from the SAP perspective such as sensemaking, micro-strategising, tacit knowledge and narratives. Within this study the differentiated workforce perspective considers the mid-level professionals as central to explaining major organisational outcomes.

Strategy process research provides systematic and rich descriptions indicating that strategy-making comprises a variety of actors and the contextual influences because micro-level and the actual actions, practices and practitioners involved in strategising have been overlooked (Whittington, 1996, 2002). According to Hendry (2000), current conceptualisations of strategising offer disconnected and partial views of the strategy process. From the conceptual approach, this treatise makes the following contributions to the body of knowledge on the practices of the differentiated workforce: First, this work presents an analysis of how the workforce puts strategy into practice in the insurance organisation in South Africa, unlike previous research that looked at TMT. Second, this study will show what the unique features of the insurance organisational business context are regarding the strategy making and implementation of the activities of the actors. Lastly, the micro-environmental factors that influence the strategy implementation activities of the workforce will be identified.

Vaara and Whittington (2012) claim that more research still needs to be conducted on strategy emergence, the role of materiality and critical interpretations of strategy. A need also exists to investigate the other organisational practices that are not recognised as strategic, but still have an important role in strategy-making (Chia & Rasche, 2010; Tsoukas, 2010). Studying the workforce's strategizing practices would contribute to insight into the organisational dynamics of strategy making and stress the diversity of these practices and the polyphony that they often produce in and around strategy making (Vaara & Whittington, 2012). Studying the workforce within the insurance context could inform the practices of the vital component of the financial sector and the national economy. It may shed light on contextual influences upon practice and on the way individual practitioners use practice and it may provide a basis for relating these particular micro-findings to other organisations.

Previous research has indicated that organisational performance is heavily influenced by what happens in the middle of the organisation, rather than at the top (Currie & Procter, 2005). This implies that actions in the organisations at the mid-level influences not only how the strategy is practiced, but also impacts on the performance of the organisation. Strategic management, as a management process, mainly involves many activities to ensure successful strategy making and execution. Nonaka (1988) made the observation that strategic leadership occurs at all levels of the organisation. A more substantive position for mid-level actors in the strategy process emerged in conjunction with flatter and more entrepreneurial model of organisation that competes in knowledge-intensive environment (Wooldridge et al., 2008). This new model and competitive business environment have contributed to changes in the roles and contributions of different stakeholders in the organisation.

Strategies often emerge in organisations and may be interpreted to mean something different from what was initially articulated. This emerging approach to strategy is often due to the activities at the mid-level within the organisation, and strategic initiatives may arise without the awareness of TMT. While deliberate strategies tend to stress TMT direction and hierarchy, the emergent ones open way for collective action and convergent behaviour (Davis, 2013).

Despite its relevance to organisations, little work has taken seriously the focus on how strategy is realised and thus, there are renewed calls for researchers to investigate the processes by which strategies become realised (Tsoukas, 2010; Vaara & Whittington, 2012). Taking seriously the notion of realised strategy has the following implications: First, it suggests that the micro-activities and practices that people engage in as part of their daily work are central to understanding strategy (Balogun et al., 2014; Johnson et al., 2003; Whittington, 2006), and thus invites research of the dynamic activities enacted by individuals (Balogun & Floyd, 2010; Le & Jarzabkowski, 2014). Secondly, it extends the definition of strategists beyond the TMT (Balogun & Johnson, 2004;

Jarzabkowski et al., 2007), thus introducing the role of others into the strategy process. Lastly, it suggests that realised strategy is critically affected by material issues of context (Dameron et al., 2015) and human interaction (Le & Jarzabkowski, 2014).

Despite a declared interest in the breadth of strategic practice, in challenging how and where it occurs, and in stressing the role of contextual and interactional features, research has continued to find strategic practice, practitioners and their practices in contexts that are easily classified as strategic. However, capturing the contributions of non-managerial workforce to strategy work and the creation of realised strategy is difficult to study as these actors are not in present in the events that are usually associated with strategic work. To access theoretical and empirical resources to research these employees and their contribution to achieving strategy, this study draws on SHRM research of Becker and Huselid and their associates which advocate human capital as the foundation of value creation particularly in the New Economy. Applied to strategy work, this provides an approach through which to uncover how, in the course of routine work, strategic activities take place at the operational level of the insurance organisations.

Further insight into these identified research gaps will be addressed by the research questions presented in Chapter 1. All these questions are inherently connected. The answers should contribute to understanding more about how the differentiated workforce contribute to emergent strategy and strategy implementation within the insurance business context in South Africa. Much of what separates organisational performance occurs in the middle of the organisation and not at the top. This warrants more research to address strategy making and execution in organisations. SAP as a new evolving field, there are many gaps that remain to be explored (Jarzabkowski & Spee, 2009). The field has been dominated by how strategy is constructed than strategy implementation (Jarzabkowski, 2005; Regner, 2003). This study is focused on adding to the literature where the domains of SAP, strategic management, strategy implementation and SHRM research interlink, and by contributing to some of the gaps they have in common, and consequently answering the call to achieve cumulative knowledge (Floyd et al., 2011). This study is a response to the need for further research into strategy implementation and used empirical work executed in different environments to determine the practices used in the implementation and process of strategy. Essentially, this work explains how strategy is implemented in relation to social practices (Vaara & Whittington, 2012; Jarzabkowski & Spee, 2009; Rouleau, 2013, Whittington, 2006).

4.7. INTEGRATION OF THE WORK

This research conceptualises strategy as something that emerges in the daily, mundane activities and work practices of all the members of the organisation (workforce) and thus shifts the focus of analysis onto the entire workforce of the organisation.

In this study the researcher problematises the idea of strategy implementation as essentially a “management activity" - a set of activities and practices through which strategy practitioners manage strategy (Johnson et al., 2007), one that tends to reserve strategic agency and the subjectivity of the strategist primarily for managers. According to Clegg et al. (2004), it may then be questioned whether the restriction of strategy making and strategy implementation to the confines of corporate elite will serve to foster creativity and innovation in the organisation.

Arguably, therefore, in redefining strategy and broadening the realm of agency in strategy implementation work, this research extends strategic agency to members of the organisation beyond TMT and middle managers. The main argument of this study is that executives do not formulate and implement strategies in isolation. West (2007) notes that empirical research supports the idea that when entrepreneurial teams with diverse backgrounds agree and unite on a course of strategic action for an organisational decision, quality improves. From an SAP perspective, the neglect of the human being (the workforce) in strategy implementation is an issue referred to by many SAP scholars. This more recent rise in interest in human agency in strategic management is mainly a response to a general dissatisfaction with the prescriptive models and frameworks that characterise the dominant strategic management paradigm.

More importantly, SAP, as a sub-field of strategic management, is concerned with the doing of strategy. As indicated previously, strategy has been defined as a situated, socially accomplished activity while strategising includes those interactions, negotiations and actions of diverse players and the situated practices that actors draw upon in doing strategy. Embedded in the doing of strategy is that strategy takes its meaning from the social, political and historical contexts in which it occurs (Henry, 2000). In fact, SAP does not reduce itself to a single stream of strategising activity, but identifies an organisation constituted by multiple coexisting strategies. These strategies occur at different organisational levels, which may not be equally compatible for all members (Jarzabkowski, 2005, 2008; Whittington et al., 2002). In a nutshell, strategy as social practice takes a pluralistic, holistic view on formulating, implementing and communicating strategies across organisational levels.

However, the study of other actors and, in particular, the differentiated workforce, in strategy making and strategy implementation, and the way that they interact with management in the doing of strategy,

remains relatively under explored as a research issue. The relative neglect of the role of the professionals in non-management positions in daily routines and practices of strategy implementation in strategy research is in part due to inconsistent and overly broad definitions and theoretical conceptualisations of strategy practices, in which practitioners, praxis and practices are interwoven in a complex bundle of practices (Carter et al., 2008; Jarzabkowski et al., 2009; Reckwitz, 2002).

Within conventional strategic management research, the lack of focus on individual practitioners inspired an increased interest in strategy practitioners and their practices. The emergence of SAP can be linked to the following trends in management research (Suddeably et al., 2013). Hernes (2009) claims that the first trend is the turn towards processual understandings of organisation and management, which is advocated by Weick (1979). To acknowledge social phenomena as accomplished through activities, Weick (1979) urges researchers to use verbs or gerunds instead of nouns. Hence, Johnson et al. (2003) point out that the SAP researcher should adopt an activity-based view by studying micro-activities, and stressing the doing of strategy. The practice turn in social science, as identified by Schatzki et al. (2001) is the second trend. Within the wider social context it emphasises observable activity that shapes and is shaped. SAP scholars posit that strategising activity is based on "regular, socially defined roles of acting that arise from the plural social institutions to which [actors] belong" (Jarzabkowski et al. 2007, p.6). It could be surmised that SAP is the foundation from which the importance of the activities of people in organisations is rooted. A broad range of methodological approaches has been used in SAP research, and by allowing strategy to be evaluated via a number of lenses, theoretical conceptualisation is enriched. Consequently, significant focus on how strategy practitioners develop their strategy implementation and practices within SAP research has yet to be explored.

With regard to the role of the workforce in strategy implementation, the research findings of Colleirs, Fishwick and Floyd (2004), although having different philosophical and theoretical orientations, suggests a positive relationship between strategic planning and the workforce, particularly in dynamic business environments, thus increasing understanding about strategy and as a result, enabling strategy implementation. Several scholars in continuing this line of reasoning support these findings. For example, Grundy and King (1992) and Liedtka (2000) conclude that personnel commitment to strategy implementation and organisational learning mediate the relationship between participative strategic planning and organisational performance. The work of Floyd and Wooldridge (1992), Mantra and Vaara (2008), and Beer, Voelpel, Leibold and Tekie support this view.

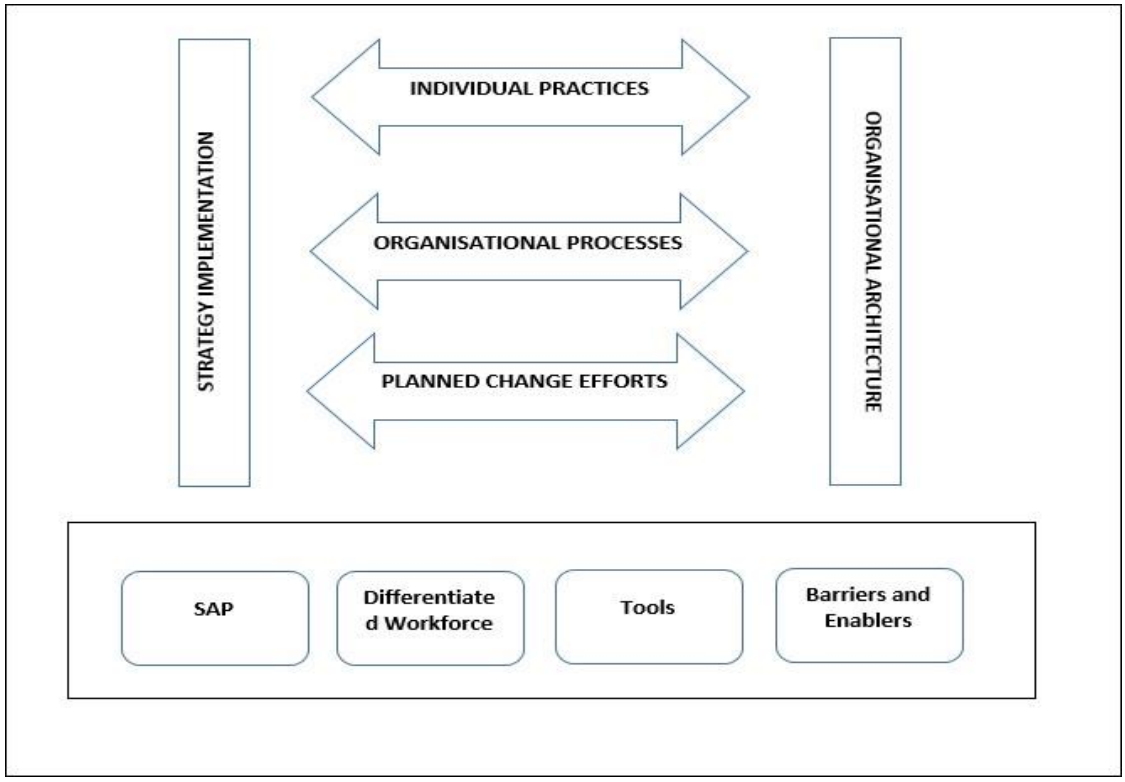
The current work on strategy is predominantly American, followed by Western Europe, and, more recently, there has been a resumed interest by Eastern countries. There is, however, still little research

attempting to investigate strategic management in South Africa, and the continent in general. Of the 3000 SAP membership worldwide, a small number are South Africans, indicating a major need for relevant studies and research relating to the African context.

The importance of strategy research in regard to the increasing role of the workforce in the dynamic and hyper-competitive modern environment has been highlighted by a growing number of scholars (Allio, 2003; Burnes, 2005; Glor, 2007; Lyle, 2012, Wesner, 2011). This study draws from the existing body of knowledge on strategic management, borrows from SHRM the concept of the differentiated workforce, and captures and applies from these fields what is relevant for participation in strategy implementation. Although a detailed discussion of the origins of these competing conceptual and analytical theoretical models of strategy frameworks is beyond the scope of this study, a brief introduction of the competing perspectives in participation and the compelling distinctions among them can be made. Such offerings within the realm of strategy implementation in particular, have been limited at best (Pryor et al., 2007). There is general support of the view that without a coherent and aligned strategy implementation process, even the most superior organisational formulated strategy is useless (Aaltonen & Ikavalko, 2002). It thereby points to the following conclusion as succinctly articulated by Biglar (2001), that strategy implementation will be one of the critical sources of sustainable advantage that will emerge in the 21st century.

This study is premised on the theoretical view that a solid basis for strategy implementation research does indeed exist. Whereas mainstream strategic management extent literature is guided by the tendency of researchers to assume that strategy formulation is the most important key element for strategic success, SAP sees both formulation and implementation as two sides of the same coin. Reed & Buckley (1985) argue that over the years, the research literature on strategy implementation tends to focus on specific subsidiary components within strategic implementation such as strategic control, the role of HR, organisational culture, TMT, middle management, strategy formulation, etc. To complicate the matter further, the literature is explicated in a multitude of academic and organisational disciplines (Neely, Mills, Platts, Gregory & Richards, 1994; Noble, 1999).

Figure 4 1: Theoretical Framework of the study



Source: Own compilation

How the literature has been synthesised into the perspective depicted is presented in Figure 4.1. It shows the key mainstreams of theory as illustrated and how these streams relate and integrate during strategy implementation. As pointed out, the influence and impact of organisational architecture, planned change activities, organisational processes and individual practices on strategy implementation have been confirmed. Similarly, the role of the differentiated workforce is core to the theme, and its influence is defined as the output from this study. To achieve this outcome, the SAP lens was used within the insurance context to define and identify the practices and processes in use by the differentiated workforce. The key assumption made in this study is that there is total integration between formulation and implementation.

Based on the extant literature, an integrative view is proposed that combines the dominant strategy view and the new emerging views of strategy implementation. The three core elements that emerged from the literature review include: conceptualising strategy, enacting strategy and coordinating strategic action. Hence, strategy implementation is seen as the continuous interplay of three interrelated activities, namely, conceptualising, enacting and coordinating. These enable an organisation to effect strategies through collective actions by organisational members. Conceptualising strategy is defined as the actions required in propagating and reassessing as

organisation's strategic direction. Conceptualising involves strategy making and implementation formulated by TMT and the broad and wider set of activities and practitioners that contribute to the outcome. Enacting strategy is the pattern of strategy implementation that is brought into being within the actions of people over time (Jarzabkowski et al., 2019; Weick, 2001). Enacting strategy comprises of the actions of diverse multiple practitioners and their engaging in interpreting and adjusting a given strategy to their contexts. Lastly coordinating strategic action is regarded as the deliberate activities directed at organised strategy implementation and the social dynamics through which people work interdependently of plans to realise collective action (Jarzabkowski et al., 2012).

The emergence of an integrated strategy implementation framework that would move research forward has been overlooked, despite Noble's (1999, p.119) call to bring together the "diversity of perspectives". The differences between the dominant view and the new adaptive view have become more pronounced. This study proposes an integrated perspective to develop a more complete understanding of the strategy implementation construct. The integrated view argues that that both views are more complementary in terms of the approaches they take and the empirical phenomena they adopt. Central to this perspective is the notion that research should pay closer attention to the on-going interplay between the conceptualising and enacting of strategies. This study hold that the continuous adaptations emerging from the social and behavioural dynamics of strategy implementation prompts changes and revisits in strategy that make adaptive strategy implementation more effective.

4.8. CHAPTER SUMMARY

This chapter has briefly described strategic management and the emerging field of SAP. To understand in greater depth how strategy practitioners develop their practices, the purpose of this section is to summarise the major aspects revealed during the examination of the literature in relation to this research. Firstly, the literature review attempted to understand what is meant by the term 'strategy' before examining the literature related to strategy practitioners in their strategy implementation.

It appears from the literature review that there is no agreed definition of strategy or strategic management within the mainstream academic strategic management community. On the other hand, within the SAP perspective, despite the fact that there is general agreement that the field of practices is the basis of research, the definition employed is very broad. Similarly, as identified by Nag et al. (2007), while there have been a number of attempts to determine what strategy means within an academic context, there still appear to be challenges about what the term strategy means to strategy

practitioners (Paroutis & Heracleous, 2013). Of significance, as Clegg et al. (2011) argue, it is generally agreed in the literature that a dominant strategy paradigm, based on rational, economic-based thinking, exists and has had a significant influence on strategic management to date. For this reason, the researcher is of the view that strategy practitioners, and their views on strategic management, may be influenced by this paradigm.

The purpose of this study is therefore to investigate the strategy implementation practices and activities of the differentiated workforce in the South African context, and how these processes are used by these key employees in strategy implementation. A few significant aspects in the field of strategic management and SAP are highlighted in the literature review. As identified by several scholars using the SAP lens, this study attempts to address the major challenges raised within the strategic management research domain. Also, the literature review has shown that a comprehensive study was done, that all critical areas of the subject matter were interrogated, and through a critical discussion, the latest current research and narratives on the field of study were highlighted. The research gap was recognised and further work was acknowledged. This formed the foundation and the basis for the exploration. More importantly, this study will contribute to the existing body of knowledge because there are limited accounts on the workforce as strategists and how the daily activities of the differentiated workforce shape and influence strategy implementation.

According to Chia & MacKay (2007), SAP is a growing field within the strategy process research paradigm. The young field in concerned with the doing of strategy: who does it, what do they do; how do they do it; what do they use and what implications this gas on influencing strategy (Jarzabkowski & Spee, 2009). This interest emanates from SAP attempts to humanise strategic management research. Hence SAP broad research parameters are the study of practitioners, practices and praxis (Jarzabkowski et al., 2007; Johnson et al., 2007; Whittington, 2006). SAP differs from conventional process research in its view of agency, multiple-level focus on the production and reproduction of strategic activities, in contrast to a a firm-level approach to explain strategic change and firm performance (Jarzabkowski, 2005; Johnson et al., 2007; Whittington, 2007). Even though SAP research agenda has been mainly on micro-phenomena, it is acknowledged that these are influenced by macro-outcomes (Carter et al., 2008). However, SAP approach is rooted in that strategy is what people do, thus stressing the criticality on the strategic practitioner (Jarzabkowski & Spee, 2011). The current pervasive view on practitioners has been TMT and middle management (Floyd & Wooldridge, 2000; Jarzabkowski & Spee, 2011), and other practitioners have been ignored.

The identification of the strategic roles, according to Floyd and Lane (2000), is a key component of strategy process research and main roles linked to strategic renewal and change agency are focus. There is growing interest on the importance of the role of middle level managers within the strategic

change formation process (Balogun, 2003; Balogun & Johnson, 2005, Floyd & Lane, 2000). Moreover, middle management agency is increasingly key to strategic renewal (Floyd & Lane, 2000) and successful implementation of deliberate strategy (Mantere, 2008).

Strategic renewal, and in particular implementation, is the most important strategic change process for an organisation's survival (Floyd & Lane, 2000) and the practices of mid-level managers and actors arguably are the hub of strategic renewal. From the SAP view the practices of the mid-level actors, and their strategising in the context of strategy implementation in the insurance business context in South Africa could be considered an important contribution to emergent thinking by the additional insight this thesis offers.

This thesis is focused on adding to the literature where the domains of strategic management and SAP research interlink and by contributing to some of the gaps that they have in common, answering the call to achieve cumulative knowledge (Floyd et al., 2011) and understanding of the strategic practices of the differentiated workforce, and specifically their strategy making and the practices they use in the context of strategic implementation in the insurance business context in South Africa (Vaara & Whittington, 2012; Jarzabkowski & Spee, 2009; Roueau, 2013; Whittington, 2006). This work builds on the recognition of the importance of the role of middle management and SAP research that takes a broader definition of who is a strategist, including lower-level employees as potential strategists (Jarzabkowski et al., 2007). It is important to identify these non-managerial actors as strategist and opening a research agenda that goes beyond TMT and middle managers to study other levels of employees as strategic actors. The important role of the differentiated workforce in influencing the organisation's sustained performance and success is being recognised and is inspired by the work of Floyd and Wooldridge (1992, 1994, 1996, 2000). Within SAP field, there are growing calls for greater insights to an emerging literature on the micro-activities of strategy, in particular the practices of the differentiated workforce that drive and guide those actions. This study offers a holistic overview of strategising and strategy implementation activities of mid-level actors by bringing together all the constructs from SAP perspective such as sensemaking, micro-strategising, tacit knowledge and narratives.

The next chapter will describe an appropriate research methodology for the exploration of the research questions and answer calls in the extant literature.

5. RESEARCH DESIGN AND METHODOLOGY

5.1. INTRODUCTION

This chapter reports on how the current research was carried out. The purpose of the study set the scene for the research design and methodology. Following an in-depth literature review in Chapters 2, 3 and 4, a qualitative case study design was deemed appropriate to answer the research questions. Also discussed is the way in which data were collected, analysed and interpreted. An interview guide was used to collect data. After being transcribed, semi-structured interviews were analysed using computer-assisted analysis, NVivo 11. To ensure data validity and reliability in line with the qualitative research method, measures of trustworthiness were used. The researcher's method in maintaining and conducting a study that adhered to ethical standards is also addressed in the chapter.

5.2. RESEARCH METHODOLOGY

Research methodology, as defined by Blaikie (2010), and Cresswell and Cresswell (2018), is a collective term for the structured process of conducting research, that is, the framework relating to the entire process of research. The authors further state that these methods are specific techniques of data collection and analysis aligned to the objectives of the research. In addition, scholars such as Babbie and Mouton (2006) use the concept "research methodology" to refer to an epistemic ideal of science. According to these researchers, science is committed to an "epistemic imperative" to search for valid explanations, and such explanations are only regarded as permissible if the explanation closely fits the available data. To this end, if the methodology used, for instance, can only find partial explanations, it would be impossible to analyse the merits of the findings arrived at. Babbie and Mouton (2006) assert that the motivation for making certain choices determines to what extent a given flaw would influence the validity of the conclusions attained and also make it possible for other researchers to identify possible methodological limitations. As a result, a discussion of the choice of the methodology and the research process used in this research are discussed in this chapter. The aim is to ascertain the reader's trust in the scope and the quality of the procedures used in this study. Therefore, the research design, the approach taken, the sampling strategy, data collection methods chosen, and the means of analysis, are all discussed in the following section.

5.3. RESEARCH PARADIGM

The decisions, processes, methods and designs required to define a particular methodology are guided and defined by the research paradigm. The constructivist-interpretivist research paradigm guided this

research. Constructivism, as identified by Hansen (2004), and Lincoln, Lynham and Guba (2011) as cited in Creswell and Creswell (2018), holds that rather than being an external and singular entity, reality is constructed in the mind of the individual and emerges through an individual's understanding of the environment or context. Interpretivism is an epistemological position, according to Saunders, Lewis and Thornhill (2016), that advocates the necessity to understand differences between humans in their roles as social actors. It is rooted in the individual's views and understanding of the situation being studied (Creswell & Creswell, 2018). Thus a constructivist-interpretivist approach is one that presupposes that reality is socially constructed and made meaningful (interpreted) by means of an individual's or actor's understanding of the context in which they find themselves. In support of this position, broad and general interview questions were used in this study, since, by these means, meaning could be forged through discussions or interactions with other people.

The characteristics of interpretivism, as used in this study are depicted in Table 5.1. They are grouped into the following; the purpose of the research, the nature of reality (ontology), nature of knowledge and the relationship between the inquirer and the inquired into epistemology and the methodology used (Cantrell, 2001).

Table 5.1: Characteristics of Interpretivism

Feature	Description
Purpose of research	• To explore the strategising practices of the differentiated workforce within the insurance industry
Ontology	• There are multiple realities • Realities can be explored and constructed through human interactions and meaningful actions • Discover how people make sense of their social worlds in the natural settings by means of daily routines, conversations and writings while interacting with others around them • Many social realties exist due to varying human experience
Epistemology	• Events are understood through mental processes of interpretation that is influenced by interaction with social contexts. • Those active in research process socially construct knowledge by experiencing the real life or natural settings • Inquirer and the inquired into are interlocked in an interactive process of talking, listening, reading and writin g. • More personal, interactive mode of data collection.
Method	• Process of data collected by text messages, interviews and reflective sessions; • Research is a product of the values of the researcher.

Source: Cantrell (2001)

Key words pertaining to this methodology, according to Henning, van Rensburg and Smit (2004), are engagement, participation and collaboration. The researcher using an interpretivist approach is a participant observer who discerns the meanings of action as they are expressed within specific social contexts as the researcher engages in the activities (Carr & Kemmis, 1986).

The centrality of the interaction between the investigator and the object of investigation is a differentiating feature of constructivism where deeper meaning is uncovered through interaction. To achieve the research objectives, the combination of constructivism with interpretivism provided for rich interpretations and descriptions. As the researcher aimed to collect deep data on the differentiated workforce's strategising practices, this research paradigm was deemed appropriate for this study.

5.4. RESEARCH DESIGN

A research design is a blueprint or a plan used to carry out research (Denzin & Lincoln, 2011; Marshall & Rossman, 2011; Mouton, 2011). Because the research was exploratory, a case study is the most appropriate research design in this instance, as recommended by Saunders et al. (2016). According to Mouton (2011) and Yin (2014), a case study usually refers to studies that are qualitative in nature and which explore a research topic or phenomenon within its context. Moreover, the aim is to provide an in-depth description of a single or small number of cases. In its attempts to illuminate a decision, a case study looks at why the decision was taken, how it was implemented, and with what results.

It is possible to distinguish between single and multiple case studies within a case study approach. While multiple cases call for the investigation of several cases (Blumberg, Cooper & Schindler, 2008; Yin, 2014), and fewer than 50 cases, the single case study relies on one case (Mouton, 2011). According to Yin (2014), multiple case studies are more appealing to knowledge creation as they yield more robust results. The cases may be chosen for several reasons when conducting multiple case studies. The reasons could be: to replicate previously selected cases, to extend emergent theory or to provide examples of disagreeable types (Eriksson & Kovalainen, 2008). Whether findings can be replicated across cases could be the rationale for using multiple cases.

Multiple case designs allow for cross-case analysis and comparisons and the investigation of a particular phenomenon in diverse settings. Multiple cases may also be used to produce contrasting results for predictable reasons (Yin, 2014, p.46). However, statistical generalisation to a population is not the goal of case-study research, as cases are not sampling units. Rather theoretical or analytical generalisation is appropriate where case study results are employed to develop theory or to test previously developed theory (Yin, 2014). From the perspective of the interpretive case study research, Walsham (1995) identifies four possible types of generalisations: development of concepts, generation of theory, drawing of specific implications, and contribution of rich insight. According to Walsham (1995, p. 79), these generalisations allow for "explanations of particular phenomena derived from empirical interpretive research" which may prove valuable in other settings and organisations as interpretations of phenomena, but which are not entirely predictive for future situations. Multiple cases are not chosen because more means a better sample, with a consequent generalisation to a wider population (Robson, 2002). To do so would not be in line with the interpretivist stance taken here. According to Stake (2005), cases are chosen because they lead to better understanding and theorising about a larger collection of cases. In order for the similarities and differences to be sufficiently illustrated, this study has a separate section in the next chapter to discuss the findings. In chapter six

there is a synthesis of all the cases, following Yin (2014), who held that both individual cases and multiple case results can and should be the focus of the research.

Stake (1995) distinguishes two types of case studies, intrinsic case studies and instrumental case studies. Stake (1995) argues that an intrinsic case study is undertaken because one wants better insights of a particular case, not because the case represents other cases or that it illustrates a particular problem, but instead because the case, in all its particularity and ordinariness, is of interest. This study was undertaken because of the main interest in this particular phenomenon. In contrast, an instrumental case study is used to provide understanding into an issue or redraw a generalisation (Stake, 1995). The case is of secondary interest, and plays a supportive role and facilitates understanding of something else. In this study, an intrinsic case study was adopted to get more insight of the differentiated workforce's strategy implementation practices in the insurance industry.

The insurance sector was the case used to investigate strategy implementation in insurance businesses, with 16 participants being selected from the industry in Johannesburg. The aim was to obtain a true picture of strategy implementation practices within a specific context. Case studies, according to Saunders et al. (2016), are often useful in answering "how" and "why" questions. As recommended by Mouton (2011), a case method was deemed beneficial as the main research question of the present study was more of a "how" question, that is, how the differentiated workforce implement strategy.

5.4.1. Research approach

The application of a qualitative research approach in studying the problem, according to Saunders et al. (2016), is covered by the interpretivist research approach. Qualitative research is interpretive and grounded in the life experiences of people and hence it is a situated activity that locates the observer in the world of the participants to gain in-depth understanding (Denzin & Lincoln, 2011; Marshall & Rossman, 2011). Qualitative research, according to Cottrell and McKenzie (2011), is constructed to answer questions about the complex nature of phenomena with the purpose of understanding, describing and explaining the phenomena investigated. While the qualitative researcher records words and phrases, looking for meaning, concepts or theory, the quantitative researcher, on the other hand, records numbers and conducts statistical tests. In this research, the researcher essentially attempted to explore how the differentiated workforce strategises to implement strategy, and not to measure any variables. A qualitative case study design is used in the present study because not much is known about strategy implementation practices by the differentiated workforce in the insurance industry.

5.4.2. Deductive and inductive views

According to Saunders et al. (2016), there are two approaches to research, that is, deductive and inductive views. Deductive reasoning occurs when the conclusion is reached logically from a set of premises with conclusion being true when all premises are true. These premises are statements that the researcher takes as true initially (Leedy & Ormrod, 2013). Hence deductive logic is valuable for generating research propositions and testing theories. The converse is true with inductive reasoning where there is a gap in the logic argument between the conclusion and the observed premises and the conclusion being judged to be supported by the observations made. In fact, inductive reasoning does not start with a pre-established truth, but rather begins with an observation. According to Leedy and Ormrod (2013), the aim is to make conclusions about objects or events. The current study followed both an inductive and a deductive logic because there were concepts that emerged from the research and from the literature respectively. The strategy implementation practices of the differentiated workforce were observed and assumed from the literature and the empirical investigation sought to draw conclusions on how the practitioners strategise and utilise strategy in implementation. No hypothesis or propositions were formulated in this case (Mouton, 2001).

The extent to which the researcher is clear about the theory at the beginning of the research raises an important question as to the design of the research project, namely as to whether a researcher uses a deductive approach in which a theory and hypothesis are developed, where research approach is designed to test the hypothesis (Saunders et al., 2016). Alternatively, a researcher can use an inductive approach, where the researcher will collect data and develop theory as a result of data analysis (Saunders et al., 2016). Veera, Balaji and Phil (2008) define the inductive research as a study in which theory is developed from the observation of empirical reality, while deductive approach is seen as moving from the general to the particular. Importantly, inductive approach is more likely to be concerned with the context in which such events are taking place. In sum, key data collection methods for inductive designs include observational strategies that allow the researcher to view behaviour without making a prior propositions, to describe behaviour that occurs naturally in settings. Inductive strategy informed by the research philosophy was adopted to draw conclusions on how the differentiated workforce utilise strategy implementation practices in the insurance business context.

There is dearth of research on the differentiated workforce strategy implementation practice within the insurance industry in South Africa. Therefore this implies that this study was exploratory in nature. Yin (2014) holds that a study can be considered exploratory when the knowledge base is insufficient to make good theoretical propositions prior to the start of data collection.

This study was conducted through an inductive process of building abstractions, concepts and theories about the differentiated workforce's strategy implementation practices using a combination of semi-

structured and qualitative interviews following a conversational methods. An inductive research was used to gain an accurate understanding of the differentiated workforce strategy implementation practices to produce empirical evidence and to create rich descriptions of practitioners.

5.5. DATA COLLECTION PROCEDURES

This section will elaborate on how data was collected and will justify the choice of data collection methods. The interview process is discussed as well as the rationale for data saturation to terminate when enough data was reached. The data transcription method that was used is explained.

5.5.1. Semi-structured interview

A characteristic method in qualitative research, with the aim of eliciting the thoughts and experiences of the respondents, is the interview which ranges from open-ended to more structured (Bryman & Bell, 2011). Although semi-structured interviews allow the interviewer to begin with a set of interview themes, they also allow for the order of questions to vary and for new questions to be asked in the context of the research situation (Saunders et al., 2016). Arguably, therefore, as identified by Cohen, Manion and Morrison (2000), this method allows researchers to shape the interview process. At the same time, however, the respondents were encouraged to follow new leads and share new themes. It is important to acknowledge that interviews provide a retrospective rather than a progressive understanding of the actors' actions associated with initiatives. In order to offer focus, reliability and increased validity (Yin, 2014) the interviews were carefully designed by means of an interview pro-forma containing both general and more specific questions. According to Pettigrew (1990), the choice of questions is guided by the content, process and context of the research, in this case on strategic roles of practitioners. The questions were grouped into the following topics: general, opening questions, strategic roles, organisational cognition and involvement of the differentiated workforce in strategising, their activity, and organisational outcomes. Yin (2014) asserts that the relationship between the researcher and the participant when using qualitative interviews is not strictly scripted. As the qualitative interview follows a conversational mode, the quality of the relationship is individualised for every participant. According to Cassel, Bishop, Symon, Johnson and Buehring (2009), collecting qualitative data is a skilful performance. The researcher, as the main active research instrument, can respond to and amend data collection processes as necessary in a given situation.

The framework for the questions constituted the semi-structured interview. Questions relating directly to the participants' conception of strategy, their roles in strategy at their organisation, and their

engagement with colleagues in terms of strategy were included in the interview schedule. The daily practices of the participants formed a theme within the questions. Strategies that had been communicated recently, whether through a communication campaign or a publication, and were identified as important to the organisation, were deemed strategic.

A semi-structured interview was employed because while still covering the same areas of data to be collected, it offered sufficient flexibility to approach different participants differently (Babbie, 2014; Saunders et al., 2016). Robson (2002) suggests that notes must be taken, even though the interview is recorded. The face-to-face interview at the premises of the participants was the format of this study. As there is limited theory, and no 'a priori' hypothesis (Eisenhardt, 1989), theory building from the field data followed best practice (Eisenhardt & Brown, 1997). Exploratory case studies do not start with propositions developed from prior literature. Rather the analytic strategy, according to Rowley (2002), is to develop a descriptive framework for organising the case study in order to direct the exploratory empirical study (Hartley, 1994).

The total interview time recorded was twenty five hours for both organisations chosen for the study. A digital recorder (Sony voice recorder) was used to record all the interviews, which were transmitted verbatim. The use of a transcriber meant that the researcher had to audit all the transcripts against the original audio recording. Tuckett (2005) claims that the auditing is considered very important for the overall trustworthiness of the data. According to Schwandt (1994), in line with Crotty's (1998) assumptions, transcribed interviews are treated as reflections of realities of those being studied, and not as text. This means that to uncover the participants' lived experiences, the research interview tried to understand the world from the participants' point of view to unfold the meaning of their experiences (Kvale, 1996).

5.5.2. Data collection instrument

Floyd and Wooldridge's Model of Strategic Roles (1992, 1994) was preferred as a guide for the semi-structured interview. The case-study protocol was the guide for the researcher during the data collection to generate a theory. The themes for the case-study protocol (Appendix C) were structured around the issues raised in the literature review relating to the strategising practices and roles of the differentiated workforce within the insurance industry. As King (2004) notes, the interview protocol may not necessarily be followed by the researcher if alternative and fruitful lines of inquiry arise during the interview. However, following Easterby-Smith, Thorpe and Lowe (2012), the researcher aimed to cover all of the themes during the interviews. On the basis of this view, Bryman and Bell (2011) maintain that in the semi-structured interview, using similar questions for each interview is

justified in multi-case study research because it is an appropriate level of structure to ensure cross-case comparability. Using semi-structured interviews allowed comparisons between the individual case study organisations to be made.

Essentially, rigorous data collection methods (Kitto, Chesters & Grbich 2008) influence the results of studies (Gibbs et al., 2007). Despite the popularity of semi-structured interviews as a data collection method, there is a lack of uniform procedures to construct a semi-structured interview in the literature (Pietila, Johnson & Kangasniemi, 2016). Pietila et al's (2016) findings on a semi- structured interview guide development include the following five stages: identifying the prerequisites for employing semi-structured interviews; obtaining and using previous knowledge; developing a preliminary interview guide; piloting the interview guide; and presenting the complete semi-structured interview guide.

5.5.2.1. Identifying the need for using semi-structured interviews

The purpose was to assess the relevance of the semi-structured interview as a rigorous data collection procedure in relation to the research question. This has been discussed fully in section 5.5.1. According to Turner (2010), the researcher has to determine some areas of the phenomenon based on previous knowledge before the interview.

5.5.2.2. Retrieving and using previous knowledge

This phase focused on gaining in-depth insight of the subject, which needed critical evaluation of previous knowledge and the need for complementary research knowledge. According to Turner (2010), this previous knowledge establishes a predetermined framework for the interview. In this study previous knowledge was based on conducting a comprehensive literature review which was embedded in the purpose of the study. The work of Davis (2013) and McEwan (2016) complemented this phase.

5.5.2.3. Formulating the preliminary interview guide

This phase attempted to formulate a guide that was logical and coherent in a structured form. To allow for dialogue during the interview, the guide had to be flexible and loose, so as to to be able to modify the order of questions as well as facilitate ease of movement from question to question. Care was taken to devise questions that were well formulated, participant-oriented, and clearly worded (Turner, 2010). The aim of the guide was to produce in-depth and spontaneous responses from participants. Words like what, who, where, when or how were used to facilitate descriptive answers (Chenail, 2011).

The guide comprised two levels of questions relating to a main theme and follow-up questions. The main themes focused on the central content of the research question. The order of the main themes was progressive and logical. To maintain the interview flow, follow-up questions were utilised to make themes more understandable by participants (Turner, 2010).

5.5.2.4. Pilot testing the interview guide

The aim here was to confirm the coverage and appropriateness of the content of the preliminary guide and to establish the possible need to change and test execution of the guide. Testing allowed for informed changes to the interview questions to ensure quality data collection (Chenail, 2011). The pilot test was conducted using three different techniques: internal testing, expert assessment and field-testing. According to Chenail (2011), internal testing refers to the analysis of the preliminary guide together with the research team (Chenail, 2011). The approach helps to clean the guide by removing ambiguities and interviewer bias (Chenail, 2011). Expert assessment is done by external experts to critique the guide in terms of the research questions of the study. Field testing is the testing of the potential study participants and was adopted for this study.

According to Saunders et al. (2016), piloting is s common practice that permits researchers the chance to evaluate their data collection method and get a view on how well it elicits the needed data and knowledge. The researcher considered piloting a prudent approach to follow given the responsive face-to-face interview approach being used. The guide was piloted within the financial services sector in October 2017 in Pretoria with four participants and was found to be suitable for this study. The interviews were conducted at the workplace and the logistics were facilitated by the HR department. The interview was audio recorded to ensure correct use of the device. During the exercise, attention was given to body language, non-verbal responses, and the manner of asking questions. As the researcher was the main data collection instrument, the pilot study provided insight into the phenomenon studied, increasing experience in interviewing as well as enhancing interpersonal skills. A few corrections were made on the guide, such as semantic errors, link errors and instructions.

A direct result of the pilot process was the development of a checklist that the researcher used for interview planning. The checklist included the following: contact details and information of participants, venue arrangements, voice recorder with spare batteries, folder with consent forms, the interview guide, pens and signed participant sheets. Field notes after each interview were completed

Presenting the complete semi-structured interview guide was the last phase. This produced a logical, clear and completed interview guide that was used for data collection and proved to be an appropriate mechanism to address the research question.

5.5.3. Reflexivity

Reflexivity is an important component in qualitative research (Mauthner & Darcet, 2003; Salmons, 2016; Watt, 2007). Salmons (2016) sees reflexivity as a chronological record of the evolution of the study. At the research site, for example, the researcher's inherent pursuit to understand the meaning of organisational reality of the participant is crucial (Denzin & Lincoln, 1994; Babbie, 2016). A reflexive journal was used to record the researcher's surfacing awareness and experiences during the current study and to reflect on what had transpired during the research process (Yin, 2010; Rouleau & Balogun, 2011; Leedy & Ormrod, 2013). The researcher used the personal reflective journal to enhance his understanding during data gathering. In addition, qualitative data provided depth and detail through direct quotation and careful analysis of observed behaviour and interactions. This implies an interactive researcher-participant dialogue and follows the research paradigm wherein an assumption of the constructive nature of reality is followed by an epistemological assumption that the researcher gleaned knowledge by interacting with the participants, and engaged in self-reflexive questioning as the primary instrument of data collection and analysis.

5.5.4. Population of study

The complete set of group members is the population (Saunders et al., 2016). The research participants were selected from the target population of the research which is, in this case, the differentiated workforce within the insurance industry in South Africa. A sampling frame, Saunders and Lewis (2012) assert is the complete list of all members of the total population from which the sample is drawn. According to Cooper and Schindler (2014), ideally a sampling frame is a complete list of population members only. A total of 120 group members from Company A was identified, and 80 from Company B, which constituted the sampling frame for this study. All the business divisions and units in the two organisations, such as Finance, Client Solutions, Business Enablement and Distribution, were included.

5.5.5. The sampling strategy

Choosing the number of participants is neither systematic nor mathematic in qualitative studies. According to Yin (2014), defining the desired number of participants has no set formula. Sample size considerations, as Onwuegbuzie and Leech (2005) mention, entail making a series of decisions such as: how many individuals to include in a study; how to select them; and the conditions under which this selection will take place.

Miles and Huberman (1994) report that the trustworthiness of the findings is measured, not in terms of the number of participants, but in terms of the richness of the information gathered. Hence, the actual sample is more important than the size of the sample selected. For a study that would yield rich data, the aim of the sampling in this study was to select relevant participants.

In the context of this study, the differentiated workforce, which constituted the sample, included key and strategic employees and professionals who were not in management positions. An "A" or key position in this study was defined primarily "by its impact on strategy and by the range in the performance level of the people in these positions" (Becker et al., 2009, p. 60). The following criteria were used to identify the differentiated workforce in the study:

- Strategic impact, that is, jobs are strategic when they have a disproportionate impact on the organisation's ability to execute business strategy through its capabilities.
- Performance variability means that the gap between low and high performance in this role is substantial.
- These positions are usually less than 20% of the total workforce.
- Employees are hard to get because top talent is difficult to attract and retain.

A non-probability purposive sample was drawn. A distinction is made between probability and non-probability sampling. While probability sampling is characterised by random samples, stratified samples, systematic samples and cluster samples, non-probability sampling on the other hand, is about accidental samples, quota samples, snowball samples, purposive samples and convenient samples. Probability sampling remains the optimal method of sampling as it strives to:

> select a set of elements from a population in such a way that descriptions of those elements (statistics) accurately portray the parameters of the total population from which the elements were selected (Babbie & Mouton, 2006, p.175).

Because this type of sampling method is fraught with problems in social research, non-probability techniques are often the most practical solution. As a means of generating an appropriate sample, for the reasons indicated, the current research made use of non-probability sampling. A claim of sample representativity of key employees working in the insurance industry in South African organisations cannot therefore be made in this study. This is owing, in particular, to the use of purposive sampling. Many scholars (Cooper & Schindler, 2014; Johnson, Omuweugbuzie & Turner, 2007; Saunders et al., 2016) explain that the aim of purposive sampling is not to establish a representative sample but rather to identify key informants whose context-specific knowledge and expertise regarding the issues

relevant to the research are insightful and rich in information. The sample elements, though selected arbitrarily, were based on their adherence to certain criteria as indicated above. As in this case, the sample should relate in some systematic manner to what qualitative research scholars refer to as the phenomena that the study seeks to examine (Mason, 1996; May, 2002). To achieve the research aim, the participants selected as the sample must be able to assist in this regard.

5.5.5.1. Sample size

The purpose is seldom to arrive at statistically valid conclusions in qualitative research. Rather, the aim, as identified by Thomas and Magilvy (2011), is to explore, in depth, an experience or a phenomenon about which to accumulate knowledge. According to Guest, Bunce and Johnson (2006), the size of the purposive sample is normally determined by the notion of saturation. Moreover, when it comes to qualitative research, there is no ideal sample size. Instead, the qualitative design being used determines the sample size (Creswell, 2014). Creswell (2014) proposes four to five participants, while Eisenhardt proposes between four and ten. Extending this view, Guest et al. (2006) contend that sample size is sometimes influenced by the interview structure, participant homogeneity, and content. Because a similar set of questions will be asked to all participants, a certain degree of structure will warrant fewer participants. According to Guest et al. (2006), 12 interviews should suffice, or at times even fewer, in studies where the sample consists of relatively homogeneous units. It was empirically found that this is the point of saturation. In this study the sample size 16, as suggested by Guest et al. (2006), was used by the researcher because the sample was homogeneous with the participants drawn from the insurance industry and categorised as key employees in the two organisations. Saunders et al. (2016) recommend continuing to collect qualitative data until saturation is reached which is when no more new themes emerge from additional data. Hence, the number of participants interviewed in this study was within the norm.

These participants were, variously, actuaries, IT specialists, risk control consultants, HR specialists, claims adjusters, accountants, the key account manager, the product manager, and the alternative distribution head, and were selected from the two organisations. From the initial group of 20 participants who were identified by their respective organisations, four withdrew owing to other work commitments. The third organisation that had 10 participants identified cancelled on the day of the interview because the company had not given permission to authorise the research.

5.5.6. Data saturation

Saunders et al. (2016) cite several scholars who have suggested that until data saturation is reached the researcher should continue to conduct interviews. Despite this, however, Guest et al. (2006) say that while this rule is commonly used in published articles, the term "theoretical saturation" has become diffuse and vague. A number of definitions of saturation have been posited and some of the more useful are provided as follows. Morse (1995) sees saturation as having attained data adequacy when additional interviews provide few new insights, then data adequacy is achieved. Suarez-Ortega (2013) also subscribes to this view. The author believes that in general, owing to rich data from each participant, saturation within histories tends to be a relatively low number. In continuing with this line of reasoning, McEwan (2016) argues that while general advice in regard to data saturation is provided in research methods texts, how this should be evaluated is limited. Reflecting on the wide variety of methodologies available on the different ways of data adequacy, Guest et al. (2006) indicate that determining how many interviews to reach saturation is difficult. In essence, therefore, the sole purpose of this section is to describe the process followed to determine if adequacy is met. The vexing question is, have enough data been collected to answer the research question?

An important point of departure in the data collection process is to clarify the method used to select and identify the differentiated workforce as the targeted strategy practitioners. Preliminary data analysis was conducted through the pilot process, then, as interviews were conducted and transcribed, light was shed on the research question.

Overall, the number of interviews conducted in this study is similar to other PhD level research employing an interview-based qualitative approach. With respect to the estimation of data adequacy, what is significant is not the number of interviews conducted so much as the outcome of the interview process itself. A pre-determined number was therefore not considered to reflect sampling adequateness.

Saturation is the gold standard by which purposive sample sizes are determined (Guest et al., 2006). Morse (1995) observes that there are unfortunately no published guidelines for estimating the sample size while admitting that saturation is the key to excellent qualitative work. Glaser and Strauss (1967, p. 65) first defined "theoretical saturation" as the point at which "no additional data are being found". However, theoretical saturation refers specifically to the development of theory for research adopting a grounded theory approach (Patton, 2002). For this research, "saturation" is reached in data collection and analysis when new information produces little or no change (Guest et al., 2006) to the codes in the template developed for the study.

While reading transcripts in Company A and Company B, some themes or codes, for example the tools used for strategy work, the key enablers of strategy work, facilitating adaptability, and

compliance, were identified repeatedly from analysis of earlier interviews, and this suggested the possibility that data saturation had been reached (Guest et al., 2006). More interviews could not have been necessarily a justification for "representativeness" of the study as that was not the direction the research was taking.

5.5.7. Data transcription

According to Lapadat and Lindsay (1999) and Davidson (2009), transcription employing interviewing has become a ubiquitous part of qualitative research. It is equally important to justify why the approach used to transcribe the interviews is appropriate as it is to justify the method employed to select participants. The purpose of this section is to explain the data transcription approach used in this study.

Despite its relevance, the methods and rationale for transcription are often omitted. As identified by Kvale and Brinkmann (2009), a process transcription includes changing a live interactive and social event into a static textual form. These authors contend that it is important to state the reasons why and to indicate how this was performed. Furthermore, they argue that research's validity can be increased by clear transcription decisions. Lapadat (2000) proposes that if transcripts are regarded as interpretive and analytic tools, then suitable decisions about transcription options should be made.

It is important to identify why transcription was needed before discussing which choice is suitable for the study. The following two purposes were considered that could be used for the purpose of this study (Kvale & Brinkmann, 2009). Firstly, participants could be given a chance to change the interview data, and, secondly, data analysis is facilitated with this method.

While participants could be afforded the chance to change an earlier interview, it was determined that this was unnecessary for it could not add value to the research process. In many regards, allowing participants the opportunity to edit and correct also introduces the question of which reflection should be captured (McEwan, 2016).

When turning to the aspect of data analysis, there is a strong argument that transcription offers considerable advantages. From a practical sense, a written text, whether on paper or in electronic form, Lapadat (2000) argues, can be operated on analytically and be quoted from, copied, sorted and inspected. Thus, data analysis cannot be conducted effectively without a transcript.

Lapadat (2000) further points out that as there is not an exhaustive transcription system that suits all research, there are a number of ways of approaching transcription. Importantly, there needs to be alignment between the method used and the research question and focus. Some authors (e.g., Poland,

1995; Kvale & Brinkmann, 2009) observe that it is not possible to create an equivalent textual representation because transcription is an interpretive activity of a human communication event. As Kvale (1995) suggests, the main question therefore is: Is there a valid translation from oral to written language in this case?

As has been identified by Riessman (2008), the major purpose of this research is on *what* is said and not on how, to whom or for what purposes. It was therefore important that participants' stories had to be captured in their own words and as accurately as possible. In this research it was not necessary to record how stories were narrated (Lapadat, 2000). In addition, a more detailed transcription used in conversation analysis would be unnecessary for this study. To create what Poland (1995, p. 291) defined as "a faithful reproduction of the aural record", verbatim transcription was followed.

Equally, all data recorded before and after the interview were transcribed. When the interview topic was sidetracked, these remarks were not transcribed. To build rapport both before and after the interview, a wide range of topics outside the focus of the research was discussed to break the ice.

No attempt was made to make the text grammatically correct, and the language was captured using basic punctuation. To allow the transcripts to reflect the conversation flow, conventions were employed. Three dots were used to indicate where sentences were incomplete, and, similarly, when short interjections or responses were made from the other participants, these were included in brackets within longer tracts of text.

Transcribing all the interviews allowed the researcher to be more intimate with the data and the participants. The interviews were re-lived by replaying the recordings many times, and this allowed more in-depth insights into the discussions.

The first interview conducted was transcribed taking note of how long this task took and as an estimate to the amount of time the transcription process would take. It took 1 hour, 22 minutes for the whole interview, and it took approximately six hours to complete the transcription. In the subsequent interviews the process was enhanced by employing a transcription kit. This kit provided the ability to rewind, start and stop the audio while typing continued. An additional feature was the ability to vary the speed of playback and so slow the interview down when necessary.

The transcription process not only aligned with the purpose of the research but allowed the interviews to be captured in such a way to achieve a greater understanding of the data. This factor resonates with Merrill and West's (2009) observation that it is important to listen to, as well as read, the transcripts, if the transcription is being performed by a third party. To further facilitate this process, the use of

time stamps during transcription allowed for the transcripts to be loaded into NVivo11, which is the analytical software application used, and which could automatically be aligned with the audio file. At any point, if clarification or insight was needed, it was possible to play back the interview.

5.6. DATA ANALYSIS

The recorded in-depth interviews were transcribed and analysed using NVivo 11 which supports the analysis of text-based documents and allows for inductive analysis (Saldana, 2011). NVivo 11 helped the researcher to narrow the analytic focus through codes and themes and to manage the data through families and quotations. Through close line-by-line analysis the outputs allowed the researcher to engage with the data.

Qualitative interview data can be analysed in many different ways. The method selected, as Rubin and Rubin (2012) point out, needs to be aligned with the research methodology, method, and research question. Before settling on a thematic analysis, a number of analysis techniques were examined.

Content analysis, as a process that effectively converts qualitative data into quantitative data, was excluded as it runs counter to the methodological foundations of this research. Grounded theory (Glaser & Strauss, 1967) has proven to be a common method used by content analysis. According to Cooper and Schindler (2014), content analysis is a systematic, objective and quantitative research analysis technique for the visible content of some form of communication. It would be inconsistent, at best, to conduct analysis under grounded theory as this research was not based on grounded theory.

Discourse analysis did not appear suitable as the method used to collect data and the research question. According to Gill (2000), discourse analysis is generally more interested in analysing how the social world is created and maintained through language and has many different theoretical and practical ways of being implemented (Liamputtong, 2009). As the author argues, the focus in discourse analysis is on the discourse itself, and not on the content of the narratives, thus it would not be suitable for this study.

Thematic analysis was selected as the most suitable form since this research focuses on what is said by the participants and thus a narrative approach was deemed suitable. Braun and Clark (2006) point out that a thematic analysis of collected narratives is ideally suited to analysing, understanding and identifying themes within the data. Braun and Clark (2006) provide a useful framework for conducting a rigorous and robust thematic analysis.

To avoid criticism of this qualitative research study being labelled nebulous, or “airy fairy”, as pointed out by Labuschagne (2003), the researcher aligned the narrative elements of the research with

thematic analysis from the coding to the analysis. As was indicated earlier, thematic analysis identifies themes or patterns in the data either inductively or deductively (Braun & Clarke, 2006; Clarke & Braun, 2011). While an inductive approach is data driven connecting the themes to the data, a deductive logic focuses on a researcher's theoretical interest in an area of research and is researcher-driven. This study therefore used Braun and Clarke's (2006) data-driven inductive and deductive approaches to analyse the data from the theoretical perspectives of SAP (Jarzabkowski & Seidl, 2012) and strategy implementation (Ikavalko, 2005; Hrebiniak, 2006).

5.6.1. Process of Data Analysis

Although this section is written mainly in a linear fashion, with the analysis occurring at the end of the data collection, the actual process employed was an iterative one, in line with advice from leading qualitative research scholars (Denzil & Lincoln, 2011; Morse et al., 2002: Merrill & West, 2009). In this study, data analysis started as soon as data collection commenced. Importantly, the researcher became part of the conversation, a co-author of the research, in line with the method selected (Williams, 1984). Furthermore, the meaning participants placed on experiences, and the reflection on what was said, allowed for data integration. Similarly, field notes collected after each interview allowed for immediate analysis and reflection. These protocols govern qualitative research; in fact, they distinguish qualitative research from quantitative research.

Before transcribing the interviews, the researcher listened to the audios first to understand the meaning conveyed by the participants. Full meaning of what the participants were saying was precisely captured and transcribed. After transcribing the information, to ensure reliability of the data, the transcribed interviews were reviewed, and the typos were systematically removed before the coding process began and chunks of meaning were identified and labelled.

To analyse the data retrieved from the 16 participants who took part in the research study from the Financial Services sector, a thematic analysis methodology of data analysis was used, following Braun and Clarke's (2006) thematic analysis. The data was coded, prepared and categorised, themes were developed, refined and finalised after transcribing the interviews and using the thematic analysis procedure. To make sense of the data and provide relevant themes that speak to the research questions and objectives of the study, a thematic analysis was used. Table 5.2 depicts the process of thematic analysis according to Braun &Clarke (2006).

Table 5.2: Process of thematic analysis

Phase	Description of the process
Familiarising yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
Generating initial codes	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme.
Reviewing themes	Checking if the themes work about the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.
Defining and naming themes:	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.
Producing the report:	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back to the analysis the research question and literature, producing a scholarly report of the analysis.

Thematic Analysis (Braun &Clarke, 2006)

The preparation and cleaning process of the data for coding included a thorough review of the transcripts, getting rid of missing words and all typos. Relevant paragraphs were highlighted in this preliminary reading, as suggested by Creswell (2013, p. 205). To augment the coding, the interview transcripts were looked at through lexical queries such as word frequency and text search queries using NVivo 11.

5.6.2. Coding Process

Saldana's (2009) coding manual informed the coding process. The researcher involved two qalitative data analysis experts in the coding process to ensure credibility, accuracy and transparency, because "these kinds of checks are sometimes seen as indicators of trustworthiness of the coding process, and they contribute to the validity of the conclusions drawn from the codes" (Basely & Jackson 2013, p. 93). Moreover, a Computer Assisted Qualitative Data Analysis Software (CAQDAS) NVivo 11 was used for more accuracy and more depth in the data analysis. It has robust search and retrieve functions and is regarded as a powerful database in terms of storing transcribed material, allowing researchers to handle very large data sets.

As units of analysis, the researcher focused on themes that explore workforce differentiation and their strategy implementation practices in a South African business organisational context and used open coding by assigning initial codes or labels. Following Saldana's (2009) first cycle coding, coding

methods such as process coding and descriptive coding were included. Codes were systematically sorted into a codebook according to their categories, types and relationships after the creation of codes. At first 89 codes were developed. After refining, they were collapsed and some were deleted with 52 as the final number of parent codes. By means of a combination of deductive and inductive data analysis process, five main themes emerged, and they shall be outlined in the following section.

Myers (2013) asserts that coding is analysis and refers to labels used to give units of meaning to units of data collected. A code, according to Saldana (2013), is most often a short phrase that captures a summative attribute to a portion of language-based data. Coding was the first phase used. The researcher grouped similar data into 'families' based on shared features (Saldana, 2013). In the same vein, some predetermined categories were derived from the semi-structured interviews. Attaching those categories that are relevant to specific units of data and developing meaningful categories is called categorising (Saunders & Lewis, 2012). Importantly, further refining newly identified categories enriched existing theory with more insights.

Krippendorff (2013) states that coding decreases a diversity of units to convenient classes in the analysis. Categorisation is about naming or giving labels to events found in the text. For example, all the activities or processes that fall under a particular concept were put together. To analyse knowledge that was obtained from the data, the researcher used NVivo 11 to help with thematic analysis. In qualitative research data analysis seeks to elicit meaning from the data in a rigorous, systematic and comprehensive manner (Henning, Rensburg & Smit, 2004). Marshall and Rossman (2011) say that the researcher starts the process of interpretation of the data as categories develop and coding is under way. In line with qualitative research, interpretations are only as valid as the data they are based on. The trustworthiness of the study is paramount and will be discussed later.

5.6.3. Computer-assisted data analysis

Despite criticisms of reliance on computer analysis, computer-assisted qualitative data analysis software (CAQDAS) has become a common tool for the qualitative researcher (Easterby-Smith et al., 2002; Yin, 2014). The ability to conduct frequency by the data, as Bringer, Johnston and Brackenridge (2004) suggest, can lead to an inappropriate quantification of the research study. Likewise, this can result in fragmentation of the data which then loses its narrative flow. As Bryman and Bell (2011) highlight, the protection of the narrative flow is the very anchor on which the qualitative approach is taken in the first place.

However, there are advantages in using the CAQDAS. Bryman and Bell (2011) note that laborious tasks such as photocopying and highlighting are eliminated and can now be automated. With a

congruence of analysis and theory evident from the documentation of the research, one of the main advantages of CAQDAS is that it allows a level of transparency of method (Bringer, Johnson & Brackenridge, 2004; Bryman & Bell, 2011). Similarly, Wickham and Woods (2005) support this view. For instance, features such as the capability to code multiple categories, the support of complex code structures, and the facility to construct searchable memos and annotations are identified.

In this study, with the help of the qualitative data analysis software package NVivo 11 produced by Qsrinternational, data analysis was carried out. There is no specific software package that is best for qualitative data. The methodology chosen and the experience of the researcher, as Weitzman (2000) states, are the commonly used criteria upon which to make judgement. The reasons for choosing NVivo 11 aligned with the features offered: searchable annotations and hierarchical categories, and the vast online support and textbook (Richards, 1995, p. 2005). Field notes and transcripts from interviews were imported into the software.

As indicated previously, based on the research aim and research questions, a preliminary set of codes was established prior to analysis. These major factors were embedded from the literature review. The first stage of the NVivo 11 coding project was informed by these issues, as indeed they did for the emerging interview themes. A hierarchy of themes has been discussed in section 4.6.1 (see Table 4.1). To search for a common thread that ran through the themes, a subsequent analysis of this hierarchy was conducted. NVivo 11 was a useful tool to store the data in nodes and in themes. And because data could be laid out, it allowed the researcher to see emerging patterns. The hierarchical theme structure that emerged from data analysis, is shown as the summary theme structure (Appendix D). Several refinements gave rise to the final template that was developed. These pre-defined codes or *a priori* themes, it should be reiterated, emerged from the literature review, which then led to the choice of the interview guide to answer the research question. Central to the approach taken here is the idea that software cannot replace or duplicate analysis of the data by the researcher (Easerby-Smith et al., 2002; Weitzman, 2000) but it did allow comparison to be made easily. This meant that themes and ideas could be teased out of the data more readily.

5.6.4. Interpreting and Reporting

The analysis process, as was mentioned, was carried out in two phases: first-order coding and second-order coding. The analysis of the data was conducted with due regard to the unique insurance organisational business context. The researcher examined all coded data identifying salient trends or patterns (second-order coding), after going through the first-order coding. To determine which relationships existed between other data and within the coded data, the data was re-read in the review

process and after this the coded data was progressively put together, moving from the particular to the general. The researcher, in other words, tried to make sense of the data for each developing theme as a unified story. Charmaz (1990, p.1168) calls this thematic development a “sculpting of contoured ideas”. According to Miles and Huberman (1994), this process of data conclusion and reduction, verification and drawing, assists the creation of a level of abstraction. It was complemented by a comparison of data within and across themes and was perfected by the ongoing literature review. This iterative process meant that the themes could be refined continuously. As a result, as the researcher moved between description and abstraction the early thematic schema developed.

Similarly, two co-coders read and analysed the interviews. The data were coded independently without trying to fit them into a pre-existing coding frame. Coding experts met with the researcher to discuss and share their findings. Moreover, the evaluation of participants and their practices was based on the themes dominating interviews. By showing the analysis with illustrative quotations best representing the core theme, the researcher sought to validate the findings by making his judgements transparent, and used reflexivity to record his own bias, values and assumptions.

Through interpretation, in line with the view of Stake (2010), the choices of action and methods to analyse the data were reached. According to Stake, the experience of the researcher, the experience of the participants studied, and the experience of those to whom information was conveyed, are the factors on which those interpretations depended. The professional knowledge of this research relies mainly on personal experience within South African organisational settings and academic training.
The researcher followed Yin’s (2014) inside-out approach in composing this treatise. The predominantly inductive nature of the research is due to the many initial insights and findings that came from concrete and specific events from the empirical research. According to Yin (2014), the “inside" comprises the specific field experiences and evidence that will be presented. Conversely, the “outside” explains the narrative that surrounds these specific field experiences and data and reflects the researcher’s entire line of thinking.

In explaining the themes evolving from the interviews, this study adopted a theory-building approach. The constructs and conceptual framing are grounded in the data in this interpretive, primarily inductive, research method. Davis (2013) considers this the meeting place for induction and deduction, even when the reporting style may appear deductive.

To manage information, several primary documents were imported into the software programme. The primary document number with the participant’s names, high-level information on the backgrounds of participants, their current positions, and details of their tertiary education, were imported into NVivo 11. The information on tertiary education is very important as a key criterion in determining

the participants' strategic and pivotal role in achieving the organisational objectives. This was discussed in the sampling strategy (section 5.5.5).

5.6.5. Key data analysis: milestones of the study

According to Labuschagne (2003), in order to discover patterns, themes, forms and qualities found in the field notes, interviews, transcripts, open-ended questionnaires, diaries and case studies, qualitative analysis of data comprises the non-numerical organisational data. The nature of qualitative research, with its complexity, diversity and nuance, as Braun and Clarke (2006) argue, calls for flexibility in its approach to analysis. Conversation analysis, interpretive phenomenological analysis, discourse analysis, narrative analysis and thematic analysis are examples of qualitative analytic methods. The data analysis of this study follows an inductive design.

As previously mentioned, one of the approaches to analysing qualitative data is thematic analysis. In particular, it reports, analyses and identifies patterns (themes) within the data. It organises and explains data in rich detail (Braun & Clarke, 2006). In this study, Schulz's (1967) two-stage process to interpretive understanding was used to make sense of the phenomena under investigation, i.e., to identify a multitude of codes. Then an attempt was made to identify themes through which to interpret the strategy implementation practices of the differentiated workforce. A co-coder was invited from a different subject field. The process developed by Saldana (2011) was used to analyse data. The pilot phase of the study contributed to the process of developing coding scheme and was regularly monitored throughout the data collection process. After manual coding, to help manage the huge volumes of data efficiently, documents were imported into the software programme

For opinions on the research process, ongoing discussions with the supervisor and peers were solicited. Also, continuous, constant comparisons of current transcripts with previous ones were conducted to allow for the emergence of themes that were not considered initially. The following approach was followed regarding the practical aspects of the data analysis for the study:

- Transcribed interviews were the key for the analysis of the content as source of data;
- All notes were discussed and recorded;
- Reflective research diary and field notes enhanced primary data;
- Extensive literature was reviewed;
- Each interview transcript was read and annotated by including the field notes and observations during re-listening of the interviews;

- Concepts were labelled and texts were combined into one unit;
- Recording identified codable moments;
- The pilot phase's manual coding assisted later further coding and analysis;
- Coding units were defined as a group of words that could be coded under a criterion category – some word sets attracted multiple code allocation;
- Data was imported into NVivo 11 software;
- Where verbatim data extracts were used, a data reference system was developed;
- Coding consensus meetings between the researcher and independent qualitative research consultants to contribute to triangulation were arranged.

Overall, all sources of information collected were retained in an audit-ready format. In particular, by enabling others to evaluate the same phenomenon from various views, and to enrich the research understanding by allowing for a new deeper dimension to emerge, provided for triangulation processes.

The analysis was conducted on two levels, that is, semantic and latent. The aim of the analysis was to provide a description of the semantic content and then to interpret it for broader meaning and implication in relation to the extant literature. The involvement of the co-coder allowed the analysis to be taken to a latent level. According to Braun and Clark (2006), because it identifies and examines the underlying ideas, assumptions and conceptualisations, thematic analysis on a latent level goes beyond the semantic level. In fact, interpretive work was based on the development of the themes. At the same time, the latent analysis formed part of the social constructivism.

5.6.5.1. Triangulation

According to Schneider, Elliot, Lobiondo-Wood & Haber (2003), triangulation can be seen as the use of more than one method in the investigation of a research question in order to increase confidence in the research findings. As stated by Mason (2002), triangulation endeavours to support one approach with another in order to improve the quality of the data. Easterby-Smith et al. (2004) identify the following four forms of triangulation:

- Data triangulation, which refers to the use of data collected from different sources or at different times;

- Methodological triangulation, which entails the use of more than one method of gathering data;
- Theoretical triangulation which is the application of a theory for a different discipline;
- Investigator triangulation involves the use of more than one researcher to gather and interpret data.

This research uses data triangulation as a strategy whereby different data sources from two organisations may be gathered. Data triangulation, as seen by Robert and Taylor (2002), is the use of multiple sources at different times, in different places, and with different people, to obtain varied views about a situation in one study. The result was that through the analysis of multiple sources and from different places, a richness and depth is realised within both South African insurance organisations in this study. Data from multiple sources results in cross-checking and thus validates the findings. To this end, the quality and depth of the results are enhanced. Barbour (1998) argues that by providing in-depth data, data triangulation adds to confidence in the results. By exploring different views, Taylor, Kermode and Roberts (2007) advocate that findings are confirmed by different data sources. Also, the involvement of a co-coder brought multiple minds and ways in analysing and interpreting data. The coding consultant did not review the literature on which the study is based and was from a different discipline. The themes were not driven by theoretical interest and were identified through the inductive approach, that is, codes were data-driven. Investigator triangulation added to confidence in the results (Miles & Huberman, 1984; Yin, 2014).

5.7. QUALITY, RELIABILITY AND VALIDITY

As data collected through qualitative research is often seen as more problematic than in quantitative research, issues concerning data reliability and validity are now discussed (Denzin & Lincoln, 2011). To ensure that data quality was maintained during all stages of the research process, attention to data reliability and quality was highlighted. This resonates with the approach advocated by Morse et al. (2002), who argue that qualitative researchers should employ mechanisms throughout the research process that consistently contribute to ensuring rigour. This view corroborates similar advice from Kvale and Brinkmann (2009) who emphasise the significance of a focus on quality throughout the research process, something they call a key constructive approach. Kvale and Brinkmann (2009) suggest the following range of strategies: ensuring congruence between research question and the components of the method; using an appropriate sample consisting of participants who best represent the research topic and collecting and analysing data concurrently.

It is difficult to define high-quality qualitative research. Cassell et al. (2009) indicate that there is no one generally accepted definition of what high-quality qualitative research means. Rather, there are a variety of criteria in use in this contested terrain.

Yin (2014) explains three objectives for building the trustworthiness and credibility of a qualitative study. The first objective deals with transparency. Here the researcher is subjected to scrutiny which could be criticism, support or refinement. The second objective is the methodological order of the study. This could include deliberate distortion in carrying out research or avoiding unexplained bias (Yin, 2014). The third objective pertains to the fact that the starting point of qualitative research is a clear set of evidence (Yin, 2014). This implies that the evidence should be based on participants' actual language as well as the context within which the language would be expressed. The language, representing the reality, is valued in these contexts.

The current study complied with these objectives in the following ways:

5.7.1. Trustworthiness

According to Lincoln and Guba (1985), trustworthiness is to ensure that the study undertaken is transferable, dependable, confirmable and credible in a qualitative study. The focus in the credibility of the findings is on the trustworthiness of the data as the study undertaken is predominantly a qualitative research. The methodology, design and the analysis confirm the actual trustworthiness of the outcome. Rigour in qualitative research is useful for establishing consistency of study methods over time and is a way to determine trust in the research findings.

5.7.1.1. Credibility

Credibility, as explained by Houghton, Casey Shaw and Murphy (2013), refers to the value and believability of the findings. Simply stated, it means the quality of being believed and accepted as true, real or honest. Credibility is about truth value and truth in reality. More importantly, Lincoln and Guba (1985) highlight that credibility is an evaluation of whether or not the research outcome represents a credible interpretation of the different types of data produced by the study. To ensure that the research outcomes and interpretations made are a true reflection of the original data obtained for this research, the following actions were carried out:

- The use of triangulation was the first method used to ensure credibility as a data gathering method. Information was collected from two organisations, thereby eliminating bias and getting a wider spread.

- The data was obtained from semi-structured interviews and documents obtained from the insurance sector.
- Data from all these different sources were available and ensured for this study.

In relation to the trustworthiness of constructivist research, Schwandt (1994) claims that it is based on functional fit. In other words, how does the inquiry and its results allow one to achieve goals and how do the findings fit into a given context or discourse? As offered by Guba and Lincoln (1994), the following are the criteria by which constructivism was examined:

- "fit" – do findings resonate with what is known?
- "work" -- does what we have enhance cumulative knowledge?
- "relevance" – can we apply findings in modern organisations?; and
- "modifiability" – can new data change constructs?

Indeed, based on the ideas of Merriam (2002), Robson (2002) and Mantere (2008), a number of strategies exist to ensure quality of constructivist research. These include the following:

- member validation;
- can another researcher confirm findings independently following researcher's thinking?
- using independent scholar to authenticate the work;
- triangulation of data viz. sources and methods
- self- reflection as a researcher;
- raise alternative explanations throughout the process by peer reviews;
- using thick, rich descriptions that enable the reader to judge whether the methods used and conclusions drawn by the inquirer are justifiable; and
- entrusting to fair dealings or representing multiple views and fairness in the research.

5.7.1.2. Transferability

According to Lincoln and Guba (1985), the ability to transfer the research findings of an inquiry can apply beyond the bounds of the project, and the extent to which findings are applicable to other contexts or other participants is called transferability. Thomas and Magilvy (2011) concur with this view. To this end, the idea of transferability rests on whether some similarity can be found in other

research contexts (Eriksson & Kovalainen, 2008). In particular, because it is the researcher who decides what is more important and what is less important in the data research, findings are shaped by their assumptions and experiences (Thomas, 2003). Hence, different researchers are also likely to yield findings that are dissimilar and not necessarily transferable. Notwithstanding this, the supposition is that similar work can be transposed to other organisations and areas beyond the boundaries of this study.

To address transferability in this study, the researcher provided enough detail about the context of the research so that the reader can judge the applicability of the findings to other known contexts. Also, to ensure transferability all parts connected to the research process were documented.

5.7.1.3. Dependability

According to Lincoln and Guba, dependability is an assessment of the quality of the integrated processes of data collection, data analysis and theory generation. Developing this view further, Thomas and Magilvy (2011) maintain that dependability is established when the same conclusions are arrived at by another researcher analysing the raw data. Physical evidence of the research process was ensured by the researcher. All the relevant documents containing data, research methods and decisions made during the research process, and why they were made, were kept safe. The following were clearly stated: the purpose of the study and the research methods used, and how the participants were chosen, and why, to ensure that the study is dependable. Ericksson and Kovalainen (2008) say that to be dependable the research process must be well documented, logical and traceable. The triangulated approach also ensured a sound data collection research process.

To ensure dependability of the results, the next process was done during the data coding of the data. In order to minimise coder bias and to ensure that a quality process was achieved on the data analysis, the data were analysed by a qualitative coding process, while using a co-coder.To ensure that the quality of the outcome in terms of the data, analysis and interpretation met required standards as required for this study, all these steps were taken.

5.7.1.4. Confirmability

Confirmability, as a measure, attempts to answer the question: how well are the outcomes of the research supported by the data collected (Lincoln & Guba, 1985), and can the research findings by confirmed? According to Marshal and Rossman (2011), confirmability refers to whether the results of the research can be confirmed independently by another person, and to the freedom from bias in the research procedure and results. In other words, it is about the extent to which the findings of the study are shaped by the respondents and not by researcher bias or interest. In fact, it is an indication

of the degree of neutrality of the researcher (Thomas & Magilvy, 2011). A chain of evidence showing that the research has not been influenced by bias must be evident. According to Eriksson and Kovalainen (2008), the data and their interpretation must be connected in a way that can be easily understood. An independent logical analysis should be made from an audit trail of the data collected. Throughout the research process a focus on validity and reliability has been sustained which has enhanced the ability of this study to deliver credible results and insight into the area of focus.

The above explains the actions performed to ensure that the research delivered credible results and could be used for the purpose of this study. In sum, throughout the research process data quality and validity were a major focus. At appropriate points throughout this study steps were taken to ensure that reliability and validity occur. Methodological coherence was a key focus. For example, prior to entering the field the research question, methodological foundation and method selected were shown throughout the study to be coherent. To answer the research question, the selection of participants as discussed was entirely relevant. Lastly, the section of the concurrent collection of data, and of an appropriate transcription method and data analysis which occurred during the research process were deemed appropriate to answer the research question.

5.8. ETHICAL CONSIDERATIONS

According to De Vos, Delport and Strydom (2011), and Louw and Delport (2006), ethics is seen as a set of moral principles. It refers to the quality of research procedures relating to adherence to legal, professional and social obligations towards the research participants. All the ethical requirements and procedures necessary to ensure ethical accountability were adhered to in the research.

The University of the Witwatersrand Central Ethics Committee granted authority to conduct the study. The following ethical principles were adhered to in order to ensure that the researcher fulfilled the ethical requirements:

- Recognised parameters provided the research boundaries.
- Host business organisations provided approval.
- Recent academic resources were used to analyse and describe the concepts.
- Participants gave informed consent.
- The participants will be informed about the results of the research.

Ethical matters and consideration were embedded in this study. During data collection and analysis the anonymity of the participants and the organisations were ensured. The audio-recorded interviews will be kept under lock and key and will not be used in a public forum.

5.9. CHAPTER SUMMARY

The research methodology which was followed in this study was described in this chapter. The logic that was used to identify the specific research question, the methodological foundation under which the research was conducted, and the selection of the method to select participants were presented in a detailed and sequential discussion of the research process. The chapter explained how data were analysed to address the research question. The research was located within a multiple case-study design. A thematic analysis was selected to analyse data. The chapter looked at aspects of quality, reliability and validity that were employed in the study. And lastly, the ethical considerations relating to the study were presented. The following chapter provides the findings that resulted from this research.

6. RESEARCH FINDINGS

6.1. INTRODUCTION

The purpose of this chapter is to report on the findings of the study as obtained through the process outlined in Chapter 4. The qualitative research methodology, with the use of the electronic qualitative software, NVivo 11, in the case study, was presented. This is congruent with the intention to explore the micro-strategising practices of the differentiated workforce within an enabling and/or organisational social context in the insurance sector. Thus, the strategy implementation practices of the differentiated workforce and the organisational context within which they execute strategy are the units of analysis for this work.

6.2. BACKGROUND TO DATA ANALYSIS

Several lenses were used during the literature review to describe the practices employed during strategy implementation. The gaps were identified and the study was modelled to answer the research questions and to achieve the purpose of this study. The four streams of theory as highlighted in the literature review and how they interact during strategy implementation are described.

The practices are defined and discussed with relevant examples of how, when and where the differentiated workforce implements strategy. The uniqueness of the practices as implemented by the differentiated workforce is described through narratives in order to create a clear understanding of what they mean in the context of strategy implementation. The findings as described in this chapter are derived from the interviews. To validate the point made and to report on the findings and interpretations thereof, some verbatim quotations are provided, but not all quotations are referenced as this would be too cumbersome.

6.2.1. Researcher's codes to analyse themes

The last group of aggregated codes were classified into 18 sub-themes from the four main themes derived from the data. There was general agreement between the researcher and data analysts on the themes.

Clarke and Braun's thematic analysis and Saldana's analysis firmed up the data analysis process. The themes followed the thematic analysis paradigm. The two levels used during the analysis were semantic and latent levels (Braun & Clarke, 2006). While the semantic consideration identifies the surface meanings of the data, in contrast, the latent provides theoretical significance to the themes, its

meaning and implications in the context of the present study Within the interpretivist paradigm, thematic analysis was used to investigate participants' strategy implementation practices and processes fron and within organisational social experience in this exploratory qualitative study.

This study is guided by the research questions and the research objectives and these are discussed in Chapter 1. The purpose of social enquiry is to find a solution to a research problem. In this study the research problem arode from the literature review which indicated that there only a limited number of studies have been conducted on strategy implementation in South Africa. Also, this indicated that there is dearth of research on the practices that are used by the non-managerial professionals in implementation of business strategies. The data demonstrated a situation of cooperation and a sense of joint common purpose between TMT and the differentiated workforce to acieve and realise organisational competitive advantage and performance.

The literature was reviewed from the SAP lens (Jarzabkowski & Whittington, 2012; Whittington, 2006), strategy implementation approach (Weiser, Jarzabkowski & Laamanen, 2020) and the differentiated workforce (Becker et al., 2009; Huselid & Becker, 2011) to explore the micro-strategising practices of the differentiated workforce within the insurance organisational structure. This study uses the integrated conceptual framework that combined the dominant strategic management paradigm and the adaptive learning view to analyse the micro-strategising practices and how these practices could influence strategy implementation in the current study. The two approaches, this research argues, bring together divers views to support more complete understanding of strategy implementation (Weiser et al., 2020). Strategic renewal, and in particular strategy implementation, is the most important strategic change process for an organisation's survival (Floyd & Lane, 2000), and the practices of mid-level actors arguably are the hub of strategic renewal (Nonaka, 1988)

This thesis is focused on adding to the literature where the domains of strategic management, SAP and SHRM research interlink and by contributing to some of the gaps that they have in common, thus answering the call to achieve cumulative knowledge (Floyd et al., 2011). This study offers a holistic view of strategising activities of mid-level actors by bringing together all the constructs from SAP approach such as sensemaking, micro-strategising, tacit knowledge and narratives.

The description of the themes is critical in highlighting the importance of the differentiated workforce activities in influencing strategy implementation and facilitating the operations of the organisation due to their positioning in the organisation. The examination of the strategic practices of the differentiated workforce is still underplayed despite their strategic importance. The more detailed explanations of the themes that follow point to the research questions and academic knowledge development. Each theme is presented and substantiated by verbatim quotes from the data and each

quote acts as evidence to facilitate reliability of interpretation and abstraction of the themes. The four themes present the foundation for interpretation of the qualitative data. According to Miles et al. (2014), these themes form the aggregate assertions to present the main interpretations of the study. An assertion, according to Miles et al. (2014), is an affirmation and emphatic announcement of summative synthesis that is confirmed by data evidence. This contrasts with the proposition that advances a conditional event. The themes are summed up as practices. Practices as identified by Jarzabkowski et al. (2007), become cited through individuals within the organisation. In line with SAP, by doing their mundane daily tasks, practitioners draw upon socially instituted practices and shared understanding that allows certain behaviours in particular contexts.

6.2.2. Description of organisational context

This section provides descriptions of the organisational operations within which the differentiated workforce performs in the insurance industry. The descriptions provide insight into the operational realities and the working environment as was described in Chapter 2. The organisational structure forms the framework that establishes reporting lines and role allocation together with the responsibilities associated with positions. As mentioned previously, the differentiated workforce occupies non-managerial positions and reports to line managers. The differentiated workforce does not have people reporting to them. The opening question of the interview deals with the position of the differentiated workforce in the organisation. In response, many describe themselves as specialists with major responsibilities for the organisation's success. The differentiated workforce practises their strategy implementation work within this organisational context. The rich descriptions given by the participants provide contextual meaning for the highly competitive and regulated environment in which the differentiated workforce works. In response to these challenges, change management programmes were adopted which focused on investing in people and creating an environment that empowers the workforce to perform distinctively and to excel. Also targeted were transforming leadership, culture, and talent capability in order to be agile, commercially savvy, productive and innovative. Cooperation, accountability, empowerment and responsibility describe the climate within these organisations.

Company B started in 1919 in Shanghai, China. Today it is a global insurance organisation which operates in more than 80 countries. The company provides a range of insurance products to support clients in business and life, including general property, life insurance, retirement and financial services through general insurance, life and retirement and investment business units. The business of Company B is conducted by management under the oversight of the Board. Company B's business

strategy is developed and implemented under the leadership and direction of the CEO by its officers and other employees. The company employs 45 000 globally. Company B is listed on the New York Stock Exchange. The balance sheet quality and capital strength of the organisation is demonstrated by over $66 billion (US dollars) in shareholders' equity and liquidity sources of $15 billion as of December 31, 2020. The breadth of loyal customers includes millions of clients and policyholders ranging from multi-national Fortune 500 companies to individuals throughout the world. Company B generate revenues and profitability primarily from insurance premiums, policy fees and income from investments.

Company A is incorporated in the Republic of South Africa and has been listed on the JSE since 1969. Following successive branding and structural changes from Bank of South Africa to Company A in the 1980s, Company A was formed in 2003. Company A offers the following solutions through frontline clusters, Company A Corporate and Investment Banking, Company A Retail and Business Banking, Company A Wealth and Company A Africa Regions:

- A wide range of wholesale and retail banking services,
- A growing insurance, assert management and wealth management offereings.

Primary market of the organisation is South Africa and is continuing to grow into the rest of Africa. The organisation has presence in 5 SADC countries and East Africa and the bank follow a partnership approach with Ebank in West and Central Africa making the bank the largest banking network in Africa in 39 countries. On 30 June, 2020, the organisation had R1,2 trillion total assets; with headline earnings od R2 114 million; had 657 outlets in Africa and 28 697 employees and 7,6 million clients.

6.3. PROFILE OF PARTICIPANTS

The selection of participants has been discussed in section 5.5.5 and the purpose of this section is to present high-level information about the participants in order that they are illuminated for the reader. Of the sixteen participants, nine were female and seven were male. This is in line with the transformation goals of these organisations. The average age of the participants was 35 with the range being 24 to 60. The demographical information of participants is depicted in Table 6.1: their gender, age and race, position when the interview was conducted are given. Participants cover a range of key disciplines within the insurance industry. Several primary documents such as the transcribed interviews, organisational information and field notes were imported into the NVivo programme to manage the information.

Table 6.1: The participant number and corresponding demographical information for the case study

Name	Gender	Position	Education	Age	Race	Financial company
Participant 1	Female	Key Account Manager	Certificates	60	White	Company A
Participant 2	Male	Product Manager	BSc (Hon) Act Sc	30	White	Company A
Participant 3	Male	Corporate Actuary	BSc Actuarial Science	40	White	Company A
Participant 4	Female	Product Manager	BCom	35	Indian	Company A
Participant 5	Male	Head: Alternative Distribution	BSc Eng.	38	Black	Company A
Participant 6	Male	Risk Control Consultant	BCom Hons -Int Audit	24	Black	Company B
Participant 7	Male	Financial Analyst	BCom Hons	27	Black	Company B
Participant 8	Male	Actuarial Scientist	BSc Actuarial Sc	32	Black	Company B
Participant 9	Female	Claims Adjuster	Certificates	32	Black	Company B
Participant 10	Female	Product Developer	BCom Finance	27	Black	Company B
Participant 11	Female	HR Consultant	BA	28	Black	Company B
Participant 12	Female	Client Experience	Matric	42	White	Company B
Participant 13	Female	Risk Analyst	BA Hons	32	Black	Company B
Participant 14	Male	Programme Developer	BSc Hons in IT	35	Indian	Company A

Participant 15	Female	HR Consultant	Certificates	40	Indian	Company A
Participant 16	Female	Business Operations	B. Ed	48	Indian	Company A

Source: Own compilation

6.3.1 Contribution of each participant in the study

Table 6.2 presents how each participant contributed to the research study. The column of quotations reflects the number of quotations/references stemming from each participant.

Table 6.2: Contributions of each participant in the study

Name	Number of Quotations
Participant 1	78
Participant 2	33
Participant 3	48
Participant 4	144
Participant 5	89
Participant 6	131
Participant 7	72
Participant 8	86
Participant 9	79
Participant 10	20
Participant 11	123
Participant 12	34
Participant 13	39
Participant 14	79
Participant 15	73
Participant 16	96

Source: Own compilation

Table 6.2 indicates the number of quotations extracted from each participant. From the information provided by the participants, 144 quotations were retrieved from Participant 4, 131 references retrieved from Participant 6, and 123 quotations provided by Participant 11. It is therefore clear that Participants 4, 6 and 11 provided more insight than any other participants in the research study. This is because they are all key players in in the insurance companies they are affiliated with. One can also note that Participant 1, Participant 5, Participant 7, Participant 8, Participant 9, Participant 14, Participant 15 and Participant 16 respectively contributed more insight to the study, plus their quotations are above 70. From the information provided in Table 1, the following participants had the least impact in the study: Participant 2(33 quotations), Participant 3(48 quotations), Participant 10 (20 quotations), Participant 12 (34 quotations), and Participant 13 (39 quotations).

Table 6.3: A summary of the main themes of the differentiated workforce of the study

Main Themes	**Number of Quotations**
Strategic roles of differentiated workforce	51
Materiality of strategy work	126
Enablers of strategy work	115
Constraints of strategy work	53

Source: own compilation

6.4. THEME 1: STRATEGIC ROLES OF THE DIFFERENTIATED WORKFORCE

It is important to note that the differentiated workforce contributes 80% of the organisational output and signifies a group of players whose role in strategy implementation practice and process is still not understood to a significant extent (Welch, 2005). The information provided by the research participants depicts their importance and the roles they play in strategic process. The information generated through the data analysis contends that strategic actions are difficult to implement and that the differentiated workforce through their daily activities at lower organisational levels are mainly the contributors to the success of the strategic process. Participants highlighted a number of issues identified by the differentiated workforce with regard to strategy implementation work, as shall be explained below. The four main themes of the study are presented in Table 6.4.

Table 6.4: The four main themes of the study and sub-themes of the study

Theme 1 **Strategic roles**	• Facilitate adaptability • Implementing strategy • Synthesising information • Championing alternatives
Theme 2 **Materiality of strategy work**	• Communicative practices • Strategic management tools
Theme 3 **Enablers of strategy**	• Organisational culture • Appointments • Compliance • Monetary incentives • Training • Use of IT software
Theme 4 **Constraints of strategy work**	• Role conflict • Lack of skills-set • Under resources • Lack of strategy direction • Organisational culture • Communication

Table 6.5: A summary of strategic roles of the in the current study

Strategic role	**Description**
Implement strategy	The implementing strategy role allows the differentiated workforce practices that agrees with TMT intentions
Champion Alternatives	This role provides the differentiated workforce the ability to influence TMT strategic thinking by giving different views to current strategy notion
Synthesise information	This role refers to the differentiated workforce communicating and interpreting information upwards and downwards
Facilitate adaptability	The role gives the differentiated workforce to support and create a safe working environment for the organisation

Table 6.6: Number of quotes per strategic role in the study

Strategic Roles	Number of quotes per theme
Synthesising information	24
Managing insurance portfolio	9
Implementing strategy	16
Facilitating adaptability	46

It is noteworthy that the practices that differentiate workforce participation are symbiotic in nature with the roles that they fulfil in their insurance companies. Participants emphasised that strategic roles are normally shaped by the organisational setting that forces them to fulfil implementation roles and to carry out strategic roles. Through the analysis, participants mentioned four categories of roles namely: synthesising information, facilitating adaptability, implementing strategy, as well as championing alternatives.

6.4.1. Implementing strategy

It is clear from the interviews that the most common strategic role of the differentiated workforce in the two organisations was to implement business strategies formulated by top management. Two codes, compliance to strategic objectives, and translating organisational strategy into action and individual objectives were used to compile the implementing strategy role.

Table 6.7: A summary of the codes used in analysing the implementing strategy role

Sub-codes or micro-practices	Description
Compliance	Adhering to organisational plans set by TMT
Translation of institutional strategy	Base and foundation of organisational objectives

6.4.1.1. Compliance

In this study compliance can be seen as following rules and the instructions given, and adhering to objectives and goals. Information provided by the research participants highlights that the most strategic role of the differentiated workforce in the two insurance companies interviewed is to implement strategies. From the analysis, Participant 11 argues that:

> *Yeah, so my role is very much the implementation of the legislation because we are bound by a lot of legislation and rules and everyone doesn't kind of see how that fits into the day to day because you see insurance as a very black and white thing. So, by implementation we are trying to help people understand.*

Reinforcing the above statement, is Participant 13 who contends that: “So I'm a program manager, I've managed the project managers and my main strategic role is to implement the organisational strategy with the help of the HR people”. Interestingly, participants provided different categories of the roles they play as implementers of organisational strategy.

Participants in the research study also highlight that implementation of strategy in the two insurance companies can be achieved through compliance to strategic objectives. They argue that employees, even if they are not interested in the strategy at work, are encouraged to comply in a way that helps the organisation to achieve its objectives. Participants state that at times the employees are not in agreement with the strategic objective(s) being proposed but they have to comply. Participant 5 explains their role in strategy implementation by indicating that:

> *So in terms of strategy, what we normally try to align to is keeping our sort of risk appetite in terms of these exposures in terms of legislation requirements, making sure that compliance and as well as our participants are compliant and also those need to be done in a way that it still helps us to achieve our objectives as an entity even if employees are not in line with that. There is no option.*

Reinforcing the above information on compliance to strategic objectives, Participant 11 contends that: "here at Company B it is a top-down approach in terms of the management style of leadership and it is decided from the top hence us we have to just show compliance in implementing the strategic objectives". From the information provided by the participants, most argue that when it comes to implementation, often the differentiated workforce does not have a choice but to implement for the betterment of the company. Participant 9 concludes by stating that: "we at times do not have a say or choice in the implementation, all what we do is basically to assist management in terms of compliance whilst they try to achieve those objectives".

6.4.1.2. Translation of institutional strategy

The foundation of organisational plans and objectives lies in the institutional strategy report. With regard to the translation of the organisational strategy, most of the employees who took part in the study provided information on how they interpret their organisation's objectives. Most of the participants describe the workshops and meetings where the goals and strategies are planned and where managers make sure that matters are aligned according to the strategic objectives. For example, Participant 12 asserts that:

> *So we do all of those checks prior to the project actually going down through meetings or workshops, so there's levels of approval before the project starts to kick off and know if it's aligned to the strategic goals, but you know, this shape, this project in terms of visit actually make financial sense a viable product offering.*

This was supported by Participant 13 who states that:

> *The top, yes plans. Our manager is responsible for the execution but that you cannot execute in isolation. So, the manager even consults myself and my colleague who are program managers to the team consultants and says, guys, you've got these tasks, these assignments. Our responsibility comes in by bringing our project management skills to say whether the skills align to the strategic objectives of the company.*

In short, these participants describe their planning process and strategic session to achieve their strategic objectives.

6.4.1.3. Comment on the strategy implementation role

The researcher agrees with the findings of many scholars (such as Martell et al., 1996; Rousseau & Rousseau, 2000; Raps, 2004; Michlitsch, 2000; Merill, 1997, Becker et al., 2001; Mantere, 2008) that strategy is best realised through high performing people. People, in particular the key workforce in

strategic roles, are process owners and accountable to customers and suppliers for the operational processes they own. It seems that the differentiated workforce at the two organisations understand their responsibilities and functions as these relate to their respective organisational goals and their roles as executors of the company goals.

6.4.2. Synthesise information

The synthesising information role allows the differentiated workforce to channel and interpret information upwards and downwards within the organisation. Thus synthesised information can become the basis for decision making. Participants were asked how they decided which information was relevant for distribution and to give example of how they passed on information from TMT to their subordinates. Participants were also asked to give examples of reporting to TMT and how TMT would respond to information provided by the participants. Three codes were used during the analysis process: reporting on prudential and market conduct, answering queries, and valuation of financial reporting. Table 6.8 depicts a summary of the codes used during the analysis process.

Table 6. 8: A summary of the codes used in analysing the synthesising information role

Sub-codes or micro- practices	**Description**
Reporting on prudential and market conduct	Interpreting and communicating
Answering queries	Responding to questions about policies from clients

From the data analysis process, the role of synthesising information empowers the differentiated workforce to direct information in a top-down scenario and thence interpret the information. According to the participants, synthesising information is the core of the decision-making processes of the organisation. Most of the participants who participated in the study highlight how they usually convey their messages to all levels in their insurance organisations and how they evaluate the relevance on the information provided. Most of the participants mention the use of reports and queries as part of their communicative interactions between the differentiated employees and the clients if need be.

6.4.2.1. Reporting on prudential and market conduct

Participant 2 provides a detailed description of reporting regular financial information and market intelligence to TMT to bring issues to management's attention:

We also report on the prudential and the market conduct from a business perspective. By prudential I mean any form of financial metrics, such as how we're doing in terms of premiums, claims, profit and market conduct tends to be in high literature of your clients, both of those are elicit in a legislation but that also makes sense in a business perspective.

Confirming the above information is Participant 5 who indicates that reports are also used as a communicative interaction tool by the employees. The participant states that:

So, currently, there's been a restructure and at the moment we currently rely on reports to inform the CRO (Chief Risk Officer) which is under the enterprise risk management, which reports directly to the global level. So, our reporting lines do not necessarily go directly to our MD (Managing Director) in Company B, South Africa at the moment, so it basically helps in terms of the independence, and flow of communication.

From the information provided, it is clear that the nature of the reports differ from one insurance company to the other though they all agree that the reports are there to channel information to top management.

6.4.2.2. Answering queries

Participants also acknowledge that directing information upwards is not done through writing of reports only but through answering queries and verbal reporting communication through workshops. Participant 15 emphasises that:

We sometimes communicate through meetings where one has to attend workshops that you have to plan or report that you have to interactions with, your colleagues every to come up with something. So basically, it will be about what is it that you are doing daily, because some of the things we take for granted that, I mean, it's a mundane thing are the things that we do to execute the strategy of the organisation.

With regards to verbal reporting, Participant 2 mentions that:

We have sessions also to report on the prudential and the market conduct from a business perspective. By prudential I mean any form of financial metrics, such as how we're doing in terms of premiums, claims, profit and market conduct tends to be in high literature of your clients, both of those are elicit in a legislation but that also makes sense in a business perspective. Broadly I look at my role in terms of pricing, prudential and market conduct.

6.4.2.3. Comment on synthesise information role

Based on the analysis of the descriptions by the participants, the researcher observed that sense-making was commonly used to interpret and to communicate information from TMT. Based on the descriptions given by the participants, TMT expected the differentiated workforce to provide input and give feedback, and were empowered to do this. The differentiated workforce was expected to channel information about markets and internal challenges through regular reports and other tools. The differentiated workforce consists of specialist professionals with experience and skills.

6.4.3. Facilitating adaptability

Data shows that facilitating adaptability is regarded as a strategic role by the participants in the study, and indeed, as discussed in Chapter 2, the environment in which the insurance industry functions is characterised by complex and rapid change which makes adaptability a key issue. In order to do judge how the workforce fosters adaptability, one can observe the ways in which they support activities within their teams. The participants were asked to give examples of how they changed activities or behaviour to deal with changing conditions. They were asked to describe how such situations were engendered, and how decisions were communicated. Codes used during the analysis process were: problem solving, providing support, creating recommendations and opportunities, and downward influence. Table 6.9 gives a summary of the codes utilised during the analysis process.

Table 6.9: A summary of the codes used in analysing the facilitate adaptability role

Sub-codes or micro- practices	**Description**
Problem solving	Misfit between operational relations and company expectations
Provide support	Help people deals with stressful situations
Downward role	Empowering employees to execute tasks in a safe environment

One observation by the researcher pertained to the fact that participants were always rushing from meeting to meeting, and this appeared to be normal, everyday behaviour. In the reflective journal the researcher put the question: how do these people cope with this situation? HR professionals perform a host of functions to create a safe workspace.

According to the information provided influence is delegated by superiors in a top-down hierarchical structure where they support certain activities within the team. Participants interviewed in the research mention different ways they facilitate adaptability in their organisations.

6.4.3.1. Problem solving

With regards to problem solving, some of the participants explain that there are actions which might have affected their operations if the problems had not been dealt with professionally. Participant 10 asserts that:

> *I mean having been here for such a long time, you learn to stand up for the organisation and find your way. So, you make friends, your network grow but at times you find people who's got this wrong information that might affect the objectives of the department leading to the company as a whole and then you find your way and try to change their mind-sets and convince them that this is not right. I have solved problems such as that so quite some time.*

From the information provided by Participant 10, it is clear that the problem-solving role is a result of the conflict between roles, knowledge, perceptions and attitudes of the employees in the organisation.

Reinforcing the above statement, Participant 7 states that, in their insurance company, time is spent on problem solving whether with clients or within the company. The participant emphasises that the demand for problem solving is linked with the changes happening in the growing multinational organisation, and not in South Africa only. Participants from company B mentioned that they were making sure that employees are well-informed on what is happening within the organisation. Participant 14 supports the above information by stating that:

> *You are constantly reminding the staff of succession plans, talent management or performance management plans, new insurance policies and terms, and implementation of new strategies and also to translate the requirements of more senior management into actionable tasks for my team and the broader business where necessary.*

6.4.3.2. Provide support

From the analysis, there were many descriptions of participants providing support or helping people survive in the organisation as another way of facilitating adaptability within their organisations. Providing support to employees in order to help them survive in traumatic circumstances forms part of what Huy (2001) calls the therapist role. The author contends that the role requires a conscious effort to solve interpersonal and intrapersonal problems within the organisational environment for employees to adapt and deal with their traumatic situations.

Participant 1 reinforces the above information by reiterating that:

> *Through compliance of the needs of the company, the people who do home owners insurance do a lot of things, and if they run into trouble, they would come to me and ask for advice. I tell them that they need to understand that we're an appendix, the bank is here to do finance and it is important to ensure that they receive sufficient support as some are extremely stressed.*

Reinforcing the above quote, Participant 14 asserts that: "anyway, I am grateful that Company B is offering support. When one is depressed, the company makes sure that you are treated, and through HR people the company respond to you by offering you support. So, we look after each other".

This also supports the idea that Participant 11 conveys when they say:

> *I play different roles in the organisation, manager, legislation manager and mentor as I take time to organise workshops for creating safe space for the employees". Participant 15 support the above information by saying, "My manager told me that I need to support the other manager in the process for them to cope with the insurance [work] pressures.*

6.4.3.3. Downward role

Downward influence is another role to facilitate adaptability highlighted by the participants in the study. Most of the participants emphasise that downward influence is the ability of the differentiated workforce to be able to engage "subordinates" and other employees in knowledge building. Participant 8 mentions that managers stamp their authority over them by asking them to:

> *Form the auto team, then we have the auto team that just deals with brokers, so I was going to be in that space and then they asked me to do the direct line because the guy who was there was leaving and was told finding somebody it was going to take a little bit of time and was supposed to take over.*

Participant 10 supports the former participant by stating that, "our managers engage us in the strategising meetings to hear what we think, and we report to them after…" It is important to note that the downward influence on the differentiated workforce helps in achieving the strategic objectives of their respective organisations.

6.4.3.4. Comment on facilitating adaptability role

Based on the researcher's impressions of the organisational context, the working environment is a "pressure cooker". People are always in meetings discussing new products to be developed, looking

at how the products are doing in the competitive market, or looking at customer relations and new channels to improve customer interface, as well as other important business matters that impact on the sustainability and performance of the business. This description, based on the researcher's analysis, seems to support the findings of Mantere and Vaara (2008) that to facilitate adaptability has the potential to enable the strategic agency of practitioners. In this dynamic and changing environment a participative approach to strategy implementation is enabled by trust and empowerment of the differentiated workforce by TMT. By virtue of their background and knowledge, the differentiated workforce assumes the team leader role and often acts as role models to other team members.

6.4.4. Champion alternatives

Table 6.10 presents a summary of the code used during the analysis process.

Table 6.10: A summary of the codes used in analysing the championing alternative's role

Sub-code or micro-practice	**Description**
Managing short-term insurance portfolio	It basically means being responsible for the success of the business operations

The code used during the analysis process was managing the short-term insurance portfolio. This role gives the differentiated workforce the potential to reshape the strategic direction of TMT by selling strategic initiatives that diverge from their conception of strategy. Participants were asked how they brought issues to management and to provide descriptions of their attempts to influence TMT. Participant 5 outlines a scenario where new products were making a loss due to an incorrect assessment of the environment. On learning of this, management was receptive to views that were presented by the differentiated workforce. But on the whole, the hierarchical structure and the culture of these organisations could be a barrier to championing alternatives. The responses on this theme were the lowest, compared to other themes.

The findings here concur with Mantere's (2005) work that concludes that the championing alternative's role is defined by the statutes and governance structures of organisations and is not merely a role. The evidence suggested that the workforce was empowered to take initiatives and to present alternatives to TMT and their views were accepted.

Comments on the strategic roles

In this section, the strategic roles of the differentiated workforce within the insurance industry were presented. Within the insurance and banking industry in South Africa, the traditional middle managers' position has been drastically diminished and this has elevated the responsibilities of the key professionals. In particular, considering the contemporary organisational structure the mid-level professionals are much closer to strategy work in the delayered and flatter organisation. In line with the SAP approach, strategists consist of a much broader group of actors, and increasingly SAP studies show the significance of lower-level employees as strategic actors. The workforce in these organisations were empowered to perform and to excel. The workforce has to do their strategy implementation work and strategy is achieved through their daily mundane activities of organisational life. The impression that I had of the operational realities of these organisations could be described as always on the run to meet a deadline characterised by hyperactivity. In sum, the differentiated workforce implements strategies developed by the TMT. TMT also facilitates adaptability in helping the workforce cope in a stressful business context. Similarly, by interpreting and communicating information, the differentiated workforce is a major source of information by virtue of their experience and specialist professional high-level skills. It can be concluded that the differentiated workforce is a significant strategic resource, given its key role in the organisation.

6.5. THEME 2: MATERIALITY OF STRATEGY IMPLEMENTATION WORK

Researchers agree that strategy implementation relies on the ways in which the material aspects of strategy-making are arranged (Dameron et al., 2015; Le & Spee, 2015). Materiality has been neglected in the strategy field, despite its importance in organisational activity. This research contributes to an understanding of the role of materiality and how it is utilised to develop strategy work. Documents, devices, mobile phones, emails, zoom, meetings, workshops, buildings, office furniture, and Powerpoint are examples of materiality. For the purpose of this study, materiality is coded into tools and communication.

Echoing the above, the second theme mentioned by the participants who took part in the research study was on the materiality of strategy work**.** From the information provided by the participants, strategy implementation depends on how the material aspects of the strategy are organised. It is also vital to note that the materials, according to the participants, range from emails, telephones, documents, and reports among others. From the analysis, the differentiated workforce highlights the main forms of communications they use in their organisations whether with their superiors or

subordinates. To accomplish strategy work, many descriptions of using these tools were provided as indicated in Table 6.11 and Table 6.12 gives a summary of the number of quotes across the materiality of strategy implementation work.

Table 6.11: A summary of the codes used to analyse materiality of strategy implementation

Codes	**Description**
Communicative practices	Official communication in text and talk such as meetings, reports, email communication between TMT and the rest of the workforce
Strategic management tools	Tools are techniques, methods, frameworks, approaches and methodologies that are used to support strategic decision- making within the organisation

Table 6.12: Number of quotes across materiality of strategy implementation work

Materiality of strategy work	Number of quotes
Communicative practices	48
Strategic management tool	61

6.5.1. Communicative practices

Table 6.13 presents a summary of codes used during the analysis process.

Table 6.13: A summary of the codes used to analyse communicative practices

Sub-codes or micro- practices	**Description**
Electronic communication	Electronic communication channel most commonly used to do strategy work
Face to face communication	This role provides the differentiated workforce the ability to influence TMT strategic thinking by giving different views to current strategy notion
Telephonic communication	This role refers to the differentiated workforce communicating and interpreting information upwards and downwards

References dealing with official communication by participants are classified under this code, and they include email, telephone and face-to-face communication. In a hierarchical structure, top-down communication is the norm. The differentiated workforce reports being asked for inputs on business operations and products, and their inputs are incorporated into the strategy work of the TMT. During the interviews, the descriptions were in response to questions dealing with the information flow between the differentiated workforce, TMT and the rest of the organisation. The questions asked for descriptions of reports to TMT and how issues are brought to their attention. Also, questions dealt

with how the differentiated workforce influences their peers in strategy implementation, and how ideas from their juniors are included into their strategy work.

6.5.1.1. Email

It is clear from the information provided that email is the most commonly used communication channel in both organisations. Participant 1 asserts: “let me put it this way, I do ask questions when I meet you. However, we live in an era where everything should be formalised in a form of emails. So, we communicate through emails for future back up of information as well”.

Participant 10 confirms the above information by stating that, “emails, I usually email the head of HR or something like that. No, I think it’s better to use emails. It would hold more water if you earned it yourself”. Supporting the above notion is Participant 12 who indicates that, “well, lots of emails. Lots of emails that comes from news from America or structures or what but not internal newsletters…”. Reinforcing the notion of using emails as a communicative tool, some of the participants indicate that they do not just send the emails, but they try to interpret them before sending them. Participant 13 submits that: “I don’t pass on the email as it is, but I pre-empt it with my own interpretation to make it easier for the next person reading it”.

Participant 3 indicates that: “our effective mode of communication is the email, so firstly I don't just forward, I interpret emails. So, certainly we interpret and make our points, make sure the team it has to be relevant to them and say this is relevant for the business”.

Concluding the issue of emails as a communicative strategy, Participant 4 asserts that they do not just use emails to inform or send messages about the business but also to motivate and encourage employees in achieving organisational strategies. Some of the participants point out that reading emails takes most of their time, and some emails get lost in the many emails that are in their inboxes. Also, the fact that one is “forced to check on their email even when one is on leave. So, the frequent use of emails might also affect the flow of the strategic objective as people might not be on the same page with regards to the information shared”, noted Participant 8.

6.5.1.2. Telephone

Some of the participants report on the use of telephones as a communicative strategy. Participant 11 indicates that: “there's WebEx you can see each other. There's telephonic interview. Sometimes you actually set up telephone interviews for financial manager in Egypt. So, they will be speaking in Arabic. So, with us telephonic interview is more convenient”.

Supporting the above information, Participant 2 agrees that: “I’d say there’s probably three ways we communicate with my manager as he is not based in Johannesburg but Durban, so we communicate electronically or via the telephone”.

6.5.1.3. Face to face communication

Some of the participants in the study emphasised the impact brought about by face to face communication. Participant 13 indicates how the team plans and deals with client problems that are very regular in their work:

> *We meet often as a team, we meet on a weekly basis. We sit close to each other and we meet on a monthly basis with management, religiously. So, we talk about it. So, I favour the face to face communication, and we know we had the meeting and when is the next, those are the key points, x, y, z to be dealt with. I'll be sending a mail that summarises everything for the meeting. And then matters are dealt with. So that's how we generally go through problems, and that is how my team operates.*

The participant highlights the importance of having a face to face conversation where people speak “cross- functionally” to each other whether this be with clients or the managers or general employees.

Participant 11 confirms the use of face to face as a communicative strategy in their insurance organisation when she explains that:

> *We communicate it clearly through verbal communication. We have a monthly session it's called a town hall session. Everybody in the business gathers around and there's people that are presenting different projects and that's the entire business and by virtue of that process. They communicate the strategic goals on a monthly basis.*

Participant 14 says that face to face communication enables them to be open to managers when discussing strategic issues around the growth of the company. They mention that:

> *My manager and I have very frank discussions. Sitting and talking to him when he is in the office is when I talk to him about everything. I would consider this in terms of my direct reports. I would influence them by communicating what we do and how we do it, I get feedback in terms of the way forward as well.*

Some of the participants emphasised that face to face interaction helps individuals discuss key agenda items, and that follow ups are usually done through emails and meetings. Informal networks in these organisations were not the channels of choice.

6.5.1.4. Understanding communicative practices

The inputs from the differentiated workforce were sought by the TMT because of their specialist skills and knowledge. For instance, certain information in terms of the information data could only be certified by the differentiated workforce. The view of Mantere (2008) on the enabling effect of the TMT response to the differentiated workforce input is confirmed. Based on the descriptions given by the participants, the information provided by the differentiated workforce is critical for the success of the TMT. The climate that that was prevalent within these organisations were characterised by mutual respect which facilitated cooperation and interdependence between management and the rest of the workforce. According to Mantere (2008), the mutual respect between TMT and the differentiated workforce is reached through an exchange where the TMT shows respect for the expertise of the mid-level managers and in return, middle management appreciate TMT strategy work. The whole system seemed to be cohesive and working in tandem.

6.5.2. Strategic management tools

In this study, tools were described as methods, models, frameworks and approaches to support strategic decision-making. Tools used by the participants in strategy implementation are described in response to the research question, "Can you describe or give examples of some of the tools you use in doing strategy? Table 6.14 presents a summary of codes used during the analysis process.

Table 6.14: A summary of the codes used to analyse strategic management tools

Sub-codes or micro- practices	Description
Project committee meetings	Communication using formal channels to carry out tasks with formal reports and formal text.
Workshops and forums	Using formal meetings with experts on matters that need special attention to do strategy work.
Policies	Standard procedures that guide activities and decision making in the organisation.
Report writing	Formal textual communication used to provide information to TMT.

6.5.2.1. Project Meetings

Meetings are also part of the artefacts used by both insurance companies to accomplish strategy work. In these meetings, minutes are recorded for easy referencing as indicated by most of the participants. Participant 12 reports the frustration of the staff when meetings are held but matters are not attended to:

I have a meeting every month, I can show you minutes, but I feel like those things aren't real, data showed is not real. The same issues we've been discussing month after month with no change and sometimes I feel we are sabotaging the strategy work by not doing anything when we know we are the rightful people who have the knowhow through our daily routine jobs.

Participant 16 reinforced the above idea by stating that:

At times I may refer matters to my senior as well just for an opinion and they're stuck and remain unresolved, and I don't know what to do. So yes, we have meetings as well, we do benchmarks and best practices as an organisation to check the best performance within the industry with drawings, charts and graphs to make it more visible, and we do that particularly and normally it's within the complaints division. And the info, that's available to everyone very soon to see how we perform against our competitors.

It is important to note that the information provided by some of the participants indicates that the most common form of formal talk is through meetings at different levels. Interestingly, the informal communication was not a common structure within these organisations. Only two participants mentioned using informal networks to interact with others.

6.5.2.2. Policies

From the analysis, policies were also reported as operating tools that are used in the two organisations to guide decision making with regard to strategy and, to some extent, employees' behaviour.
Participant 11 indicates that:

Oh, we have many policies, Company B has so many policies, like you cannot believe. Everything is a written in the policy. People know that there are consequences. There are consequences for the actions taken by the staff. And the managers constantly remind us of the new policies and their implementation to foster strategy work.

Supporting the information, is Participant 7, who points out that, "our internal policies are even more onerous…". Also, Participant 5 indicates that, "the policies I mean they almost guide the day to day activities of whatever procedures".

Contrary to Participant 11, Participant 14 asserts that:

I am the custodian of policies. I have to make sure that we abide by the policies. I have to make sure that from a recruitment point of view, we follow all that needs to be done. We also need to abide by the employment equity. As a start we have to ensure that we are employing

accordingly, but this is very difficult to make everyone adhere [to AA targets]. As of last week, we have been informed about the FSB Regulatory mandates with additional targets with the financial sector that we have to comply with. We do have targets. At the junior management levels we are lagging behind being at 40%, 20% and 30%, depending on the particular level. For the whole organisation we are about 80%. Well, it depends, we have a lot to do on professional levels to correct the imbalance. Funny enough, we were trying to do something right.

The participant is concerned by the lack of vision despite having many policies that are supposed to be guiding them in strategic work instead, "they are not doing anything in that capacity". Reinforcing the above information, Participant 7 mentions the lack of vision in one insurance company through the delay in policy formulation.

6.5.2.3. Report writing

Data drawn from the participants stressed the issues of report writing as a textual communication that differentiated workforce normally uses on a daily basis with their superiors. Some of the participants highlight that they spend much of their time writing reports on what is taking place in the company, whether with clients or with the business. Participant 11 states that:

We write reports directly to our bosses into that office Dubai, companies at some point we're cutting down the levels, we were saying we're not actually going back but for you guys. But for me it's full circle. It's very interesting but nevertheless they're still writing and reporting it.

On the other hand, all issues that have to do with clients are reported in writing. Participant 6 explains that:

We've already got the paperwork that says this is the expectation of what you should have in place and soon you can report on it. So, all complaints older than five days, that hasn't been finalised will go into the public domain. And then yes, it will definitely have benchmarking against other insurers. In other stuff like customer centricity, which is voice of customer. We do surveys, there's something.

One participant reinforced the above information by stating: "then when we communicate by reports to top management, they are the ones who decide which information is relevant".

Participant 15 asserts that at times management has certain expectations of the report that you need to send. She says:

And we give examples of what they report, you send to management. So, if it's a project of this few things, you report to the project, some indicators reporting on the progress of projects. You had a budget of the project milestones which is against the objectives, so every time when we report we always link it up to strategic goal objective.

Some participants suggest that the type of reports they usually submit to management has to address four aspects, which includes what have you done, what went wrong, what you have achieved, and what can be done to attain the strategic goal". Other participants emphasise that for the differentiated workforce who are managers or supervisors in their departments, report writing requires "taking information from others and consultation to be able to prepare a good report" as explained by Participant 1. Reinforcing the above information, one participant asserts: "oh it's a very high-level report writing. I have a one on one with my boss every second week and then I shared that report with what I'm doing in terms all of the details". The use of newsletters is not very common in these organisations. This could be owing to the use of electronic communication and the fact that organisations support green initiatives.

6.5.2.4. Workshops

From the data analysis, some of the participants indicate that they do conduct workshops as a way of communicating their strategy work. One of the participants (Participant 1) mentions that:

We're running a workshop with the team last week we are running a workshop with the team next week. So, it's about saying that we can't do what we've always done because we're not going to get a different result. Right? What got us here? If you listen to a goldsmith, it talks about what got you and going to get you there. So, I ran a workshop with the team, and this was about different ways of work. How do we do things differently to get a different result? And it's all about. We spoke about leadership being a change leader, being an execution expert. How did we start to execute quicker, better, faster? We need to start being quick at what we do, and we spoke this about being agile.

6.5.2.5. Comment on strategic management tools

Findings confirm the work of PwC that technology is the integral part of insurance business operations. The use of laptops seems to be the common practice and technology is an integral aspect of business operations. The use of emails was extensive throughout the organisations and served as the main form of communication. The first impression when entering these organisations is their vast open-floor space with cubicles and semi-private working space. The rest of the floor plan consists of

several boardrooms that are always in use. What was clear for the researcher was that the work here is achieved through teams and committees. Committee-based interactions between different operations teams are the routine tasks and operations in these organisations, based on the experiences of the participants. Routine daily tasks and business operations were based on group work and experiences of the employees. The descriptions of their mundane daily activities revolved around developing new products for the markets in terms of developed policies, ensuring that the business channels can facilitate selling, market readiness of products and profits and lastly compliance with the regulatory framework. Common understanding of strategy was facilitated through varied organisational interactions, which were mostly formal. Informal communications were rare, contrary to most research findings.

6.5.3. Understanding the theme of materiality

Shared and common understanding of strategy implementation is facilitated by using many communicative interactions. This section used a socio-materiality lens to report on the differentiated workforce's communicative interactions to achieve strategy implementation. Participants were asked to describe the tools used in their strategy work. Materiality of strategy implementation, that is, communicative practices and strategic tools, are intertwined, linking directly with one another.

6.6. THEME 3: ENABLERS OF STRATEGY WORK

This section explores the differentiated workforce's agency-enabling conditions that allow for the fulfilment of those roles. Enablers can be seen as those conditions or factors that contribute to success. Those conditions and factors are coded as enablers when the participants indicate contentment with the conditions of their work. The use of IT work, organisational culture, appointments, compliance, monetary incentives, and training are the codes used to describe the enablers of strategy work.
Table 6.15 gives a summary of the codes used during the analysis process and table 6.16 provides a summary of the quotes across the enablers of strategy implementation work.

Table 6.15: A summary of the codes used to analyse enablers of strategy implementation

Sub-codes or micro-practices	**Description**
Monetary incentives	Financial rewards and recognition to achieve organisational goals set by TMT.
Compliance	Adhere to regulations and laws governing the industry.
Training	Developing skills and competencies to accomplish strategy work.
Use of IT software	Technology tools used to facilitate strategy work.
Appointments	Appointment criteria and practices to attract skills-set.

The following sections will report on the enablers as described by the participants. The aim is to offer rich descriptions, supported by verbatim quotes of enablers that the differentiated workforce faces in their organisations.

Table 6.16: Number of quotes across enablers of strategy implementation work

Enablers of strategy works	Number of quotes
Organisational culture	14
Appointments	16
Compliance	12
Monetary incentives	16
Training	14
Use of IT software	10

From the data analysis process, participants mentioned enablers of strategy work in their organisation and how these contribute to the strategy objectives of the organisation they are working in. Most participants in the study indicate that enablers are supporting factors that contribute to the implementation success of the strategic vision and its objectives. From the analysis, participants highlight that although the strategy of the organisation can be presented in abstract terms and numbers, strategy is present in the day to day lives of the organisation. Some note that it is a social practice that is embedded in innovation because it is through innovation that companies stay long in business.

6.6.1. Monetary incentives

From the data analysis, participants mention monetary incentives as an enabler of strategy work. Participant 1 says: “so yes, rewards in the form of money and recognition and people will drive the strategy of the organisation without question especially when they are satisfied”. Supporting the above statement, Participant 10 claims that, “incentives push people to work hard in the organisation. Through HR they strive to see that people are satisfied drive the strategy of the organisation forward”. Participant 15 asserts that incentives change employees’ behaviours. The participant claims that:

> *HR must link it up exactly to rewards and recognition. Then it will work. It talks at different levels. We've been focusing on our external service providers, but we'll be going internal, again, at times like you said the HR with monetary reward or the increase of incentives. That is a good change of behaviour.*

Participant 5 indicated that:

> *There is a perception among some of the people that the only reason the strategy of the organisation is being pushed forward is to make sure that they all retain their bonuses, which I totally agree with. In Company B they do pay attention to us when we speak to the HR about recognition if they want the strategy to work.*

6.6.2. Compliance

The participants indicate compliance as another factor that enhances strategy work in insurance companies as demonstrated through the data set. Participants vehemently underline that compliance is a must for any business operating in the South African insurance market as it ensures that professional and legal standards are adhered to and because achieving compliance can be leveraged as a competitive advantage. Participant 12 says:

> *These like new, we add new policy or the protection rules or amendments to the policy on protection rules coming up, guys (teams) are aware. So, compliance (unit) as a whole does the workshop, to take the business through to say this is potential new legislation that we are coming into.*

Confirming the above statement, Participant 5 explains:

> *So we always try to find ways because compliance needs to happen if we need to push our strategy. So, we try to find a way that make it easier. So, it's more like you have to sort of*

compete with your competitors by complying easier, something like that. So, if you made it easier for the participant with something, it makes you more favourable to work with as opposed to your competitors.

Supporting the idea of compliance, Participant 15 asserts that:

I've been doing it in my work. Yes. Because then I mean, that's where you're saying that maybe HR systems should enforce it. That should be for those people whose responsibility is to make sure that there is compliance in the company. And in this company whether you are interested with the strategy being put forward or not, you need to comply [with regulations].

From the analysis, it is clear that the culture of compliance and power within the insurance companies is a top-down objective.

According to the information provided by the participants, many of them feel that they had no part in formulating the objectives and operational plans that lead to strategy work, and that it was merely given to them from the top down. Participant 16 contended that in our case "when it comes to strategy, it is the top management that decides and all we have to do it to implement it". Reinforcing the above information, Participant 13 states that: "we didn't have much of a choice when it comes to strategy work and implementation choices, we just get it and follow what is coming from the top bosses. For us the head office is based in America and they tell us what to do… and we do that".

6.6.3. Training

Training was mentioned by the participants as an enabler of strategy work. Participant 11 points out that:

We are doing the right thing. We do more training. That I have to do internally. We've been focusing on our external service providers, but we'll be going internal, again, at times like you said the HR with monetary reward or withdrawal of incentives. That is a good change of behaviour that is being facilitated through training to push the strategy.

Some of the participants mention how training has helped in the acquisition of knowledge with regards to achieving strategy work in the organisation. Participant 13 confirms the above information by stating that:

We normally do the mentoring, training and the coaching when it comes to knowing the strategy. So, the training programme comes, and each employee must upskilling themselves through the training programme pipeline. Each of my people are brought in and we've got a

training and development plan for each of them so they would attend training of their choice or training that will help them develop in their role and develop in implementing the strategy objectives of the company.

Supporting the above information is Participant 7 who indicates that training is vital in equipping people to understand the strategy. They indicate that:

I know, I know Sasol uses it, we use it. I think a few other big corporates also use the training barret. It is like any seminars. There's a lot of training for professionals, like if you want them to get trained on the Barret to actually interpret. Yeah. Okay. The Barret Survey (Culture Assessment Tool) itself helps in equipping individuals with implementing skills and ideas.

Interestingly, from the information provided, some participants indicate that instead of them being given training everyday on the systems they use in their organisations, they ended up training the management as some would not want to admit on face value that they do not have adequate knowledge. Participant 8 adds that:

I came in for training on the system, surprisingly I was training the manager on the system to say, this is how you do things, you don't do it like that, and this this is how it is done. So instead of me getting training, I was training the manager on the operations of the new system that has been introduced.

A key message that was identified in most of the interviews is that system training is done once and thereafter one has to find ways to use it to accomplish their objectives. Participant 2 asserts that:

We just train you on the system and once you get the system you know how to do your job. No one needs to train you on how to do your job because that is what, you know from technical training, they hired you because they know you can do your job. The only thing you need training on is for you to use it to enhance organisational strategy.

6.6.4. Use of IT software

Use of IT software was indicated as another factor used in insurance companies to push the strategy work on a daily basis. Some of the participants highlight that their work is highly dependent on the use of IT tools. Participant 6 mentions that:

The tools that I use are highly dependent on the IT infrastructure and software. I have weekly catch-up with my team, I have previously been working on a waterfall-based project

management approach, waterfall is very iterative, you can't move to task two without finishing task one.

Supporting the above idea is Participant 1 who also points out that:

In terms of preparing the results, I use a lot of IT software, spreadsheets and we also have the bespoke software. The company's is called FIS (Financial Intermediary Services) they have a piece of software called PROPHET, which is essentially a cash flow projections system, it allows us to do a lot if our calculations in most reliant and governed fashion. In terms of preparing results, to be able to provide explanations and communication, that's the main software we use for our strategies and implementation as well. It is a powerful tool I can admit.

Expanding on the notions above is Participant 7 who asserts that: "there's other systems like SQL, uh, Microsoft SQL is useful. So, in order to manipulate data, you know, install data. Yeah. Those are the tools that we actually use for reserving and strategy implementation most of the times in this company".

It is clear that from the analysis some of the participants emphasise the use of technology and technological tools in their strategy work, as these systems created help them to cope operationally.

6.6.5. Appointments

Interestingly from the data analysis process, participants mentioned the importance of appointments or promotions as another enabler of strategy work in the organisation. Most of the participants associated promotions and the drive that is created to work. Participant 11 asserts:

I'm sitting on various forums, contributes to the strategy objectives of this company and eventually rolls up into the board as well as a market conduct for them that reporting to FCA, formerly known as the FSB (Financial Services Board). And recently, very recently I think within this month I've just been promoted, and this gives me the real energy for me to push for the objectives of this company.

And Participant 13, asserts:

So, for me, making sure that people are promoted and given their right share comes through, and this make people go through a rigorous process of understanding what that idea is so that we can translate it properly, make sure that those goals are clear, achievable. They're not just sky type goals, so that you can really achieve and that will really bring business value.

It is important to note that from the information provided for a business strategy to be implemented, 'happy pockets and happy minds' are key indicators as indicated by the participants.

6.6.6. Organisational culture

There are many constraints and enablers that influence strategy making if the differentiated workforce and the enablers and constraints discussed are specific to the insurance organisational business context. While the enablers contribute to the perceived success of the organisation, the constraints, on their own, do not cause the strategies to fail. Rather, to put strategies into practice the constraints present challenges and difficulties that the differentiated workforce needs to overcome.

Insurance organisations are continuously exposed to intense pressures linked to market forces, customer expectations, globalisation, cost reduction, digitisation and regulatory challenges, among others, and the ability to change constantly has become a competitive advantage (PwC Report, 2018). In accord with this view, the Accenture Report (2018) notes that the turbulent market conditions present opportunities and threats to many current business models. In fact, to survive, organisations have to be agile. My observation is that there are many constraining aspects that the differentiated workforce has to deal with in their work. Evidence from the research indicates that the differentiated workforce is overworked and motivated despite these challenges.

Table 6.17: A summary of the codes used to analyse organisational culture

Sub-codes or micro-oractices	**Description**
Involvement in decision making	Taking part in decision making via inclusive organisational climate.
Regular communication	On-going sharing of information through communicative interactions between TMT and the rest of the organisation.

6.6.6.1. Involvement in decision making

Involvement in decision making is regarded as one of the major enablers of strategy work in these two insurance companies. Most of the participants who took part in the study indicate that involving employees in decision making is vital as people tend to share important ideas which helps to accomplish the strategy work of everyone in the organisation. Participant 3 explains that: "we get together in our weekly meeting to discuss on issues related to the company and our specific areas and how best we can improve. This is productive because everyone contributes". Supporting this idea is Participant 16 who mentions that, "we bring the managers and their subordinates to a big monthly

meeting where we want to just see if we are on the same page and to agree on how things work and how they are progressing in enhancing our strategy work". Participants indicate that involvement and sharing of ideas is important if employees are to achieve their objective strategies, as suggested by Participant 3 who reports that:

> *You take the opportunity to discuss because we have people from all areas of the business in those forums to say, I just want to bring this to your attention. These like new, we add new policy or the protection rules or amendments to the policy on protection rules coming up, guys are aware.*

6.6.6.2. Regular communication

Lastly, participants mention that regular communications is also vital in the implementation of strategy work. Most of the participants point out that, one should not underestimate the importance of communication and the involvement of all staff members to keep the communication going. Participant 5 indicates that: "communication makes a huge difference and helps people to be in touch and have knowledge of what is going on".

In agreement with the above information, Participant 14 reports that: "regular communication helps people to share crucial and relevant issues with regards to implementation of strategy work and inform each other on what is going on with regards to the strategies or policies of the company".

6.6.7. Understanding enablers of strategy work

This study builds on the enabling conditions used by Mantere (2008) in explaining the implementation of role expectations as a structural element; narrative, contextualisation of TMT plans to be implemented, resource allocation changes, and respect. These demonstrate the TMT pledge to plans. A well-defined set of objectives from TMT, according to Chia and Holt (2006), anchors the operations' organisational work, making strategy a tool in daily practical coping. This serves to contextualise TMT's plans that give understanding and focus to the work of the workforce in support of the decisions to be implemented.

Allocation of resources is important to facilitate implementation of strategy. Agents draw upon the organisational structure to invest their actions and power. This view is supported by the literature. The differentiated workforce also has power because of their specialist skills and knowledge (Becker et al., 2009). Giddens' (1084, p. 14) structuration theory that "agency is an exercise of power in that

to be agent is to be able to use variety of causal powers" is relevant here. Power, therefore, is embraced by the view of practical-evaluative agency.

The role of the differentiated workforce is key since they provide the connection between TMT and the rest of the employees in the hierarchical organisation. The differentiated workforce acts as a shield for strategy implementation by supporting and leading team projects and initiatives, and promoting TMT ideas. The differentiated workforce is a synthesiser of information and facilitates adaptability by promoting adaptation to new situations and ongoing flow of information, and by participating in activities. As implementers of strategy the differentiated workforce acts as developers who organise, motivate and adapt to new methods in implementing organisational plans. Trust is an enabling condition for strategy work to be encouraged (Mantere, 2008).

6.7. THEME 4: CONSTRAINTS OF STRATEGY WORK

Constraints of strategy work are described by participants as those factors that limit their work. In these situations, the differentiated workforce is not able to make a difference in an issue they consider significant to organisational success. Role conflict, lack of skills-set, lack of resources, lack of strategy direction, organisational culture, and communication protocol challenges are codes used to describe the constraints of strategy work.

From the analysis, participants describe a list of constraints affecting the differentiated workforce in implementing the strategy work in their organisations. Participants reiterate the incapability of some managers to make a difference in subject matters regarded by them as vital to organisational interests. Participants identify role conflict as a challenge in the implementation of strategy work

Mantere (2005) defines the theme of constraints as defective practice or an absence of something within the organisation. During the interviews, participants show some doubt about the conditions of their strategy agency. Also included in the theme are descriptions of the differentiated workforce's inability to make a difference in the matters they see as significant to the organisation. Table 6.18 summarises the codes used to explain the constraints of participants during their strategy implementation work. Table 6.19 follows with a summary of the number of references during the analysis process.

Table 6.18: A summary of codes used to describe the constraints of strategy implementation

Sub-codes or micro- practices	**Description**
Role conflict	Misunderstanding due to many task allocated and that causes distress that the participants experience.
Lack of skills-set	Hindrance regarding needed skills and formal acquisition of knowledge and competencies that are required to achieve the organisational goals.
Lack of strategic direction	Lack of organisational strategy that informs all company- wide activities and plans.
Communication	Lack of formal channels and regular communication between management and the rest of the organisation.
Organisational culture	Constraints associated with company culture.

Table 6.19: Number of references across constraints of strategy implementation work

Constraints of strategy work	Number of quotes
Role conflict	17
Lack of skills-set	23
Under resourced	9
Lack of strategy direction	16
Organisational culture	12
Communication protocol	7

6.7.1. Role conflict

Role conflict is anxiety experienced by participants as a result of having to fulfil different roles. Within the financial sector, middle management levels have been reduced by changes to organisational restructuring over the past ten years. Most of the traditional middle management responsibilities have been taken over by the differentiated workforce. Adding to the complexity and changing nature of these organisations, descriptions of frustrations and the issues that the differentiated workforce faces within operational realities are likely to increase.

Some of the participants highlight that there is a certain level of uneasiness that is experienced by participants which is connected to the need to accomplish different roles. Participant 9 explains: “I do not have time to focus on my duties as I am also expected to lead the complaints department where I have to deal with clients. This affects me but I have no option as this is also important”.

Echoing the above information is Participant 2 who asserts that:

I wish we had more time for more creative work in this organisation. There is a lot one is expected to do and they [TMT] at times keep moving us around and giving more roles to perform and resulting in confusion of not knowing which I should accomplish first, and yeah that is it in my company.

Through the analysis, role conflict is regarded as an inhibiting agent in implementing strategy as the differentiated workforce gets confused at times on what to achieve within a limited time frame. Participant 2 asserts that:

A lot of conflict within my role has come from the fact that I'm relatively young and this position has tended to require at least 5-10 years working experience and a similar role didn't exist in the industry before. The previous person who held this position did not have the required skills, from an insurance perspective, to build a report to the board of directors.

Supporting the above information is Participant 8 who mentions that: "there is a lot of animosity and those people had to move out of these roles. So, there was a lot of conflict there and it's quite difficult dealing with all that".

6.7.2. Lack of a skills set

Lack of a skills set was regarded as a major challenge faced by the differentiated workforce in trying to accomplish strategy work in their organisations. From the information provided by Participant 1, it is reported that:

It has occupied the bulk of our time because remember in order for the other areas of insurance job, they need the proper skill set. We had to fill in those roles to ensure that certain strategic objectives are driven in those areas. So even though recruitment is a very operational thing, it actually formed part of the strategic plan. Of course. Yeah. But there is still this lack of skills-set in our companies.

In support of the above information, Participant 10 mentions that: "there is a lack of skills in our insurance companies, people do not have the knowledge to drive the strategy work and it is a problem as some people are just not putting much effort".

Substantiating the above information is Participant 3, who points out that:

Whilst there's a lot of new people, most who are brought into this culture automatically, for people that have been here for a while, it becomes very frustrating because they are used to

doing things but it is not coming out as you end up doing their jobs and you realise this experience thing doesn't work when you do not know the simple terms and concepts important here.

Emphasising the issues of lack of skills, Participant 15 indicates that:

I mean like technologies flying. We are way behind and most of us we don't have the ability to use them, so like the basics and that's my frustration when I came in here. We have a broker business, a brokerage, we have a direct business that's alternative channels through call centres and we have the bank business, so if you look at the broker business, they didn't have the processes, etc. There is technology disability especially with the guys who have been here for a very long time.

6.7.3. Lack of strategic direction

Data shows that lack of strategic direction is another challenge facing the differentiated workforce in the insurance organisations as highlighted by the participants who took part in the study. Participants 7 points out how frustrated he is because of a lack of strategic direction shown by the senior employees. He notes that:

It's also frustrating when you have been working on a silo and suddenly have to be a team member, because you have to educate them, and it becomes very infuriating sometimes. One of our issues is that most of our work, especially VAPs is all outsourced and the people there have no idea of what I do and what I even want them to do. So everything just becomes frustrating.

Reinforcing the above information, is Participant 11, who indicates that:

Oh, we have many policies, this insurance company has so many policies, like you cannot believe everything is a policy. People just don't follow or respect because there's no consequences. There's no consequences for the action. I sometimes when I look at it, then I think they have a lack of passion for what they do. It's just what the company to just work, but there is no real connection and there is no strategic direction when you really look at it. They don't have a real connection to the company.

From the information provided by the participants, there seems to be no problem with the differentiated workforce when it comes to strategy implementation, but the executives of the company are a problem. Participant 6 notes that: "I think my team is very aligned to our goals, my issue is that

I think there is a lack of strategic direction that's being set at the executive level". This resonates with the information mentioned by Participant 2 who reiterates that, "there's a huge amount of lack of direction, uncertainty and confusion, in terms of what our strategy is as a bank insurer. But my direct goals, which are very project based are easily measurable and fully aligned to my teams' goals".

It is important to note that some participants think there's a broader strategic misalignment in the company because "there's no detailed documentation defining that we're the insurer of choice for a Company A client. But I haven't seen a clear strategy on how to achieve that" reports Participant 9.

6.7.4. Communication

Communication practices are described as constraints by some of the participants. Participants mention communication protocol challenges as inhibitors of strategy work as experienced by the differentiated workforce. Participant 14 asserts that:

> *The manager had a problem communicating with people. He is always a loner, so to speak, always prefers to work by himself. And your culture says working teams, but besides that, the way in which you communicated to people, it was like he was always an abrasive, defensive, angry. He was angry about something and it affected everything in the department.*

Participant 3 also supports the notion of challenges resulting from poor communication strategies. They indicates that:

> *There isn't much protocol around communication, at least not within the insurance division. One needs to make sure that they have explained the results. There's a requirement to submit with the relevant governance protocols, for example, what is our current reality in terms of lapse experience is a result of poor communication.*

Participants indicate that the lack of good communication protocols in the company affects everything done in terms of strategy implementation.

6.7.5. Organisational culture

Usually organisational culture is referred to as "the way we do things around here". As this research looks at the strategy implementation work of the differentiated workforce, organisational culture is the focus of the research. References by the participants refer to the norms, beliefs and rules classified as organisational culture code. From the analysis, participants highlight that failure to integrate organisational culture is a major constraint faced by the differentiated workforce in the insurance organisations. Participant 15 reports that:

> *We have realised as an organisation that we really have a poor culture. We do not have the culture that encourages people to think. And we have shared all of this with our leadership and our leadership is now on a journey to make this possible. One of our six transformational priorities identified is people and culture and a lot more. A lot of time this year was allocated to these projects. Well, I say the last 8 months of this year has been spent building people and culture, and unfortunately, we are not yet embracing it, and this is costing us as an organisation.*

Participant 1 also asserted that, "the culture across units is not that centralised yet".

Explaining further on the above information is Participant 14 who states that:

> *We want to make a difference and that's where we are on the culture journey now is to say how do we change the culture of Company A insurance? Many of the executives were oblivious and not sure of what they were doing. They were not even aware of the impact of that behaviour on the people in the business. So, you know the story of unconsciously, unskilled. I don't know what I don't know… the culture has to change and then strategy implementation will be easier because we will be on the same page.*

Supporting the notion above is Participant 6, who indicates that:

> *I've kind of familiarised myself with that culture, right? Even the strategy that is kind of a kind of a current currently unfolding at the top-level management because they are kind of confused. This is so because people are not aware of the culture, it not centralised as yet.*

Participants comment on how poor organisational culture affects the entire organisation. Participant 9 points out that management does not appear to be interested and to acknowledge the presence of the employees:

> *That's inhumane. It wasn't happening yet but a good example of poor organisational culture is when, one, executive come to work and never greets people. I mean people below yes, we would greet each other, but our leaders, would walk in and walk right past and not even greet you. And then when you greet them, say good morning, they will just give you a look and walk away. Well that's acknowledgement. Okay. So, when you talked about culture, your culture, well I'm in that small example of that is it's a bottom up approach to say, how can we change? The overall culture is a challenge here.*

6.7.6. Lack of resources

Operation-specific issues such as problems due to lack of capacity occur because systems or other resources are lacking. Lack of resources is highlighted as a factor affecting strategy implementation by participants. Participant 13 mentions that: "because we outsource almost everything from claims, admin and sales perspective outside of Company A, because we don't have the system or infrastructure internally".

From the information provided, lack or shortage of resources is a big challenge in implementing strategy as companies are losing money through outsourcing and this affects the employees. Supporting the above information, Participant 7 argues that, "Unfortunately, we're under resourced and everything seems to take long before it flourishes. It's not comfortable but it has to be done". Putting much emphasis on the issue of resources is Participant 2, who points out that:

> *I need resources; we're very under resourced, in terms of building these dashboards and maintaining them, there's huge resource intensity, you need a lot of staff, you need dedicated resources especially that we're building these resources from scratch and we do not have that. Yet you are expected to achieve your objectives at the end of the year*.

From the information provided by the participants, the mentioned factors are inhibitors of strategy implementation in their organisations and they need to be looked at with urgency for the organisation to achieve their goals.

6.7.7. Understanding constraints of strategy implementation

The nature of the insurance industry is competitive. Furthermore, the daily operations of the differentiated workforce and their responsibilities are influenced by the ongoing restructuring of the sector. The middle management levels are being eroded and this work has been taken over by the differentiated workforce. Although the environment is in a state of flux, the differentiated workforce has learned to adjust. Within the context of an insurance organisation, strategy implementation is key to organisational performance (Noble, 1999). Importantly, implementation is far from being straightforward and is linked to strategy formulation. But for implementation to occur, TMT must review organisational plans regularly to keep pace with change. By looking at the differentiated workforce, this study provides a different perspective on strategy implementation. Importantly, this study indicated that there was generally a sense of interdependence and cooperation between TMT and the differentiated workforce in acieving the organisational strategy.

Strategy implementation of the differentiated workforce is influenced by many enablers and constraints. These enablers and constraints are specific to the organisational context within which the research participants put their strategies into practice. While the constraints present challenges that the differentiated workforce needs to address for strategies to be achieved, the enablers, on the other hand, contribute to the success of strategy implementation.

6.8. CHAPTER CONCLUSION

This chapter reported on the findings from the thematic analysis that was done on strategy practices and processes implemented by the differentiated workforce within the insurance industry in South Africa. In order to have a rich database that could be analysed, data were obtained from these two organisations through interviews and documents. In line with the SAP approach, this chapter stated the messy realities of the strategy work of the differentiated workforce and confirmed that strategising within the insurance industry is not only limited to management. Furthermore, the chapter reported the actual micro-processes of the differentiated workforce's strategy work. The insurance industry faces major challenges and fast changes, and the differentiated workforce, as a pivotal workforce, splay a major role in the competitiveness of the sector.

The data was organised, categorised, interpreted and synthesised and the information was gathered as indicated above. Through inductive coding the quotations identified from the text were coded and grouped into categories until a logical theme was formed. This was then utilised as a basis from where the discussion for the analysis was concluded. Concluding with a description and illustration of the practices and processes employed during strategy implementation as derived from the data collected, some interpretation of what was found in the results was provided. Overall, theories on micro-strategising are derived from these rich descriptions and indeed connect the strategic roles of the differentiated workforce with the practices enacted within those roles and the materiality to accomplish strategy work. In conclusion, there is a discussion on the limitations of the results, as well as a proposal for future research and summary.

7. INTERPRETATION, RESEARCH CONCLUSION, CONTRIBUTION, RECOMMENDATIONS FOR FUTURE RESEARCH, AND LIMITATIONS

7.1. INTRODUCTION

The present study sets out to develop the body of knowledge around the practices of the differentiated workforce in strategy implementation, and contributes to the knowledge field by focusing on pivotal and key employees in the insurance industry in South Africa.

According to the existing literature in the field of strategic management, implementation of strategies is a neglected area and therefore requires investigation (BAM, 2013; Candido & Santos, 2015; Fourie, 2007; Olden & Fixen, 2014; Smith, 2011). In addition, the actual day to day practice of "doing" strategy during implementation, and the tools in use for this purpose are not well documented in the literature (Davis, 2013; Feldman & Orlikowski, 2011; Janse van Rensburg, 2016; Vaara & Whittington, 2012). The purpose of this study is to determine what strategy practitioners, that is, the differentiated workforce, are doing to execute strategy, and what practices are being utilised in the implementation of business strategies. The answers to the research questions are discussed in this chapter, based on the findings from this research. The theoretical lenses that are used to interrogate the research topic are the SAP perspective, strategy implementation theoretical view, and the differentiated workforce approach. The purpose of this chapter is to interpret the findings and to connect these to the literature and theory. In this research the aim is to understand the strategy implementation practices employed by the differentiated workforce during strategy implementation work in the insurance industry in South Africa. The examination of the strategic practices of the differentiated workdorce has been overlooked within strategic management despite previous research that has indicated that organisational performance is heavily influenced by what happens in the middle of the organisation, rather than at the top. This body of research is is inspired by the work of Floyd and Wooldridge. The conclusions drawn from both the inductive and deductive approaches as well as the new theoretical contributions are presented. Also, this chapter makes recommendations for future research and outlines the limitations of the study.

7.2. GENERAL SUMMARY

The aim is to describe the final output of this study and to summarise the major discussion undertaken thus far. It includes the gaps identified in the current literature, the contribution made in this regard, and, also, the process followed during the study. The detail of the process will be explained thereafter.

The flow of how the study evolved is conceptualised, emanating from the research question and culminating with the theoretical perspective on strategy implementation practices and processes.

Firstly, to ensure that all the necessary areas are covered in the study, a theoretical perspective was presented during the literature review. The researcher synthesised the literature into discrete knowledge areas and identified expected outcomes and contributions to existing literature. Second, the literature indicated where gaps exist so that these could be addressed by the current research project. Streams of theory were then identified and assessed to ensure that this treatise contributes to the current body of knowledge as identified by the research objectives. In line with the purpose of the study, of specific interest was the way in which each participant's practices was developed. Added to this framework were the SAP approach, the role of the differentiated workforce, materiality of strategy execution work, and barriers and enablers relevant to strategy implementation. Third, to ensure that the needed output related to the theoretical approach defined above, the next step was to design the research so as to obtain as much information as possible. The research methodology and design served as the blueprint as well as the process that was followed during the research. It demonstrated the instruments used to collect data, the sources of information used during data collection, how data was prepared, and what analyses were performed. In order to arrive at consistent and valid data and reliable outputs, the output from the analyses as well as controls that were built into the design were described. Fourth, the output produced from the study and the data from the research in terms of the practices and processes, represent the conclusions arrived at from the research. Lastly, all the content, practices, processes and context of the study are captured in a theoretical conceptualisation. This conceptual view defines the integrated view of how the results of the research produced a new perspective on strategy implementation used by the differentiated workforce in the insurance industry business environment in South Africa. By identifying the 'what' and 'how' of strategy implementation practices and processes the conceptual view successfully answers the research question.

In this research the aim is to understand the practices employed by the differentiated workforce during the strategy implementation work in the insurance industry in South Africa. Strategic management literature still considers strategy as a top-down process of formulation distinct from implementation, predisposing a focus upon top managers and middle managers (Hambrick & Mason, 1984; Davis, 2013; Janse van Rensburg, 2016; Wooldridge et al., 2008). The body of research on middle managers and lower levels is inspired by the work of Floyd and Wooldridge (Floyd & Wooldridge, 1992, 1994, 1996, 2000, 2003; Floyd & Lane, 2000; Wooldridge & Floyd, 1989, 1990; Wooldridge et al., 2008). Wooldridge and Floyd (1990) postulate that in professional service organisations the influence of non-managerial professionals, that is the differentiated workforce on strategy is even greater. Despite

this observation the research on non-managerial professionals has been neglected despite previous research that has demonstrated that organisational performance is heavily influenced by what happens in the middle of the organisation (Burgelman, 1983; Currie & Procter, 2005; Dutton et al., 2001; Floyd & Lane, 2000; Huy, 2001; Nonaka, 1988, Westly, 1990). Equally, the literature has in strategic terms underplayed the role of middle managers until relatively recently (Mantere, 2008; Rouleau & Balogun, 2011). More importantly, considering the current organisational structure, the middle management, and the non-managerial professionals in particular, is now at the hub of strategic apex in the delayered and flatted knowledge organisation. In general, though, despite so many calls for understanding the role of non-managerial workforce in strategy work, the focus of the literature has remained with the TMT.

7.2.1. Main research question

Primarily, the main research question of this study is what practices are employed by the differentiated workforce in general, and in selected strategic jobs in particular, towards strategy implementation in the insurance business context? A detailed comprehensive literature review on strategising practices, the differentiated workforce and strategy implementation was conducted in Chapters 2, 3 and 4, and the background to the insurance business environment was provided. The findings in Chapter 6 report on the insurance organisational context as was explained and described by the participants. Furthermore, the strategy implementation practices of the differentiated workforce are also described.

All the sub-questions relate to the practices of the differentiated workforce in the context of the insurance industry in South Africa. The first sub-question of this study relates to the strategic roles which were deduced from the typology developed by Floyd and his associates (1992, 1994). The second sub-question asks how the differentiated workforce engages with the materiality of strategy implementation work, and the findings reported on communication and tools of the strategy implementation work. The third sub-question asks about the enablers of the strategy implementation work and reports on the findings. The last sub-question asks about the constraints of strategy implementation work in the organisations under investigation, and these are reported in the findings.

7.2.2. Response to the research questions

It is important to relate the research questions back to the initial questions that were asked as a first-order conclusion and to establish whether these questions were satisfactorily answered. The summary as found during the research as well as the rest of the research questions are contained in this chapter. To define strategy implementation practices and processes as executed by the differentiated

workforce is the outcome of the study. A presentation of the practices and processes by the practitioners in implementing and doing their strategies is a contribution of this research, thereby attaining the objective of the research. Lastly, there is a discussion on the limitations of the results, as well as a suggestion for future research.

To further refine the central research question of this study we ask what strategy implementation practices of the differentiated workforce have arisen from the interaction between these key and pivotal non-managerial employees (and management) in a rapidly changing insurance business context. It is important to highlight Chapter 6 which reports on the insurance business context as described by the 16 participants. Perhaps it should be reiterated that since the 2008 global financial crisis the African insurance industry has been in a state of continuous disruption.

Several SAP scholars call for further research on what strategists do (Jarzabkowski et al., 2007; Jarzabkowski & Whittington, 2008; Jarzabkowski & Spee, 2009). By exploring individuals within their immediate locales as they do strategy implementation work, this study attempts to answer this call. In line with the call by Feldman and Orlikowski (2011), this research identifies the enabling and constraining conditions that impact on the strategy-making and implementation practices of the differentiated workforce. To summarise, the current research not only provides insight into the strategy implementation practices of the differentiated workforce, importantly, it also makes a contribution to the development of theory on the conditions that enable and constrain the strategy implementation practices and processes of the differentiated workforce within the insurance industry. This study has led to an understanding of those detailed micro practices and processes that constitute strategy implementation, specifically in the insurance industry in South Africa. Even though strategy involves change, this research focuses on how strategy is created and implemented, and not on how organisations change.

Strategy research studies have noted strategy implementation as a critical area of inquiry. Studies representing the learning and adaptive turn have portrayed strategy implementation as a process that is prone to unintended consequences (Balogun & Johnson, 2004, 2005; Huy et al., 2014; Sonenshein, 2010). The term “unintended consequences” means that outcomes should conform to the intended strategy and if they do not, then the implementation process is where strategy is changed and rerouted. According to many experts (such as Chakavarthy & Doz, 1992; Huff & Reger, 1987; Mintzberd & Waters, 1985), the idea of unintended consequences of strategy implementation conforms to the outdated duality view of formulation and implementation.

The argument that this thesis puts forward is the integrative perspective that presents a more dynamic understanding of strategy implementation that unfolds though the interplay of conceptualising and enacting strategy. The integrated view puts this interplay at the core of strategy implementation rather

than evaluating the quality of implementation based on the extent to which strategies have been appropriately executed according to a predetermined plan. The SAP scholarship which continues to expand argues that strategies are enacted within the discursive, interpretative and emotional practices of the diverse actors who implement strategies (Balogun et al., 2014). Based on this argument, this study has shown that strategy implementation is a process of enactment brought about by discourses (Mantere & Vaara, 2008; Mirabeau & Miguire, 2014; Sonenshein, 2010), interpretations (Balogun & Johnson, 2004; Rerup & Feldman, 2011), and emotional reactions (Huy et al. 2014) of the implementers who shape the strategy that is realised. In fact, SAP research has demonstrated that the specific tasks performed by people with different functional expertise and organisational roles shape the way strategic change unfolds (Balogun et al., 2015; Jay et al., 2019). The findings answered calls in the literature for more understanding and for broadening the range of organisational actors involved in strategy implementation (Mantere, 2008; Mantere & Vaara, 2008; Vaara & Whittington, 2012; Whittington, 2006).

7.3. STRATEGY IMPLEMENTATION PRACTICES OF THE DIFFERENTIATED WORKFORCE IN THE INSURANCE INDUSTRY

Scholars working in the SAP take a more micro and processual approach and stress the interconnections over time in formulation and implementation, and process and content to discern how strategy work is actually done (Jarzabkowski et al. 2007). Research focus is on the micro-activities that form the actual doing of strategy and this research contributes to the literature by opening the black box of the organisation and by humanising strategy research. This study brings together the Mintzbegian concern for unpacking the details of what strategists do with a more explicit practice epistemology, and hence a concern for the embedded nature of human agency (Vaara & Whittington, 2012; Whittington, 2006).

Since this research is based on two case studies of South African insurance organisations, a context for the business climate was presented in Chapter 2 highlighting the major challenges that are confronting the industry. The main challenge is to drive transformation, innovation, agility and change at speed and scale to avoid replicating legacy business models of the past. In several competitive banking markets across the world, organisations that have been able to develop a clear segmentation model, and to differentiate themselves, have achieved business success (Becker et al., 2009; Collings & Mellahi, 2009; Huselid & Becker, 2011). To respond to constantly changing internal and external pressures in today's challenging economy, the HR departments in such organisations need to be more nimble than ever. These pressures challenge their ability to improve workforce

effectiveness, and achieve operational excellence, to capitalise on the growth of emerging markets, and to develop future leaders.

According to Ambrosini et al. (2007), by investigating the dynamics and practices underlying this phenomenon and defining the process that constitutes strategy through this approach, SAP has been concerned with a means to further explore the social complexity and causal ambiguity in the RBV. In line with qualitative research norms, secondary data through annual reports and research reports, augment the primary objective and ensure that rich data verified the outcome of the research. The roles of the differentiated workforce within the business environment were defined during the process of strategy making, and the connection between formulation and implementation was also established. An integrated and consolidated approach of how practices and processes are being applied and identified during the study and how it is aligned with the research question was the output of this research.

From the research four themes were identified, then, from the qualitative analysis codes, were identified as practices, and these serve as the final output of this work. The themes are strategic roles; materiality and tools used in strategy implementation; strategy enablers; and strategy constraints. Jarzabkowski and Spee (2009) address these themes as practice bundles, clearly identifying the requirements and gaps for further research within the field. The outcome of this study is outlined and each of these practices will be discussed in detail in the following sections.

The objective of this research was to identify the practices utilised by the differentiated workforce during strategy implementation within the insurance business environment. These practices were then put into context following the discussion on how they are being utilised and applied in actual context in these organisations. More importantly, the data obtained through the secondary objectives increased the primary objective and ensured that rich data verified the outcome of this work. The outcome of the data contributed to the objectives though the identification of the practices. The implementation process in line with the SAP view was highlighted during the research. The role of the differentiated workforce as strategy practitioners, was defined during the strategy implementation process. Overall, the output of this study was combined into an integrated perspective of how these practices are being applied during the study and aligned with the purpose of the study.

The practices identified in this study from the primary source data was given to indicate patterns that emerged. The themes are summed up as practices following the work of Davis (2013), McEwan (2016) and Janse van Rensburg (2016). This follows Jarzabkowski et al. (2007) that indicate that practices become cited through individuals within an organisation. The responsive activity may be seen as a practice when the answers to the organisation become a sufficiently default position. This

explanation is covered to simplify the presentation of the data as the analysis depicts the themed areas as practices.

From the research four themes are suggested with the categories identified. From the qualitative data analysis the codes were depicted as practices on which this chapter is based. Central to this is that the strategy practices found during strategy implementation were grouped into the themes as presented in Table 6.3. Firstly, the roles of the differentiated workforce as implementation practices and processes; secondly, materiality and tools utilised in strategy implementation work; thirdly to establish the enablers of strategy implementation; and lastly to understand the constraints of strategy implementation. According to Jarzabkowski and Spee (2009). These themes and sub-themes are categorised as "practice bundles". The authors presented these as the requirements and gaps for further research in the SAP field.

The strategic role aspect was then grouped into four categories in line with the theoretical typology of Floyd and Wooldridge (1992). The categories are championing alternatives, facilitating adaptability, synthesising information and implementing deliberate strategy. Materiality used during strategy implementation was grouped into communicative practices and strategic management tools. Furthermore, the third theme was to establish the enablers to strategy implementation and the fourth theme addresses the constraints of strategy implementation as identified during the research.

The above was discussed, analysed and interpreted in detail in Chapter 6 and an attempt will be made to contextualise how this is used in practice within the insurance business environment. The following part of the discussion will explain the ways that the differentiated workforce is doing strategy and implementing strategy in their mundane daily tasks to add to the current SAP literature (Whittington, 2002; Davies, 2013). It is a difficult subject as these practices are intangible and thus not easy to define. However, the outcome of this work is depicted in a way to be able to comprehend what these intangible, social and cognitive practices involve during the strategy implementation process by the differentiated workforce to achieve organisational goals. Firstly, the context in which the practices are used is presented. Secondly, the implementation process of the insurance industry is explained. Thirdly the role of the differentiated workforce was contextualised through the practices found during the research. Lastly, all these are integrated to explain the challenging nature of how practices are applied during strategy implementation by the differentiated workforce.

7.3.1. Practice in context

The organisational context and general management processes were described in Chapters 2 and 6. An integrated conceptual framework on which this study is based was developed and is presented in Chapter 4.

The early traditional strategy research focuses mainly on how to conceptualise strategy implementation plans and how to establish optimal structures, systems, incentives and controls for execution of strategy (Hrebiniak & Joyce, 1984; Nutt, 1989). This is crucial in the establishing and sustaining enablers conducive to strategy implementation that will impact on the practices that relate to effective strategy implementation. Also, this act as an enabler that supports an environment of effectiveness and other factors that facilitate the differentiated workforce's implementation efforts. There are also materiality and tools that are used by the workforce. These differ from management information systems, BCS, implementation tools and others. There are also issues that would hinder the implementation of strategy that form part of this research. Finally, these themes are translated into strategy implementation through sensemaking and sensegiving perspective of the differentiated workforce at the micro-level (Balogun, 2006; Balogun & Johnson, 2005). The SAP turn in strategy implementation has shifted attention on how organisation make sense of and enact strategies in practice. This research investigates the continuous interplay of conceptualising and enacting strategies at multiple hierarchical levels, using the differentiated workforce, in multiple organisational units simultaneously. This culminates in strategy implementation of the TMT plans through joint collaboration of the entire organisational strategists. The latest work of Weiser et al. (2020) supports this integrative view to develop a more complete understanding of the strategy implementation phenomenon, emphasising the complementarities between the traditional and SAP research streams. The themes, in the context of practices, are translated through sense making view to implement strategies.

Mintzberg (1978) seminal work introduced a distinction between realised and intended strategies, defining strategies in terms of discernible patterns in action over time, realised potentially independently from any intent (Mintzberg & Waters, 1985). Realised strategies consists of both emergent and intended components, in which some elements of intended strategy may become unrealised, while others combine with more emergent elements to produce realised strategy. This approach focuses attention on process and 'the how' of strategy, recognising that strategy includes "patterned action that does not originate in the intentions of TMT" (Mirabeau & Maguire, 2014, p. 1204). Importantly, this definition of strategy introduces other practitioners outside TMT into the strategy process and highlights the role of everyday actions in achieving strategy. The findings of the research contribute to developing a greater understanding that realised strategy can be seen as the

daily mundane actions of individuals throughout the organisation, rather than reports developed by TMT (Balogun & Floyd, 2010).

Yet despite its importance to organisations, the research focus on how strategy is realised has been neglected. This thesis responds to renewed calls for scholars to investigate the process by which strategies are realised (Tsoukas, 2010; Vaara & Whittington, 2012). The findings answered the calls in the literature for more understanding of the differentiated workforce's strategic practice by demonstrating where it occurs and stressing the role of contextual and interactional features to find strategic practice, practitioners and their practices in contexts that are easily classified as not strategic. To this end, this thesis has focused on the daily embodied and interactive work of the non-managerial professionals that results into the strategic aims of an organisation to achieve organisational strategy. This research shows and explores how the differentiated workforce contribute to an organisation's realised and implemented strategy.

7.3.2. Strategy implementation process

SAP as a developing research field has been dominated by how strategy is made and constructed rather than strategy implementation (Jarzabkowski & Spee, 2009; Regner, 2003), and this study sheds insight into understanding strategic outcomes (Jarzabkowski et al., 2007).

Building on the work of Weiser et al. (2020), the process of strategy implementation researched combines the structural control approach and the SAP views of strategy implementation. The following three main elements are conceptualisation of strategy, the enacting and doing of strategy and lastly the coordination of strategic action to achieve organisational objectives. To this end, strategy implementation explored during this study is "the continuous interplay of three interrelated activities – conceptualizing, enabling, and coordinating – that enable an organisation to realise strategies through collective actions by organisational stakeholders" (Weiser et al., 2020, p.973). The following are important elements of conceptualisation: a) the creation and implementation of strategy by TMT; b) a wider set of activities and actors that contribute to the outcome. Enacting strategy is seen as a guide of strategy implementation resulting from people's actions over time (Jarzabkowski et al., 2019, Weick, 2001). Importantly, enacting strategy includes the actions of multiple actors and their interactions in making sense of and adjusting a given strategy to their own context. According to Jarzabkowski et al. (2012), coordinating deliberate strategic actions to achieve strategy implementation and the social dynamics through which people work interdependently on objectives and goals, are joint collective action by all stakeholders. On the link between formulation and implementation, it is important to note that these two are interlinked and cannot be separated. They are based on changing circumstances, thus are iterative process not bound to time.

7.3.3. The differentiated workforce in context

Research has increasingly indicated the importance of middle level managers' and mid-level professionals' activities in influencing strategy, and particularly strategic renewal (Floyd & Wooldridge, 2000) which is the most challenging work of strategy implementation. The findings of this research contribute to developing a greater understanding of the impact of the differentiated workforce on strategy implementation within the insurance industry in South Africa. In general, though, the focus in strategic management research has been with TMT despite many calls for more research of middle managers and other practitioners in strategic renewal.

The current study provides understanding and explains how the differentiated workforce contribute to strategy implementation within the insurance industry in South Africa. This study is inspired by the work of Floyd and Wooldridge (1990, 1992, 1994, 2000). They concluded that their findings on middle managers could apply to professionals in non-management positions. Furthermore, they proposed that the influence of non-managerial professionals could be greater in professional organisations like the insurance industry. Also, modern organisations have become flatter and less hierarchical, thus increasing the role of the differentiated workforce. In this sense, they are the practitioners with the knowledge and experience to implement organisational strategies. The differentiated workforce has a close line of sight to the customers and the business operations. These are critical to the success of the insurance business, as was highlighted in section 2.2. In this context, TMT provides business guidance and oversight while the differentiated workforce must implement at all levels of operations and align with the TMT's organisational direction. This is achieved by mediating between the various local change narratives of different practitioners which are guided by different team-specific, relational and interpretive contexts (Balogun et al., 2015). Many actors engage in a sensemaking process to bridge the actors' multiple prevailing meanings and new meanings related by the proposed strategy (Spee & Jarzabkowski, 2017). As indicated in the practices during the study, the differentiated workforce report both upwards and downwards as part of their implementation responsibilities as indicated by Floyd and Wooldridge (1992).

7.3.4. Coordination and integration of practices in strategy implementation

Given the socially created nature of strategy, how are different actors in diverse multiple levels of an organisation coordinate into cohesive pattern of action? Strategic integration is accomplished through political interactions in which practitioners mediate their given positions in strategy implementation (Balogun et al., 2011). The role of coordination is to ensure legitimacy of participants across all levels (Jarzabkowski et al., 2020), and shared agreement on strategy and the strategy implementation plan

(Spee & Jarzabkowski, 2017). This study puts forward an argument that strategy implementation that unfolds through the interplay of conceptualising and enacting strategy is at the heart of strategy implementation. With its emphasis on social construction, these findings also contribute to the literature of the learning and adaptive turn in strategy implementation by stressing the process of enacting strategy in which a formal strategy by the TMT, no matter how carefully articulated, is always shaped and influences by the "doings and sayings" (Schatzki, 2001) of those who implement it. Similarly, the findings contribute to the literature as we can see the role of practices in action, organisational arrangements of the roles of the differentiated workforce, and the structural mechanisms involved in coordinating business strategy (Floyd & Lane, 2000; Floyd & Wooldridge, 2000; Jarzabkowski et al., 2012; Mantere, 2008).

The findings of this study are consistent with the growing understanding that middle managers and key professionals influence strategy and champion new initiatives (Bulgelman, 1983; Mintzberg & Waters, 1985). The work of Schilit (1987), Kanter (1983), Floyd and Wooldridge (1990) show that the differentiated workforce is more likely to be successful in influencing TMT during strategy implementation. According to Nonaka (1994), the differentiated workforce is the strategic hub of change as they are in the middle of horizontal and vertical information flow. Accordingly, the differentiated workforce merge strategic, macro, universal information and hands-on, micro, specific information and therefore bridge the gap between the TMT's vision and the reality of the business (Nonaka, 1994). Findings in this study confirmed the view of Raes et al., (2011) that TMT and the middle level practitioners, that is the differentiated workforce, rely on each other's relational and evaluating roles and related behaviour for successful strategic formulation and implementation. The differentiated workforce is valued for their information as a foundation for strategy making and they have knowledge of who to talk to and how (Floyd & Wooldridge, 1997). Westley's (1990) and Rouleau's (2005) research supported the view that the energy for strategic actions by the differentiated workforce is based in strategic communication. According to Shaw (2002), narrative sensemaking is a paradoxical, iterative, non-linear movement during which interpretations of the past influences the future by interpreting the past in the interactive future. The differentiated workforce uses sensemaking and sensegiving at a practical and social level through their conversations (Le Baun & Whittington, cited in Brelsford 2014).

7.4. ROLES OF THE DIFFERENTIATED WORKFORCE IN STRATEGY IMPLEMENTATION

Traditionally, organisations engage in a yearly formal strategic planning process. As pointed out by Mantere (2008), this formal planning cycle assigns different strategy roles to organisational members.

The researcher was able to consider the differentiated workforce's behaviour within these different roles from the depth of information provided by the participants. In line with the SAP perspective, this study has begun to see organisations as pluralistic settings that are characterised by diffuse power and by the divergent interests of different organisational members (Jarzabkowski & Spee, 2017). More importantly, the authors argue that to form a common account, diverse actors need to engage in sensemaking process that bridges those actors many prevailing meanings and the new meanings covered by the proposed strategy. As a result, the role of TMT is to mediate between the various local narratives of different actors, which are influenced by different team-specific, relational and interpretive contexts (Balogun et al., 2015). Viewing strategy implementation from this approach has made it necessary to broaden the range of actors considered in strategy implementation work and to reassess the roles of top and middle management. This research has evidenced that the interface between top and middle management and the differentiated workforce play an important role in strategy implementation research, especially on the dynamic interplay across the different levels (Hayden et al., 2017), and on real opportunities for joint sensemaking, ie., the construction of meaning of others towards a preferred redefinition of organisational reality and to mould the way members give meaning to changes (Gioia & Chittipeddi, 1991). Therefore, this thesis contributes to the literature on the criticality of the differentiated workforce to delivering and initiating strategies that contribute to strategy implementation work.

The findings of this study resonate with the findings of prior research within strategic management by several scholars (e.g., Govindarajan, 1989; Bracker et al., 1988; Floyd & Wooldridge, 1992) where the researchers found that the quality of people (skills, education and experience) involved in strategy implementation impacts on organisational outcomes. In particular, side factors involving people were identified as more significant than organisational and systems factors. By exploring the strategic roles of the differentiated workforce this study responds to calls for strategy to be decentralised from the perspective of the upper echelon. Also, the idea of strategy as a dynamic process of intertwined and non-hierarchical activities is supported by the findings of this research (Burgelman, 2002; Floyd & Lane, 2000; Wooldridge & Floyd, 1990). The findings of this study have led to a detailed, clearer and more nuanced account of the origins of strategic ideas, how they come about and are legitimised, and how the differentiated workforce through their interactions contributes to strategy implementation activities. Burgermans' (1996) study of Intel on the roles of the engineers in the company's exit from memory-chip manufacturing is a case in point, emphasising the roles of the differentiated workforce in the emergent strategy (Mintzberg, 1983). An earlier similar study by Litterer et al. (1985) found that product engineers' decisions were significant in defining market success and innovation. This research is in accord with the conclusion of Wooldridge and Floyd (1990) that many of their findings

in studies involving middle managers could also apply to non-management. The authors advocate that the influence of non- managerial professionals, that is the differentiated workforce, is even greater in professional services organisations such as legal firms, R&D institutions and financial/ insurance organisations.

Findings from the present study corroborate other findings that the differentiated workforce in the insurance business fulfils the same strategic roles as those identified in the Floyd and Lane (1990) typology (Ezzamel & Willmott, 2008; Jarzabkowski et al., 2013; Mantere, 2008; Mantere & Vaara, 2008; Rouleau, 2008; Stieger et al., 2012). According to Davis (2013), even though the foundations of these roles are the same, owing to the unique organisational context, the nuances within each role are slightly different.

In line with the limited extant literature, the current research confirms that the differentiated workforce plays a significant role in helping others cope within the context in which they operate (Briggs, 2005; Chia & Holt, 2006; Huy, 2001). The results of the current study confirm the understanding that not only does the differentiated workforce support their peers, but that they seem to provide support to other employees as well. Such support is carried out formally through training and workshops for team members, or through one-on-one therapy sessions. This support is also in some cases given to their managers. As specialists in critical fields within the organisation, the differentiated workforce also sometimes performs legal, regulated, and specialised functions because of their professions e.g. actuaries, legal experts and risk analysts, among others.

Research findings also indicate that a great deal of problem solving, which forms part of the role of facilitating adaptability, takes place within the strategic roles of the differentiated workforce. This is in accord with the research of Davis (2013) with middle managers at a South African institution. These findings are in line with the views of Huy (2001, 2002) who states that middle managers facilitate smooth implementation by attending to subordinates' negative emotions regarding operational realities. The description given by participants 1, 11, 14 and 15 as reported in section 6.4.3.2 confirmed the view of Huy (2002) who stated that the differentiated workforce facilitates strategy implementation by attending to subordinates' negative emotions regarding operational realities. Linking to the role of emotions in strategy implementation, the workforce's emotional commitment to change initiatives and focus on employees' emotions supported organisational adaptation is evident in this research. The lack of support could have resulted in organisational inertia (Huy, 2002). The failure of Nokia to implement strategy was influenced by an asymmetry of fear between TMT and middle management.

In addition, the empirical evidence shows that the differentiated workforce plays a key active role in evaluating and interpreting information. In many cases the precursor to championing alternative strategy is the synthesising of information. The finding that there is little responsiveness from TMT to the synthesised information they receive from middle managers, contradicts the findings of Davis (2013). As a regulatory requirement, the differentiated workforce needs to certify financial reporting.

As product developers, the differentiated workforce, as indicated by the research findings, actively champions alternatives at the operational level. This research has uncovered the differentiated workforce's endeavour to champion important matters and communicate important issues regarding the health of the business to management. Participant 5 could be categorised as strategic champion as described by Mantere (2005). The participant described a situation where new products were unprofitable due to incorrect market assessment. The findings are in accord with the view of Caldwell (2003) who argues that as the roles of the middle managers continue to evolve as organisations find themselves in a state of continuous change, thus creating less hierarchical and flat organisations, the role of the differentiated workforce become prominent. By virtue of being professional specialists, some of the participants described how they influence strategic issues as part of their primary operational responsibilities. Not only were they involved in management committees, but they assisted in shaping new strategic ideas from the top. These findings are consistent with previous research of Accenture and PwC Reports that were discussed earlier. This had the least responses, where the differentiated workforce alerted TMT to areas of improvement (Mantere, 2005, 2008).

The traditional position of TMT as the drivers of company strategy is in harmony with the dominant strategic management paradigm (Clegg et al., 2011). In contrast, the SAP approach posits that the differentiated workforce as key strategic employees have an important role to play in strategy making in any organisation. However, the dominant approach is still very influential within the field (McEwan, 2016).

In addition, the empirical evidence demonstrates the synthesising information role through an abundance of regular reports from the differentiated workforce to TMT and to other team members in the company. Within this synthesising information role, the differentiated workforce, in line with the extant literature, would either pass information as it is or rephrase it through a process of sense making and sense giving (Balogun et al., 2003). As reported by participants, through these processes, the differentiated workforce creates order and reconstructs information. These processes may lead to either a more clearly defined objective or message or a different objective or message within the operational realities of the companies (Davis 2013). Davis further states that this sense giving and sense making, together with the differentiated workforce's tacit knowledge, create meaningful

messages within the unique organisational context (Wooldridge & Floyd, 1990; Floyd & Wooldridge, 1994). Particularly in this context, characterised by rapid change, some sense of direction is needed to keep the morale and energy of the organisation high, and sensemaking and sensegiving become important as an ongoing process. This is in line with the findings of Gioia and Chittipeddi (1991). The results of the study further confirm the views of Balogun and Johnson (2004) and Balogun et al. (2005) that the differentiated workforce experiments as they continually make sense of the strategic information they encounter, and develop informal, lateral peer support networks.

The findings in this study evidenced that the workforce drew on their skills, experience and background to inform their sensemaking. This would suggest strategic initiatives within an organisation start with sensemaking interaction with the external environment. This is in line with views that change occurs at the periphery of a system (Regner, 2003; Rouleau, 2005). By viewing strategy implementation as a dynamic interplay of sensemaking and sensegiving these findings elaborate on the work that has already been done on sensemaking as a social process in support of strategy implementation process. Importantly, these findings resonate with the established views that strategies are often not implemented as originally intended because of TMT's lack of sensegiving actions and the socially negotiated nature of organisational schema change (Balogun, 2006; Balogun & Johnson, 2005). The findings provide new insights around how the differentiated workforces' unique organisational positioning makes sense of and contribute to strategy implementation in different change context (Balogun & Johnson, 2005). This is in line with the views that oganisational change gets enacted through practitioners who mediate the sensemaking between TMT and frontline employees to affect cognitions and actions (Maitlis & Sonenshein, 2010).

Additionally, the findings in this study resonates with the findings of Westly (1990) namely that through understanding the dynamics of strategic conversations as being embedded in organisational ideologies, it follows that the micro-dynamics of strategic conversations simultaneously enact and create strategy as an interpretive system. That is, this study supports the notion that by interpreting and redefining TMT's framing rules, ie., sensemaking, the differentiated workforce was able to redefine organisational ideologies and strategy later (Brunnson, 1985).

From the findings it is interesting that the differentiated workforce overwhelmingly associates their strategic role with facilitating adaptability and synthesising information. The traditional role of implementing strategy, in terms of the frequency of responses, discussed in section 5.3, was third, and championing alternatives was last. The realities of the South African business environment, particularly the insurance industry's state of permanent change, could have an influence on this situation. Regarding facilitating adaptability and giving support to peers, this could be understandable

given their specialist skills and knowledge. Also, this could have been owing to the additional responsibilities the differentiated workforce has been given consequent upon the reduced levels of middle management in the financial sector over the past few years. Similarly, organisational development initiatives focus on employee empowerment and culture change, and encourage agility and innovation, as well as enhanced workforce agency. Some of the participants reported that they initiated strategic directions which had an impact on the organisation's reaction to external and markets changes, influencing strategy by providing alternatives to TMT. The findings support the notion that the differentiated workforce supports the theoretical perspective that they provide both professional and psychological support to the employees. As role models there were instances where the differentiated workforce was involved in managing performance and driving compliance, and also providing skills development by modifying the behaviour of peers to fit organisational needs.

In sum, the increasing emphasis on enacting strategy has deepened insights of the different outcomes of strategy implementation processes. For instance, the SAP view has led to understanding that mutations in practices and routines (Bartels et al., 2016), though traditionally seen as 'failures of implementation, can represent key adjustments to initially conceptualised strategies and strategy implementation plans. This study has demonstrated that process breakdown facilitated feedback to TMT, and consequently leading them to reconceptualise and revisit the initial strategy.

7.5. DIFFERENTIATED WORKFORCE'S ROLE WITH THE MATERIALITY OF STRATEGY IMPLEMENTATION

This study responds to calls for more research to demonstrate that there is a need to better understand how materiality is used by practitioners to realise organisational strategy. We currently have scarce theoretical and empirical resources within strategic management field to address questions about how the mundane daily embodied work of the workforce that interact with the customers contributes to the realisation of strategies and the role of the materiality in this. This study thus recognises the complex nature of human agency through its incorporation of the differentiated workforce perspective that focuses on the core and embodied nature of the work and a materiality approach that stresses the social and material elements of the environment in which strategy implementation work takes place.

According to Dameron et al. (2015, p. 8), "materiality lies at the heart of strategy work". Building on a number of studies which suggest that the workforce plays significant role in achieving organisational strategy (Kaplan & Norton, 2001; Rouleau, 2005; Frei & Morriss, 2012), this study extends the findings to the differentiated workforce. Furthermore, this work extends the research done as part of the material turn in strategy and organisational fields (Le & Spee, 2015) that calls for more

enquiry into materiality in strategy implementation work (Balogun er al., 2014; Vaara & Whittington, 2012). The findings, as described in section 5.4, demonstrate the use of communicative practices and management tools as the only material aspects considered in this study. Meetings and emails are a commonly used means of communication within these organisations.

The current study asked what the role of materiality is in strategy implementation. The current study considered only those material aspects that fall within communication and tools, notwithstanding that material aspects of strategy work are also derived from documents, systems, devices, buildings, emails, among others. Within hierarchical organisations, as was previously mentioned, TMT is responsible for strategy formulation while the differentiated workforce and other employees are responsible for implementing those strategies. During the interviews, participants were asked about how they take part in the strategy texts, such as organisational strategy plan. Many participants said that they comply with the company objectives and use these texts in their operational work. Reports are provided regularly to TMT in terms of business operations and performance. Findings indicate that the use of communication texts such as the individual performance contracts and the annual operations plans reinforces a company's strategic vision. Findings of this research also support the views of Spee and Jarzabkowski (2011) who indicate that, in general, strategy communicated through text creates a shared understanding of strategy.

Face-to-face communication was indicated as the means through which decision making was discussed. Also, through talk interpretations are related and created and strategic actions are developed. This resonates with the findings of Davis (2013) with middle managers at Unisa. Although Davis findings indicated that most of the formal talk and meetings were informal, the use of informal discussions within the insurance sector was infrequent. Project committee meetings, workshops and forums, policies and report writing were indicated as commonly used strategic management tools and these findings were discussed in section 6.5.2. Findings from the current study indicated that, surprisingly, tools like project management and balance scorecard were not used in strategy implementation work in this organisation.

Nevertheless, capturing the contributions of the differentiated workforce strategy work has some difficulties. Firstly, the workforce does not easily lend themselves to study as they are not present in the events or occasions that are normally linked with strategic work, such as TMTs strategic meetings. Secondly, empirical resources to study the differentiated workforce, the material aspects of their work and their contribution to strategy implementation work, are limited.

7.6. STRATEGY ENABLERS ON STRATEGY IMPLEMENTATION

This section examines the differentiated workforce's strategic agency-enabling conditions that permit the roles to be fulfilled, as discussed in section 6.6. The findings of this study indicate that despite the major disruptions that characterise the two organisations, the change management programmes that were initiated had a positive influence on the organisations. These change management initiatives, discussed in section 6.1.2, enabled the differentiated workforce's strategic agency. Employees in these organisations are empowered to perform distinctively and to excel. Leadership in the organisational culture was transformed, talent capability addressed, agility encouraged, and innovation in commercial and business behaviour praised. These enablers resulted in a common understanding about the organisational strategies of the respective companies. An informed workforce which is developed and motivated results in workforce behaviour and action that is in line with the organisation's strategy. This view of strategy implementation resonates with Noble's (1999, p.120) definition of strategy implementation as "the communication, interpretation, adoption and enactment of strategic plans". This study builds on the work of Wooldridge and Floyd (1990) which emphasises the role of middle management in strategy implementation. The findings of this study fall into the following categories: (1) interpersonal behaviour aimed at communicating the strategy to ensure that the daily work of the differentiated workforce is in line with the business strategy; and (2) specific activities and practices used to implement organisational strategy.

Research on enablers of strategy implementation is discussed in section 2.5.6. The enablers can be grouped into "hard" factors such as organisational systems and structures (roles and incentives), and "soft" factors associated with management support for strategy implementation work, such as training and communication. The findings of this research support the views of Mantere (2008) that top management is a major enabling condition. Fourie's (2007) work support this finding. Most of the workforce regarded their inputs as valuable and a major contribution to TMT's strategy work. The findings of this study confirm both the hard and soft factors as enablers of strategy implementation, as depicted by Noble (1999). Organisational culture and compliance are also mentioned as enablers, as soft factors were seen by the differentiated workforce as more important in strategy implementation. Unlike the study of Davis (2013) which is at odds with that of Mantere (2008), this study found that the differentiated workforce's input was sought by TMT, and that TMT reacted to their feedback, a factor that was central to the success of the organisation. According to Chia and Holt (2006), as strategy becomes a tool in everyday practical coping, a well-defined set of objectives that stem from the TMT of the organisation provides a backbone for work activities. This idea relates to

the other enabling condition, which is the contextualisation of the TMT's top-down, well-defined operational plans. This study resonated with these findings.

The other enabling condition that is supported by the findings of this study refers to the sufficient shift in resource allocation that is important for the differentiated workforce to have the necessary support to execute objectives. For some specialists in these pivotal positions, monetary incentives to reward, success, appointments and promotions, and involvement in decision making, may enable the differentiated workforce's agency in strategic activities. When TMT show respect towards the differentiated workforce and their everyday problem-solving, then implementation is enabled (Chia & Holt, 2006; Chia & MacKay, 2007).

From the literature, it was noted that agents draw upon the existing organisational structure to invest their actions with power, which is defined by the agent's position in the organisational hierarchy. While TMT has power due to the positions they hold, agency is an exercise of power in that an agent is to be able to deploy a range of causal powers (Giddens, 1984). Hence, by the notion of practical-evaluative agency power is well encompassed.

Another point to consider is that the differentiated workforce's roles are important at all levels in the organisation because they connect TMT with all the employees. As such, they serve as a conduit for the exchange of information within the whole organisation (Anderson-Ashcraft, 2007; Nonaka, 1994). More importantly, by supporting and advocating alternatives, "supervising" lower level employees, and promoting and backing ideas to bring them to TMT attention, TMT also act as defenders of implementation, as well as facilitating and acting as synthesisers of information. As facilitators, the differentiated workforce protects and promotes activities. And as implementers, the differentiated workforce makes a place for themselves in the organisation and acts as developers who adapt, organise and motivate while implementing new method in strategic objectives.

As indicated by Hodgkinson and Wright (2002), strategy is mediated by the language used by strategists, which impacts on the practice of strategy implementation. Those practices that create opportunities for and organise the interaction between practitioners in doing strategy implementation, such as meetings, training, and workshops, could be seen as examples. These activities are clearly consequential for the practice of strategy. To reiterate, the purpose of this research is to find the strategy implementation practices-in-use and examine their consequences for the strategy, the practitioners who use them, and the interactions that are conducted.

Culture is revealed as a contextual factor that affects the differentiated workforce's strategy implementation. As culture provides an identity for the organisation, it is considered a vital element

for managing organisational change and renewal. Basically, culture sets the foundation for strategy (Aanya, 2014). According to Al Shiwari (2015), to develop and implement strategy successfully, a fit between culture and strategy is required. This can be achieved through trust and commitment. According to Rapert et al. (1996), shared understanding is relevant to effective strategy implementation. In support of this view, Wooldridge and Floyd (1989) point out that shared understanding without commitment may negatively affect business results.

These findings bear significance to the ideas of some SAP scholars such as Jarzabkowski et al. (2007), and Johnson et al. (2007), who note that SAP is an attempt to humanise strategy research on management and organisations. SAP theorists aim to overcome the existing dualism between individualism and societism. This is in line with the ideas of Whittington (2006) who states that there is a need to have a better understanding of the different meanings of practice which serves as a guide for humanity in general.

7.7. CONSTRAINTS TO STRATEGY IMPLEMENTATION

The objective of this section is to identify the barriers and challenges to strategy implementation as experienced by the differentiated workforce. It will shed light on the enabling conditions that facilitate their agency in the business strategy implementation.

It was noted that the insurance business environment is characterised by rapid and fast changes owing to digitisation and cost cutting. As revealed in the literature, these organisations are faced with new challenges that require the ability to be agile. The role of middle managers is being eroded significantly, and the differentiated workforce as specialists is assuming more operational responsibility. To navigate what the PwC Report (2018) calls the “marketplace without", the differentiated workforce needs to be creative and flexible, and to embrace fast-changing policy frameworks and regulations. As more responsibilities are delegated to the differentiated workforce, it experiences role conflict in performing varied tasks which are perceived as key for company success. Although it was noted that the two organisations under investigation have hierarchical organisational structure with layers of management the organisations are profit driven and encouraged a culture focused on agility and the workforce was empowered to excel and to improve and enhance business performance.

Lack of a necessary skills set to perform their jobs, lack of strategy direction, and a decentralised organisational culture, are some of the most common problems related to strategy implementation. Failure in the management of change is revealed as one of the obstacles to strategy implementation.

7.8. RESEARCH CONTRIBUTIONS

Findings of the study have advanced the literature by illustrating the significance of understanding the many different levels across the diverse actors in strategy implementation work. This is achieved by combining formal and informal coordination mechanisms that facilitates co-alignment of different approaches of many organisational actors into a coherent and cohesive pattern of strategy implementation action (Wieser et al, 2020). In fact, this co-alignment occurs both top-down and bottom-up across different functions, divisions, business units and subsidiaries around a given strategic plan. When different organisational actors interactively enact a given strategy, this enacting results in adaptation. This research conceptualises this adaptation dynamic as the recursive interplay of enacting and adapting those results in continuous integration "in action" in strategy implementation process. Moreover, adaptations to strategy emerge more frequently at the lower levels of the organisation as actors' contributions to strategy implementation at these levels relate to operational activities targeted at realising goals that are more imminent and less extensive in scope. Within this context, challenges in strategy implementation inspire immediate performance feedback which then enables onsite adaptations. As strategy implementation actions make more tangible what higher-level strategic goals would mean in practice, on-going feedback and rapid adaptations also need adaptations in the higher level strategies. Therefore, this research suggests that a more fundamental, longer term conceptualising of strategy and strategy implementation emerge from the daily mundane strategy implementation activities (Wieser et al., 2020).

The results of the research make a contribution in terms of the areas for further knowledge production as indicated by SAP scholars like Rouleau (2013), and Vaara and Whittington (2012). These researchers indicate that there is a requirement for further development of research to encompass sociological theories. Also, the contribution must be made where the differentiated workforce will use their social skills combined with their functional knowledge to identify, apply and practise certain actions during their strategy-making attempts. Moreover, in an attempt to understand the "doing" of strategy, this study draws on case-study research, since what people do in the development and implementation of strategy is often captured in the hidden knowledge of practitioners. As a contribution to the subject-matter field of SAP the output of this study encapsulates those practices and processes into a conceptual perspective.

Findings of this study have the potential to contribute to theory in several ways. The first contribution is that it theoretically connects an organisation's management to strategy implementation and specifies the strategy implementation roles and tasks that the differentiated workforce perform. Second, it offers a set of differentiated processes and practices that positively relate to the strategy

implementation tasks and recognises that these micro activities partially influence an organisation's performance. This stems from the lack of studies that explore the critical role that the differentiated workforce plays in the implementation of strategy. Much research examines the development of strategy but there are fewer studies that explore the efficacy of the implementation of strategy, and this despite the overwhelming number of strategy implementation failures (Jooste & Fourie, 2009). What makes this concerning is that some scholars have increasingly come to realise the importance that the differentiated workforce has in the implementation of strategy (Anderson-Ashcraft, 2007; Litterer et al., 1985; Wooldridge & Floyd, 1990).

By creating a new theoretical framework that emphasises the differentiated workforce as an influential practitioner of strategy implementation, this work facilitates a new scholarly narrative about strategy implementation – one that moves beyond managerialist-focused academic work to include the workforce (Jarzabkowski et al., 2013; Laine & Vaara, 2007; Stieger et al., 2012). Establishing the significance of this connection is a vital contribution because it reveals the impact the differentiated workforce can have when implementing an organisation's strategy.

Although much of the current research on strategy implementation work represents a predominantly TMT view, this study has advanced the literature by finding that strategy is something that emerges in the activities of the key non-management professionals in key jobs in the organisation (Bower, 1970; Burgelman, 1983; Huselid et al., 2005). Furthermore, this research conceptualises strategy as something that emerges in the daily mundane actions of these employees by enacting the strategy that is created by TMT. To establish this joint account, the key professionals engage in a sensemaking process that serves to bridge new interpretation and proposed TMT's strategy to the organisation (Spee & Jarzabkowski, 2017). This demonstrates that the role of TMT is to mediate between the various local change narratives of different actors (Balogun, Bartunek et al., 2015). This provides further evidence of the increasingly critical strategic role played by the differentiated workforce (Floyd & Wooldridge, 2000) and to reassess the roles of TMT and middle management.

Results of the research provide an analysis of how individual non-managerial professionals put strategy into practice within the insurance organisation in South Africa. Selling products, teamwork and collaboration with other experts and TMT, developing new products tailored to market solution, operational transformation with simple and efficient processes and new approaches to insurance distribution are identified as strategy implementation practices of the differentiated workforce. These practices may be related to the nature of the insurance industry in a changing business environment that is characterised by major disruptions. Operations efficiency in this context is a 'make or break'

activity because it makes the business competitive by providing the ability to respond fast to changing customer needs. Operations implement strategy by putting strategy into practice.

The study is an attempt to respond to calls by SAP scholars to develop more insights into how various organisational actors influence strategy making and implementation. By problematising conventional and limited notions of what is seen as strategic (Jarzabkowski & Seidl, 2008; Johnson et al., 2010; Paroutis &Pettigrew, 2007), and by extending the prevailing conceptualisations of strategy implementation (Weiser et al., 2020), this study has contributed to knowledge and scholarly conversation on the differentiated workforce as strategy practitioners. By following the SAP perspective, this work opens an avenue to broaden the activities that are considered strategic, namely, the things people do in the organisation, and, importantly, processes that would not conventionally be seen as strategic. This opening of strategy could lay the foundation for greater openness in strategy implementation practices, thus leading to more transparency in strategic communication of TMT towards the organisational stakeholders (Whittington et al., 2011).

The practitioners interviewed in this study held an understanding of their roles in terms of responsibilities and functions on how to implement organisational strategies that were formulated by TMT. This cooperation and understanding present a major departure from the rational dominant strategic management paradigm, discussed in section 2.4.2, by making strategy implementation more transparent. Using the SAP lens, formulation and implementation are interconnected. The results provide a deeper insight into how strategy implementation emerges by exploring the micro-practices and the daily activities of the workforce. By linking these results with the key SAP questions on strategy: who does strategy, what do they do in strategy implementation work, how do they do strategy, what do they use to do strategy, and what are the implications for shaping strategy, this study responds and adds to knowledge development in the SAP as a sub-field within strategic management (Jarzabkowski & Spee, 2009; Jarzabkowski et al., 2007; Johnson et al., 2003).

This study identified a link between SAP call for improved understanding into the role of micro-organisational social processes involving a range of practitioners outside management (Balogun et al., 2003, Jarzabkowski, 2004, Johnson et al., 2003), and increasing evidence that the differentiated workforce play a significant role in strategy work, including implementation (Balogun & Johnson, 2005; Burgelman, 1983; Floyd & Wooldridge, 1997, Huy, 2002), and that their sensemaking impacts on organisational change and strategic renewal as they develop emergent outcomes through their routine practices (Balogun & Johnson, 2005).

Uniqueness of the insurance business organisation environment as it relates to the practices of the differentiated workforce is demonstrated in this research. In a hierarchical organisation the differentiated workforce is responsible for implementing strategies formulated by TMT. The current study also identifies the enabling conditions for the implementation of strategy. The ongoing restructuring within these organisations and the elimination of middle management levels has resulted in the differentiated workforce being given more responsibilities. Furthermore, the differentiated workforce consists of highly skilled workers with professional expertise critical for organisational performance. The differentiated workforce also acts as a role model for others in the organisation and develops systems for the organisation.

In sum, the following main contributions are made in this study:

First, previous studies focus mainly on management and middle managers as indicated by the dominant strategic management paradigm. This study rethinks strategy, strategy implementation work, and strategic agency in order to focus attention on the potential strategic importance and relevance of the work practices of the differentiated workforce in the insurance business organisation environment, and how they actually "do" strategy implementation. The processes that are employed during the implementation of strategy highlights the practices being used in order to be successful.

Secondly, this study also encourages SAP scholarship to acknowledge and better appreciate the creativity and strategic agency of the differentiated workforce as strategy practitioners within the fast-changing business context.

Thirdly, highlighting the complexity of strategy implementation found in contemporary business organisations, the study identifies the interconnected nature of the practices found in the results.

Fourthly, from the differentiated workforce's point of view, this research also adds to the body of knowledge in relation to enablers and constraints of strategy implementation.

Fifthly, the study identifies the practices and processes used during implementation of strategies, thereby adding to the SAP body of knowledge. From the differentiated workforces' point of view this relates to the exploration of practices and processes during strategy implementation. Through this study these were empirically tested and validated.

Lastly, the role of the differentiated workforce is developed to either stimulate further research or to be used by organisations to stimulate successful implementation. The focus on the differentiated workforce has practical implications as it provides management with a better insight into ways that permits a smooth implementation.

By identifying the differentiated workforce's practices executed during day-to-day strategy-making, the practices, and the success of those practices, were made more visible to managers as an encouragement to employ them more consciously, thus making them even more effective. According to PwC Saratoga Research (2008) and Becker et al. (2009), the pivotal employees determine the success of the organisation and are expected to create value. In fact, this employee group always plays a disproportionate role in creating company value and success. Importantly, through this contextualisation, the differentiated workforce may be made aware of what these practices and processes are and may use them to assist in their implementation efforts.

7.9. LIMITATIONS

The fact that only the insurance industry environment was used for this research is the biggest limitation in terms of this study. The sample drawn for this study was restricted to the insurance business context and included representation from only two major organisations. In addition, only the differentiated workforce was included, thus excluding TMT and middle management levels within the two organisations. The insurance industry may not be seen as representative of the total financial services industry in South Africa as it is only one sector within the financial services. This limitation is acknowledged, though it was selected in view of the specific uniqueness of the insurance industry and its contribution to the South African economy. However, while this study cannot be generalised to a bigger population it does encourage further research.

In terms of the approach, within the broad scope of a qualitative approach, a general inductive approach for qualitative data analysis is deemed to be an appropriate and acceptable approach for this research, which is underpinned by a social science paradigm. Intangible practices that cannot be easily measured formed the basis of the study. This might be seen as a limitation, but it was thought to be the best method for this type of study.

Importantly, this study is also limited as it presents snapshot-like descriptions representing experiences, practices, views, perceptions and interpretations at a particular point in time. It may be that at another point in time, the interpretation of the practices would be different.

Within the scholarship on strategic management, the SAP sub-field is a young discipline. The literature and proven research are limited, and, although this could be seen as a limitation, it can also be seen as an opportunity to add value to the current body of knowledge.

The research design adopted in the study had a number of limitations. Firstly, the major data collection was gathered through interviews. Even though the participants were carefully selected to represent

the differentiated workforce roles and contexts within the organisation, this study records primarily the reality as these informants perceive it. The researcher emphasises that perhaps this data could have been reinforced by adopting an ethnographic approach, that is, through participation and observation. This would enable the researcher to cross validate some of the results of the analysis and reach a closer understanding of the strategising practices in the organisation. However, as previously noted, achieving and maintaining this kind of access to two JSE and NSE-listed organisations in a rapidly changing environment would need considerably more time than is allowed for traditional doctoral research, and would need to involve a much larger team of researchers.

Another limitation of the current research is that the topic of strategy implementation is primarily studied using in-depth evidence from only two organisations. Detailed examination of more organisations, although sought, was impossible owing to difficulties in gaining access.

According to Miles and Huberman (1994), there are several limitations that relate to qualitative research. Conducting qualitative research is characterised by frequent data overload and is labour intensive. This, according to Davis (2013), demands more time for processing and coding data and leads to researcher bias. These are often cited as reasons not to follow a qualitative research design. It is also important to highlight that the qualitative researcher rarely makes claims about the representativeness of the setting for wider populations although some generalisation within a specific setting may be possible.

7.10. FUTURE RESEARCH

Several lessons, experiences, shortcomings, alternatives, and other aspects were learned during the course of this study. It is appropriate to make some recommendations for further research in order to share this. From the researcher's point of view, the following are possible areas to be investigated further:

1) Seeing that there is a dearth of SAP research in general, it is recommended that further research be done in South Africa.

2) Further research should focus specifically on the financial services environments because they present some unique characteristics.

3) Particularly from the academic point of view, very little is known about the differentiated workforce and its contribution to organisational success, even though the US Top 500 companies and consulting companies attribute 80% of organisational performance to the strategic role of the workforce.

4) This study looked mostly at the micro and macro strategy-making environment. Research into the meso environment would be a possibility for further study.

5) A longitudinal study gathers more data over a period and therefore provides another opportunity for further research.

The current study was conducted within a dynamic, complex and hyper-competitive business environment. This research could be repeated at other financial organisations. A strong recommendation would be to pursue research that investigates how TMT interacts with the rest of the workforce.

The materiality of strategy work is a new area that needs further research. With so much time spent in meetings and in the use of email communication, these could be further investigated for the ways in which they impact on strategy implementation.

A promising avenue for the future is to conduct more in-depth research in the domain of the differentiated workforce, looking at the ways in which implementation is closely associated with their daily mundane activities and practices. This will provide more insight into the major success factors involved in strategy implementation.

7.11. RESEARCH CONCLUSION

The study gap identified the differentiated workforce as practitioners in strategy implementation from the point of view of the concrete implementation of strategy practices in the insurance industry in South Africa.

The empirical research undertaken in relation to the gap in the research, identified in the literature review, is the unique contribution of this study. How the practices came to constitute the implementation and process of strategy would be the added contribution to the research question. The study also provided a strong set of published data, and furnished views on how strategy is realised with regard to social practices. More importantly, this study confirms the roles, interventions and actions undertaken by the differentiated workforce during strategy implementation.

The objective of this research was to explore, identify and understand which strategy practices and processes facilitate successful implementation in the fast-paced and changing insurance business environment. Through certain practices and processes conducted by the differentiated workforce, the study provides insight into and clarity on the complexity of the strategy implementation process. To

this end, by giving more insight into the South African context, this study has made a contribution to the existing literature.

The literature review began with the dominant strategic management paradigm within the strategic management field. It interrogated theoretical perspectives into strategy implementation, and this was followed by the SAP approach. From SHRM, the concept of the differentiated workforce was used as the human agency in strategy implementation. The four streams of theory were synthesised into the current research. During strategy implementation these interact and integrate. Moreover, individual practices in strategy implementation and the impact and influence of organisational context, strategising efforts, and organisational processes were shown. Throughout this study, the role of the differentiated workforce is embedded in the theme and its influence is defined as the output of the study.

There are specific barriers and enablers, and certain materiality tools used that were identified from the literature.

It has been demonstrated that the outcome of the research in question provides an understanding of the phenomena concerned, and is applicable to the research problem, contextualised by the strategy practices in use at two insurance business organisations in South Africa. It can therefore be concluded that the research objective was achieved.

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Appendixes

Appendix A

SCHOOL OF
Economic & Business Sciences

Michael Olorunjuwon Samuel
D.Com, M.Com, MMP, B.Sc. (Hons.), PGDip. Law
(Labour Law), CHRP (SABPP)
Associate Professor & Head of Division:
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04 August 2016

TO WHOM IT MAY CONCERN

Request for permission to conduct academic research

Mr. Vincent B. Mothuloe

Dear Sir/Madam

The above named is a registered doctoral student in the School of Economic and Business Sciences, University of the Witwatersrand. He is conducting a multidisciplinary research in the fields of strategic management and strategic human resources management. His research interest is broadly focused around the category of employees who are critical to a successful strategy implementation in an organisation. The research is captured under the title: "Differentiated workforce on strategy implementation – a strategy-as-practice perspective". Mr. Mothuloe is in the process of commencing the empirical aspect of his research which is organisation based. He has identified your organisation as a prospective participant in the study and this involves conducting personal interviews with selected individual employees in your organisation.

Wits University, as a responsible academic institution maintains a high standard of ethical conduct in research. To this extent, any information provided by the research participants will be treated with outmost confidentiality. The identity of your organisation and those of the participants will not be disclosed to unauthorised persons or parties.

The purpose of this letter is to request for your express permission granting Mr. Mothuloe access to your employees who are selected to participate in the in-depth interviews.

Do not hesitate to contact me, using the contact details provided above should you require further information/clarification regarding the research.

Thanking you in anticipation of your kind approval of this request.

Kind regards

Prof. OM. Samuel

(Research supervisor).

Appendix B



Yours Faithfully

INTERVIEW CONSENT

I..... hereby agree to voluntarily participate in this interview as part of the research study titled "Differentiated workforce on strategy implementation: A Strategy-as-practice perspective". I understand that I am participating freely and without being forced in any way to do so. I also understand that I can withdraw from participating at any point and that this decision will not in any way affect me negatively. I understand that this is a research project whose purpose is not necessarily to benefit me personally in the immediate or short term. I understand that my participation will remain confidential and my personal information will not be collected nor used in this study. I also understand that my participation will not pose any risk or loses to me and the organisation I am representing.

……..
Signature of participant **Date**:……..

CONSENT FOR DIGITAL RECORDING. I hereby agree to the digital recording of my participation in the study.

……..
Signature of participant **Date**:……..

I understand that the information that I provide will be stored electronically and will be used for research purposes now or at a later stage.

……..
Signature of participant **Date**…….

……
Signature of Researcher **Date.....**

Appendix C

Interview guide

As a professional within your company, you have an important role to play in realising the company Strategic 2015 plan. When answering my questions, please use the company Strategic 2015 plan and formal planning structures in mind as the context for this interview. I am particularly interested in your 'doing' of strategy.

1.	General	Tell me more about yourself and your career at your company
2.	Opening questions	Tell me more about your role in your company
Strategic roles		
	Implement Deliberate Strategy	How do you see your role in the realising/achievement of the company Strat plan 2015 and what are some of the specific things you do to achieve it? Can you describe or give examples of some of the tools that you use in doing strategy?
	Synthesising information	In terms of communication with your team, how do you pass information from T/MT on to them? For example, do you pass it on by forwarding the general email or do you interpret and formulate your own instructions etc? When reporting to T/MT, how do you decide which information is relevant? Can you give examples of what a report to T/MT will contain? Can you give examples of how you communicate upward to T/MT in terms of the strategy processes? Examples of how you have contributed to the strategy; examples of how T/MT responds

	Championing alternatives	How would you describe your unique contribution to the institutional strategy as a key employee working in your department/directorate? Often, things do not go according to plan - either because of delays in committee decisions, system failure, staff resistance, capacity problems etc. When things are not going according to the plan, how do you bring these 'issues' to T/MT attention? How do you deal with issues that require T/MT attention? There are a lot of established protocols within the company – what are the alternative options to communicate with T/MT outside protocol? Can you give examples of such issues and communication? In your opinion, was the issue handled? What would you do differently? Examples of initiatives that you developed in your section/directorate [to influence T/MT?]
	Facilitating Adaptability	Can you give examples of where you modified/changed activities to deal with changing conditions? How did you make the decision? Who was involved? How did you communicate it to others? Explain. If you are uncertain about a specific strategy/ies, how would you deal with it?
	Role conflict	Can you give examples of where you were required to perform in conflicting roles? (i.e., did not agree with the strategy); how did you deal with it?
Organisational cognition and involvement of differentiated workforce in strategising		

		Can you give me examples of situations where you felt that your department/directorate is operating separate from the company (silo view) / your department/directorate is working towards conflicting goals? What contributed to this feeling? Can you give examples of situations where you were involved in the strategic decision making? Describe instances where you were excluded/included from strategy-related conversations Explain how you communicate downwards. What changes have you made to your department/directorate in response to the Operational Plan?
		Differentiated workforce activity and organisational outcomes
		How do you engage/influence your colleagues in the strategy? Can you give me examples of how you contribute to strategy? Describe instances where you incorporated ideas of lower-level managers in your strategising activities? What do you think it is that you should do to implement your company Strategic Plan 2015?

Appendix D

2019/04/25 12:59

DWS Code book

Name	Parent Node Name	Hierarchical Name	Number Of Sources Coded
CONSTRAINTS OF STRATEGY WORK		Nodes\\CONSTRAINTS OF STRATEGY WORK	13
Communication protocol challenges	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Communication protocol challenges	3
Lack of Skills-set	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Lack of Skills-set	6
Lack of strategic direction	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Lack of strategic direction	6
Organisational culture not centralised	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Organisational culture not centralised	4
Role Conflict	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Role Conflict	7
Under resourced	Nodes\\CONSTRAINTS OF STRATEGY WORK	Nodes\\CONSTRAINTS OF STRATEGY WORK\Under resourced	4
ENABLERS OF STRATEGY WORK		Nodes\\ENABLERS OF STRATEGY WORK	14
Appointments	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Appointments	6
Compliance	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Compliance	6
Monetary incentives	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Monetary incentives	6
Organisational Culture	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture	11
Involvement in Decision Making	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture\Involvement in Decision Making	6
Regular Communication	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture\Regular Communication	9
Trust	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture	Nodes\\ENABLERS OF STRATEGY WORK\Organisational Culture\Trust	8
Training	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Training	5
Use Of IT Software	Nodes\\ENABLERS OF STRATEGY WORK	Nodes\\ENABLERS OF STRATEGY WORK\Use Of IT Software	6
MATERIALITY OF STRATEGY WORK		Nodes\\MATERIALITY OF STRATEGY WORK	14
Communicative Practices	Nodes\\MATERIALITY OF STRATEGY WORK	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices	12
Electronic communication	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices\Electronic communication	12
Face to face communication	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices\Face to face communication	6
Informal structures	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices\Informal structures	5
Telephonic communication	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices	Nodes\\MATERIALITY OF STRATEGY WORK\Communicative Practices\Telephonic communication	2
Strategic management tools	Nodes\\MATERIALITY OF STRATEGY WORK	Nodes\\MATERIALITY OF STRATEGY WORK\Strategic management tools	13

Appendix E

Research Office

HUMAN RESEARCH ETHICS COMMITTEE (NON-MEDICAL)

R14/49 Mothuloe

cc: Supervisor : Professor O Samuel

PROTOCOL NUMBER: 1-116/09/15

CLEARANCE CERTIFICATE

PROJECT TITLE

Differentiated workforce on strategy implementation: A strategy as practice perspective

INVESTIGATOR(S)

Mr V Mothuloe

SCHOOL/DEPARTMENT

Economic and Business Science/

DATE CONSIDERED

23 September 2016

DECISION OF THE COMMITTEE

Approved
Permission letters are required before data collection can commence

EXPIRY DATE

01 September 2020

CHAIRPERSON J. Knight

(Professor J Knight)

DATE 02 October 2017

DECLARATION OF INVESTIGATOR(S)

To be completed in duplicate and ONE COPY returned to the Secretary at Room 10004, 10th Floor, Senate House, University. Unreported changes to the application may invalidate the clearance given by the HREC (Non-Medical)

I/We fully understand the conditionsunder which I am/we are authorized to carry out the abovementioned research and I/we guarantee to ensure compliance with these conditions. Should any departure to be contemplated from the research procedure as approved I/we undertake to resubmit the protocol to the Committee. I agree to completion of a yearly prowess report.

_____ _____/_____/_____

Signature Date