Revisiting inclusion in open strategy through the sense of belonging and authenticity

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Résumé :

This paper outlines the case study of a multinational organization in the DIY and home improvement market. The purpose of the paper is to understand human agency of participants constructing themselves through interacting with other actors (Jarzabkowski & Spee, 2009) within the open strategy (OS) process, through the constructs of the sense of belonging and authenticity (Jansen et al. 2014), and how the practices deployed contribute to their level of perceived openness. Through this study we address known coordination problems that arise through the collaborative knowledge creation process that OS is, and how these challenges were resolved. Finally, we start bringing an answer to whether the complexity of OS is worthwhile for organizations.

Mots-clés : open strategy, inclusion, case study

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INTRODUCTION

Open strategy (OS) challenges the traditional view on strategy, as it aims to include traditionally excluded participants in the process and has been defined in the literature as having two main guiding principles; that of transparency and inclusion, both internally and beyond the boundaries of the organization (Chesbrough & Appleyard, 2007; Whittington et al., 2011).

Openness is expected through a wider set of perspectives on the organization's raison d'être, to improve strategic decisions (Seidl et al. 2019, pp.17). The dominant logic (Prahalad & Bettis, 1986) of top management's cognitive models in organizations is challenged by introducing more openness in strategy and with that openness come several benefits (Seidl et al., 2019) such as greater access to information and knowledge (Amrollahi & Rowlands, 2017; Malhotra et al., 2017; Regnér, 2003), in terms of implementation (Denyer et al., 2011; Stieger et al., 2012), regarding legitimacy (Gegenhuber & Dobusch, 2017; Mantere & Vaara, 2008; Morton et al., 2018; Yakis-Douglas et al., 2017), as bearing powers of innovation and challenging business as usual (M. Bjelland & Chapman Wood, 2008; Schmitt, 2010) and the identification of strategy talents (Whittington, 2019). Several challenges (Seidl et al., 2019) have as well been outlined such as increased transparency (Appleyard & Chesbrough, 2017; Mack & Szulanski, 2017), stakeholder pressure, complexity of OS (Malhotra et al., 2017) and stakeholder commitment (Seidl & Werle, 2018; Stieger et al., 2012). Seidl et al. (2019, pp.17) suggest that "the research agenda starts with who to mobilize, and how to empower, in order truly to challenge conservatism".

However, "the who to mobilize and how to empower" depends on the approaches of the OS initiative being either conceived as limited participation, co-creation or deep-engagement (Vaara et al., 2019). Generally, OS lacks openness as to "the variety of the different groups of people whose contributions will be treated as meaningful" (Dobussch et al. 2017, p. 9), as in most cases the strategy-making initiatives qualify more as limited participation (Vaara et al., 2019), which contrasts Whittington et al.'s (2011) definition of inclusion.

Inclusion in open strategy is mainly defined as "the participation in an organisation's 'strategic conversation', the exchanges of information, views and proposals intended to shape the continued evolution of an organisation's strategy" (Whittington et al. 2011, pp.536). The intention is thus to consult a wider range of people traditionally excluded from the 'strategic conversation' and to go beyond the boundaries of the organisation to widen the pool of people involved. As well as implying an increase in transparency, as in the "visibility of information about an organization's strategy, potentially during the formulation process but particularly with regard to the strategy finally produced." (Whittington et al. 2011). However, this definition brings with itself a level of confusion, as the terms participation and inclusion are being used interchangeably within the OS literature (Mack & Szulanski, 2017). Mack and Szulanski (2017), suggest that organizations can manage the tensions arising from greater openness in the process of strategy making, by differentiating and managing the level of engagement of stakeholders in participatory and inclusive practices. Where "participation is about increasing stakeholders' input for decisions (information-gathering activities), and inclusion is about creating and sustaining a community of interacting stakeholders engaged in an ongoing stream of issues in the strategy process (work groups or task forces, with information sharing, interactions and joint decision-making)" (Mack and Szulanski, 2017 : 386 ; Quick and Feldman, 2011).

The work of several authors also suggests that organizations can to some extent control the level of openness, through the levers of transparency and inclusion (Hautz, 2017; Whittington et al., 2011). Such as Dobusch et al. (2017) put it, the level of openness in either the social, factual or temporal dimension evolve in interrelation towards a higher level of openness if one's openness level increases, unless explicitly limited by the organization. However, when it comes to controlling the openness level in OS little is said about the level of transparency. Content-related openness and processual openness are used in a two-dimensional framework of openness looking into three defining elements of openness: (1) Access to sensitive information, (2) Modes of participation and (3) Modes of decision making (Dobusch et al. 2019, pp.). Processual openness is about setting the rules and procedures upfront to avoid individuals to make changes during the process. However, closure in open processes is unavoidable, as to enable certain forms of openness, complementary forms of closure are required (Dobusch et al. 2019, pp.345). With the moving through openness and closure, several dilemmas emerge, such as the dilemma of process, commitment, disclosure, empowerment and escalation (Hautz et al. 2017), which often result in exclusionary practices in order to lower the levels of openness and lower the tensions arising from these dilemmas.

In many cases in the literature of OS, the accent has been set on 'including' the largest number of people within the process (Bjelland & Chapman Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together. We thus think that the definition of inclusion by Whittington et al. (2011), as being the wide inclusion of people traditionally excluded, was partially misunderstood by motivating a wide search of quantity rather than a search to widely provide the sense of belonging and authenticity to those traditionally excluded. Mainly because of the interchanging use between the two terminologies of participation and inclusion (Mack & Szulanski, 2017) and a more pronounced focus on inclusion than on transparency, although both are equally important. Indeed, research has shown that OS overall lacks of openness in the social dimension ('the groups that are treated as relevant participants to the communication process') (Dobusch et al., 2017 : 12). Organizations often open up only towards internal participants, including their employees in early stages of OS and then facing the tensions and dilemmas of OS (Hautz, 2017), leading to exclusions to regain control of the process and managing its complexity.

Therefore, this paper suggests adopting a different lens to look at inclusion in open strategy, to add to the conceptualization of openness in open strategy. This paper takes on the definition of (Jansen et al., 2014), who define inclusion as "the degree to which an individual perceives that the group provides him or her with a sense of belonging and authenticity.". The nuance of inclusion here not being participation and inclusion not being the opposite of exclusion can help in the understanding of the dilemmas and challenges arising from greater openness and help organizations in shaping OS processes by actioning other levers that can contribute to higher inclusion. Considering the previous elements, the following research question is suggested "How can organizations through the sense of belonging and authenticity of participants contribute to the perceived openness of an open strategy process?". Therefore, this paper and research question aim to help "understand human agency in the construction and enactment of strategy and focus the research on the actions and interactions of the strategy practitioners" (Jarzabkowski et al., 2007).

1. THEORETICAL BACKGROUND

Inclusion itself also has many definitions within its own literature stream (Shore et al. 2011), and is also used interchangeably with diversity, although they are distinct constructs. In diversity literature, inclusion is seen as subsequent to diversity whereas in open strategy literature, inclusion is rather the antecedent of diversity. An organization is already composed of many diverse profiles and thus the challenge is to include these diverse profiles as in Shore et al's (2011, p.1265) definition of inclusion: "the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness". The concepts of belongingness (the need to develop and maintain robust and stable interpersonal relationships; Baumeister & Leary, 1995, cited in Shore et al., 2011) and uniqueness (the need to preserve a distinctive sense of self; Snyder & Fromkin, 1980, cited in Shore et al., 2011) are anchored in optimal distinctiveness theory, which says that individuals have the need to be both similar and different from others simultaneously. On the other hand, in open strategy through the definition of Whittington et al. (2011), inclusion of people traditionally excluded and coming from beyond the boundaries of the organization implies that diversity is achieved after inclusion, mainly because diversity itself is not understood in the same way. In open strategy, diversity is more related to the position and role of a person within an organization's ecosystem (this is what we refer to when using the word diversity) rather than being about demographic differences among members, including both observable (e.g., gender, race, age) and non-observable (e.g., culture, cognition, education) attributes (Nishii, 2013).

In the literature, belongingness has been emphasized more than uniqueness (different identities and perspectives), even though it is equally important (Randel et al., 2018), and both elements are usually considered separately (Shore et al. 2011). Indeed, the metaphor employed by Mor Barak (2015), illustrates perfectly well why uniqueness is important, as when individual colors are mixed together, they produce a dull gray; showing that when uniqueness is given up to blend-in, the distinctiveness of people and their ideas fades. This emphasizes the fact that both belongingness and uniqueness are needed to harbor inclusion (Shore et al. 2011) and that the satisfaction of both components through an employee's experiences in a work group contributes to the perceived level of inclusion and is more likely to lead to positive outcomes (Chung et al., 2020).

Building on Shore et al's (2011) definition, Randel et al. (2018) bring forward that experiencing inclusion in work groups is dependent of effective leadership. They define inclusive leadership, as "a set of leader behaviors that are focused on facilitating group members feeling part of the group (belongingness) and retaining their sense of individuality (uniqueness) while contributing to group processes and outcomes". This sits in line with the process of inclusion, where it is the group that includes the individual rather than the individual who connects to the group.

These insights bring us to take on Jansen et al.'s (2014) point of view, suggesting that within Shore et al's (2011) definition of inclusion, valuing uniqueness is not sufficient to perceive inclusion. Where valuing uniqueness in group members can be counterproductive in achieving inclusion because it is exclusionary towards the prototypical members (Jansen et al. 2014). SDT is thus called upon to refine the definition of belongingness and uniqueness through the concepts of relatedness (the desire to feel connected to others – Deci & Ryan 2000 in Jansen et al. 2014) and autonomy (the desire to experience choice, and the wish to behave in accordance with one's integrated sense of self – Deci & Ryan 2000 in Jansen er al. 2014). Autonomy has also later been labelled authenticity (Bettencourt et al. 2006) and defined as "the extent to which a group member perceives that he or she is allowed and encouraged by the group to remain true to oneself". Valuing authenticity thus allows group members to be different from each other whilst also implying that members are as well allowed to be similar to each other. This view thus allows the definition to be broader than valuing uniqueness and considers the inclusion of both atypical and prototypical members (Jansen et al. 2014). Jansen et al. (2014, pp.) thus define inclusion as "the degree to which an individual perceives that the group provides him or her with a sense of belonging (group membership and group affection) and authenticity (room for authenticity and value in authenticity).". In this article, we take on this definition of inclusion as a lens to explore our research question.

2. METHODOLOGY

Since 2003, more and more studies have been using case studies as a method to understand organizations' strategies in practice. A recent article, in line with Whittington (1996) also brings forward that case studies are a "suitable method to perform an in-depth analysis of phenomena when it concerns the perspective of strategy as practice, once it looks at the case in its singularity and so does the strategy as a social practice process." (Bellucci & Lavarda, 2018, p.). Moreover, Flyvbjerg (2006, p.242), brings forward that "a scientific discipline without a large number of thoroughly executed case studies is a discipline without systematic production of exemplars, and a discipline without exemplars is an ineffective one". Thus, this article builds itself around a case study approach, in line with the understanding and definition of Stake (1995) and Merriam (1998).

2.1 Case presentation

The case is set in a multinational company (referred to later on as HomeCo), in the DIY and home improvement market. HomeCo operates on a platform-based approach, enabling all stakeholders to develop their technical and personal skills alongside others in their ecosystem, while remaining agile and responsive. Over 130,000 employees are part of HomeCo, brought together by a shared goal and global challenge. Moreover, HomeCo takes a collaborative approach to development by being a pioneer in participative management through a shared decision-making process helping to shape the group's future. We will be specifically focusing on a strategic project recently deployed by HomeCo, with the objective of co-constructing a new strategic turn for HomeCo by developing and embedding corporate social responsibility in its corporate strategy and spread it throughout its business units, through a stakeholder consultation phase, a collaborative strategy formulation phase and an organization wide series of sensemaking workshops. The case study will thus be specifically focusing on this project, its process and the individuals who took part in it.

2.1.1 Process overview

March 2019: Kick-off

HomeCo launched its strategic process with a two-day event facilitated by the CEO and internal facilitators. For this event, they imposed the diversity of participants, mixing general directors, members of executive committees, a variety of people representing the different jobs of the company, store managers, human resources and the representative of the shareholders. The event gathered about 40 people in a face-to-face setting and the event was open to other participants online. The objective of this event was for the people who were present to appropriate themselves with the corporate social responsibility (CSR) issues of the company and its business model. There was a willingness to develop a pedagogy around the vocabulary used around this subject. From this event was initiated a phase of stakeholder consultation, with the willingness to co-construct an inclusive process around the subject of CSR. The objective was to gather in one month's time the ideas and opinions of the company's stakeholders. To achieve this, the general directors and store managers nominated 2 to 3 stakeholders from within their contact list. They were at liberty to nominate who they though were fit and relevant and together with the group in charge of the process, they validated the questions that would be submitted to their stakeholders.

After 1 week, they overachieved their objective and gathered more than 4500 verbatim from their stakeholders at an international level. These verbatim were analyzed with a software, which lined out the main subjects on which the stakeholders had expectations regarding the company. There were 10 main subjects identified, among which four clearly stand out: (1) waste management, (2) raw materials, (3) the environment, (4) employment. A steering committee was created to create a strategic plan from this broad consultation. Approximatively 10 people were part of the steering committee (1 Global leader CSR, 1 CSR leader, 1 HR leader, 1 BU general manager, 2 internal experts (social and environmental), 1 spokesperson representing those who attended the kick-off and elected that day, 1 leader on product issues, 1 external consultant, 1 facilitator) and were selected because they represent the various angles in the company. Moreover, they all attended the kick-off meeting. the objective was to identify how to organize all the ideas that were collected previously and to find out what the implications and consequences were of each idea. The committee made 2 rounds of revision on the strategic plan.

July 2019: Presentation of the strategic plan

In July 2019, the steering committee presented its recommendations and the strategic plan to the executive board composed of the nine global leaders. There was an impossibility for the board to make a decision. "They were not ready. They needed more data, more reflection on the topic at hand and more support from the general managers". Interviewee 1. However, paradoxically there was an individual acceptance in one's own domain.

August 2019: Annual meeting of the general directors and store managers

At this point in time, the CEO decided that the general directors and the store managers needed to appropriate the process that was set in motion. This was a turning point in the process, without which the whole process would not have been what it is today. The CEO wanted to show and convince the audience that their companies and stores had a role to play in what exceeds us all (as to know climate change and CSR subjects). During this event, five CSR leaders from the company were invited to speak in front of the audience and they talked with their heart and their own convictions on the subject; not on their experience as a CSR leader but through their own personal experience. The audience thus says what it meant to them to hear these stories and that it was necessary to go through this phase. From this moment on the steering committee had free reins to continue to work on the strategic plan.

September – December 2019: Closed room work

Only three to four people continued to work on the formulation of a strategic plan during this time. In early December, the working group found the binding element, which would make everything more embedded and avoid to present something that is off-ground, there was a need to plant it. They presented the first version of their work to the shareholders. The presentation ended with a standing ovation and great comments and feedback on what was presented.

March 2020: Willingness to organize a convention

The idea was to organize a convention in March 2020, inviting over 700 people from the company and invite the wider ecosystem, to present the strategic plan. At that time, due to the pandemic the event was cancelled because of sanitary restriction. The working group did not understand at that time that they would not be able to organize the event a couple of weeks later and were later confronted to the economic reality of stores closing. The context was thus not appropriate anymore to organize such a big event. However, they felt they had to act now, otherwise the enthusiasm and dynamics around the project would fade away. They thus decided to reuse material that had already been shot previously and take the opportunity to make a movie / documentary out of it to pitch their new strategic plan.

May 2020

The movie that was made, turned out to be a pedagogical documentary, explaining the future strategy and had the purpose of being understandable by all employees, town mayors, students, and other stakeholders. They set the point on the fact that the content should not by a strategist-to-strategist content. The documentary set out to promote on-field experience of what was going on in the various business units. It also featured the diversity of the various business units, representing the different countries and brands as well as making sure for gender parity. The objective was that people understand and appropriate the new strategy. The working group put in place several guidelines to ensure that the message was spread throughout the company: (1) the documentary had to be shown during collective meetings, (2) it had to be see on working hours, (3) a communication kit was provided to those organizing the viewing, which had to be thoroughly respected but could be adapted to local context, (4) feedback about the viewing had to be collected and submitted through a google form in order to see which subjects were the most engaging.

The documentary presents 24 commitments formulated from the 4000 verbatims. Among these commitments, 12 were mandatory (gender equality, listening to employees, carbon statement) and 12 were contributory commitments (pedagogy around consuming more responsibly). The workshops were built around 3 steps: (1) Inspiration, (2) Appropriation, (3) Commitment. Throughout these three steps the notion of "together" is very important. How do we get inspired together, how do we appropriate and make sense together and finally how do we commit together and on what? The objective of this workshop is to decide to what they commit as a brand, in their store, in their department. By September 2020, 70.000 employees had followed the 2h30 sessions and the numbers reached 110 000 in June 2021.

July 2020: 1st visioning of the documentary by the executive committee

The executive committee that completely refused the 1st proposal in July 2019, were the first to see the documentary and welcomed it very enthusiastically. From this were created what they call "impulse circles".

August 2020:

The idea behind the impulse circles is that one person in each business unit takes on the role of "master connector" to deploy the workshop. There are 30 master connectors in total and were selected by the general managers of each BU after they saw the documentary for the first time. The role of the master connector is to find relays to deploy the visioning of the documentary throughout the business unit and to train them in the facilitation of the workshop. The working group developed a communication kit to accompany those facilitating the workshop and translated the documentary and workshop materials in 12 different languages for the appropriation to be the highest possible. The visioning of the documentary is done either 100% digitally or 100% in face to face depending on the possibilities due to the sanitary restrictions. Some business units and connectors have decided to take the time and do it in their own way.

The context during which this process has been developed and launched is particular (COVID) and has certainly helped in stirring up the interest and excitement around the process and accentuated the commitment and investment of participants, as individual consciences were raised about sanitary conditions and environmental and social issues. Sometimes the challenge still seems too big but it is already great to do something at our level. The deployment of the documentary continued until the end of the summer 2021. The objective now is to measure the impact of the process. The framework has been set and now the general directors embed the strategy within their business units, it is no longer something that has been dropped on them by corporate. There really is a positive spiral that has been created by the appropriation phase, and there is this "I can do it" reaction, people are ready, and consciences are there. The type of business (habitat) also helps a lot, it is different from the oil industry. The communication process will be reinforced, internal communication and external communication. The positive impact issues team (created during the process, with the appointment of a Global leader of positive impact) is in charge of following up on the KPI's. Each business unit now works on the strategies locally and actions are locally adapted and deployed.

2.2 Data collection

We collected and are still collecting data from different sources and combining real-time and retrospective data collection (Pettigrew, 1990) to ensure veracity and dependability of the collected data. We align ourselves amongst Merriam (1998) and Stake (1995), taking a sole qualitative approach through various methods and types of collected data (Table 1.). Our data comes from various sources, such as archives, corporate websites, social media, internal company reports and artifacts. However, the main data source will come from a series of semi-directed interviews and interactive discussion groups conducted with leaders and employees from HomeCo.

Table 1. Data collection methods

Collection methods	Types of data collected
Semi-directed interviews	Audio recordings, written transcripts, written notes
Interactive discussion groups	Audio recordings, written transcripts, written notes, pictures, cognitive maps
Observations	Audio and video recordings, pictures, written notes
Secondary data	Written documents, movie, power point presentations, social media posts (text, pictures, videos)
Informal discussions	Written notes

2.2.1 Semi-directed interviews

We conducted most of our interviews through zoom as with the COVID-19 pandemic, most employees were and are still working remotely. However, when possible and relevant, interviews were held face-to-face. Researchers have warned against several challenges encountered in conducting online data collection (Howlett, 2021), although, we do find that the pandemic has accelerated and democratized the use of visio-conferencing, which in turn eased our experience of conducting our interviews through Zoom and other digital tools, as people are generally more acquainted to them now. The conversations for example were more private when not conducted at the work place and thus interviewees were more at ease (environment, clothing, schedule) and open in their discussions, which also resulted in interviews lasting longer than in the traditional setting, and were more conversational, more detailed and less formal than in face-to-face settings (Howlett, 2021). Finally, non-verbal cues are still accessible through videoconferencing tools and thus offer an evenly authentic interaction with the interviewee as would a face-to-face setting (Archibald et al., 2019; Sullivan, 2013) and quality did not differ. At the time of writing this paper, 18 interviews were conducted (Table 2.) for a total of 14 hours and 25 minutes, with the longest interview lasting for 1 hour and 24 minutes and the shortest one being 16 minutes. The interview transcripts account for a total of 175 pages, Times New Roman font 12, single-spaced. These interviews were conducted within various business units of the company and were mainly orientated towards the organizing team and those who actively participated in the crafting and facilitation of the appropriation workshops.

Table 2. Overview of the interviews conducted

Organisation code name	Interviewee code name	Job description	Interview duration
BU1	INT1	Project manager - Supply chain & logistics	00:39:16
BU1	INT2	CSR	00:50:23
BU1	INT3	Internal and institutional communication	01:23:44
BU2	INT1	Communication	00:27:01
BU3	INT1	Health and safety	00:44:49
BU3	INT2	Internal and institutional communication	00:42:18
BU4	INT1	Human resources	00:55:02
HQ	INT1	Communication	00:37:31
HQ	INT10	Product manager - Digital data	00:16:22
HQ	INT11	Packing manager	00:57:37
HQ	INT2	Project manager - Quality	00:31:05
HQ	INT3	Quality and CSR	01:14:21
HQ	INT4	Responsible development	01:24:49
HQ	INT5	Safety	00:41:30
HQ	INT6	Project manager - Human resources	01:04:19
HQ	INT7	Climate and carbon	00:54:14
HQ	INT8	Project manager - Quality	00:35:05
HQ	INT9	Marketing	00:26:08
Total			14:25:34

2.2.2 Interactive discussion groups

Interactive discussion groups are an interesting approach to study strategizing. Generally, it is complicated for practitioners to recall upon practices through direct questions, therefore the interactive discussion groups are an efficient method to collect data about retrospective practices and praxis. At the time of writing this paper, the discussion groups are being organized, and aim at gathering data from the wider audience of participants in the process, namely those who participated in the appropriation workshops.

2.2.3 Observations

During the process, it was decided that all employees of the company would take part in an appropriation workshop. These workshops are detailed in the case description but were held either online or in face-to-face settings and aimed at explaining and collectively constructing an engagement within the guidelines of the new strategy. We took part in 2 of those workshops and observed how the workshops were held, organized and what material elements are used. We also have access to pictures and video recordings of previously held workshops which we did not attend personally.

2.2.4 Secondary data

Throughout the time in the field, secondary data, such as the documentary film that was made specifically for and used during the process is also part of the material analyzed. Moreover, corporate communication statements about the process on social media and on internal social and communication platforms was and is being gathered. Finally, we collected elements such as power point presentations used during the process, meeting minutes and google drives where all written and visual elements related to the process are located.

2.3 Data analysis

Our data analysis will be guided by our previous theoretical constructs, as to know the sense of belonging and authenticity of participants in OS processes. We used NVIVO for coding our data and analyzing it in iterative cycles throughout data collection to adjust our data collection if needed (Stake, 1995). At the time of writing this paper the data analysis part is at an early stage. Our data analysis is built around various steps. First of all, we coded and selected the various documents that were used during the process in order to classify the various information and to whom it was available. this led to coding to documents under "internal communication", "connector kits", "working documents" and "open access material". From this, and through the preliminary interviews that we conducted, we were able to reconstitute to the timeline of the process and the various elements that were part of it. From this we were able to write the case description previously presented in this paper. We then started open coding the various interviews in order to better understand what practices were deployed during this process, namely (1) stakeholder listening, (2) strategy formulation through various workshops, (3) organization of the deployment strategy, (4) training connectors and producing the strategy toolkit, (5) facilitating the appropriation workshops, (6) implementing the strategy. From this first order codes started emerging from the data such as empowerment, autonomy, adaptability, entrepreneurial spirit, relationship building, legitimacy or justification. These elements started to sketch out what characteristics were brought forward and valued during this process, and which helped to increase the sense of belonging and authenticity.

3. DISCUSSION

In this section we are looking to describe how the sense of belonging and authenticity contributes to the perceived openness of an open strategy process. As the data analysis is still at an early stage, we will be illustrating some elements by using verbatim's from our interviews.

In many cases in the literature of OS, we find that the accent has been set on 'including' the largest number of people within the process (O. M. Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together. We thus think that the definition of inclusion by Whittington et al. (2011), as being the wide inclusion of people traditionally excluded, should be understood as a search to widely provide the sense of belonging and authenticity to those traditionally excluded, rather than motivate a wide search of quantity of people involved in the process and especially in the strategy formulation and decision-making phases.

Involving a large quantity and diversity of stakeholders is commonly agreed upon to create a vast complexity in OS initiatives, which can lead to missing out on groundbreaking strategic opportunities (Seidl et al. 2019, pp.19). In the case study at hand, the complexity of wider openness, was balanced throughout several phases of openness and lesser openness. Here, voluntarily the word "closure" is not used, as several members of the organizing team have expressed that even though the discussions during the formulation phase were held within a small working group, the working group remained open to those who had questions and wanted to contribute.

Interviewee 1: *"We were not actively communicating about what we were discussing, but we weren't hiding it either. Anyone was welcome to enter the debate."*

In this paper, the process studied shows how various actors have been involved at specific stages and have been given a precise role to enhance the sense of belonging and authenticity of all participants. This is mainly shown through the various cycles of sensegiving and sensemaking that were implemented throughout the process. And the empowerment of certain employees voluntarily engaging themselves in transmitting the strategy through dedicated workshops. This sits in line with the argument that sensemaking is both an effect and antecedent of OS and that sensemaking enables people to contribute, make sense collectively, and respond appropriately to higher inclusion and transparency without valuing one group over another (cite p.254-255).

Interviewee 13: *"I felt freer to express myself with an emotional background and to put into perspective the calling of the company, its utility and what we do. I felt that I could convey my reading of things and that it was heard for a bit at that time."*

The work of several authors suggests that organizations can to some extent control the level of openness, through the levers of transparency and inclusion (Hautz et al., 2017; Whittington et al., 2011; Dobusch et al., 2017), by differentiating and managing the level of engagement of stakeholders through participatory practices (increasing stakeholders' input for decisions) and inclusive practices (creating and sustaining a community of interacting stakeholders engaged in an ongoing stream of issues in the strategy process) (Mack and Szulanski, 2017, pp.386; Quick & Feldman, 2011). This paper finds that the reading through the sense of belonging and the sense of authenticity in the process, helps in understanding how organizations can control the level of openness, as this is not only related to the actual strategic process at hand but also to the organizational climate and contextual influences, which Randel et al. (2018) discuss in their paper as being an important element in the perception of inclusion. HomeCo has developed in the last years a new leadership model, based on authenticity, openness, impactfulness, and interdependency. The consistency of the messages received from the organization and from leadership at HomeCo, thus contributes to the sense of inclusion and the overall sense of openness in the strategic process presented in this case study.

However, when it comes to controlling the openness level in OS little is said about the level of transparency. Content-related openness and processual openness are used in a two-dimensional framework of openness looking into three defining elements of openness: (1) Access to sensitive information, (2) Modes of participation and (3) Modes of decision making (Dobusch et al. 2019). Processual openness is about setting the rules and procedures upfront to avoid individuals to make changes during the process (Dobusch et al. 2019), such as the exclusion of participants throughout the various phases of OS, which does not come without tensions and dilemmas (Hautz et al. 2017). In the present case study, the approach was unconventional as there was no official communication about the process, its intentions, who was to be involved and what the steps were going to be. This however did not diminish the sense of belonging and authenticity, as the process was fully explained to the participants during a strategy appropriation workshop, who found that the process was open and collaborative and identified a sense of belonging with the organization and the strategic process. This study thus shows that individuals will perceive a higher level of inclusion and thus of openness, if, when excluded from a practice, transparency of the practice is maintained, or increased.

Interviewee 12: *"Every time we had the question, we said that corporate was working on a roadmap. There was some teasing on our internal social platform, and then, in the workshops I told the story about the whole process and the feedback was very positive. I find that this process was really exemplary."*

In OS, stakeholder commitment is often discussed, and OS is seen as highly demanding of participants, which pushes the research agenda towards the question of how to efficiently foster commitment and engagement of stakeholders (Seidl et al. 2019, pp.19). In the case study, we did not yet encounter participants complaining about this. The various stakeholders, employees, suppliers, and partners had been interviewed as a first step in the process, to take the pulse of what subjects mattered most them, the various verbatims were analyzed using a software to identify the most recurrent subjects and words. Following came a more closed off formulation phase, where the organizing team reached out to very specific internal experts and project leaders if needed, after which the implementation phase was materialized through strategy appropriation workshops. The workshops have been particularly helpful in balancing out the dilemma of commitment and engagement, as their objective was to explain and make sense of the whole strategizing process, whilst leading to show how and what the participants could do to engage themselves in the implementation of the strategy.

Interviewee 5: *"In the construction of the commitments for me it was less clear how things were done [..] but it's not a problem as I have a logic of trust. We can always do better, but I think things were done quite well"*

One of the main outcomes of the process is the legitimacy it gives to all participants in their daily jobs and the image it sends out towards the various stakeholders. OS literature debates a lot about decision making, however there is more to strategy than just decision making, as it is an interpretative process, reliant on language, trust, information, and awareness (Seidl et al. 2019, pp.17). In the process presented in this paper, the knowledge acquired by the participants through the workshops allows them to legitimize operational decision making or enforce aligned decision making by others.

Interviewee 13: *"In a common time and over several months, we shared, whether you are a general manager or a salesperson in a store, the same information without distinction. So, we have a form of common digestion […] you can't say that you did not know. It puts everyone on the same starting line, and I find that that is extremely powerful."*

Interviewee 2: "*There was no – me small operational employee, I said no to air transport – It was just me reminding about the strategic commitments and I was totally legitimate to do so."*

As a final element, this case study also starts to bring an answer to the question whether it is worthwhile to introduce more complexity in the strategy process (Seidl et al. 2019, pp.19), by showing that complexity can be avoided in the process, yet still maintaining an open characteristic, through balancing the sense of belonginess and authenticity that various practices and actors of the process can bring. Here, over 130 000 employees have been included in the OS process, however the complexity was kept low by cutting down the number of people simultaneously involved, by giving specific roles of facilitation and boundary spanning to certain participants, by cycles of sensemaking and sensegiving and by empowering participants to engage themselves in implementing the strategy.

Interviewee 10: *"The testimonies I got weren't groundbreaking […] it was obvious actually. But we're never far from a good idea and listening to stakeholders is also about how they perceive us and that is always interesting."*

4. CONCLUSION

Organisations need to ask themselves how they can increase the sense of belonging and authenticity when planning for an open strategy initiative, to lower the dilemmas and complexity of open strategy. The case study presented in this paper is a good example of a process that could have led to many dilemmas that are known in open strategy, as the process started out by being very closed and secretive, launched by the top management of the corporate business unit. The process developed itself and became more open throughout the various stages, by including and giving the opportunity to various employees to conduct interviews with key stakeholders of the company, in order to understand what the most pressing and most important elements were and which are identified by their ecosystem as being essential for the future of the company.

This first practice and then later the practices of strategy deployment, organized once again by volunteer employees, regardless of their status within the company, shows that the organization trusts employees by letting them conduct key strategic actions within the organization and finally opens the strategic process. On the other hand, employees trust the organization as well. They believe that what the organization proposes is what needs to be done and that it has been done with the right people. We thus identify that through the different elements, the different practices, participants in this process because of having a higher sense of belonging and authenticity, through the mutual trust that was built prior to this strategic process, through the company culture, but also during the process, through the various practices deployed, finally perceived the process as being open and collaborative.

By looking at inclusion through the sense of belonging and authenticity we identified that participants do not necessarily need to be included in all steps and phases of the process, as the core element of trust contributes to the overall perception of openness in the process. We find that the various practices in this process led in many times to increase or maintain the transparency of the ongoing process throughout the various business units at times when contributions were concentrated and limited to a small working group, which is one of the main elements building towards an increased level of trust.

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