# A Dynamic Perspective on Middle Managers Issue Selling

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**Résumé :**

Cet article s'intéresse à l'issue selling, une puissante forme d'influence stratégique qui reste pourtant peu connue. Notre recherche est basée sur une étude de cas enchâssé dans une banque du moyen orient où 5 mini-cas sont analysés sur une période de 10 ans. Les résultats font plusieurs contributions. En premier lieu, ils proposent une approche itérative épisodique de l'issue selling qui démontre que ce process n'est pas une brève pratique. Deuxièmement, en abordant le processus d'issue selling sous l'angle des resources acquises par l'issue seller, les résultats éclairent l'aspect dynamique du process. Finalement, ils proposents aux managers des tactiques pour améliorer leurs chances dans une action d'issue selling.

**Mots-clés :** Théories de la stratégie comme pratique, Multinationale, Middle Management, Innovation, Etude de cas

# A Dynamic Perspective on Middle Managers Issue Selling

## INTRODUCTION

Issue selling consists in employees or managers developing efforts to convince decision makers about the relevance of an issue that the employee considers important for the company (Morisson, 2014). Applied to strategy, strategic issue selling generally consists in managers developing tactics to convince board members to take a strategic decision or to implement a specific strategic process (Dutton & Ashford, 1993). Despite being introduced more than three decades ago, we still don't know much about issue selling. There are surprisingly only about forty articles in total analysing this critical activity that seems key to managers bottom-up role (Floyd & Woodridge, 1997). The following histogram charts the number of articles published throughout these three decades. Only articles in academic journals, where <issue-selling> is coined as a key word, are captured here based on an advanced search in EBSCO HOST.

**Figure 1. Issue selling articles (source: EBSCO HOST)**

| | 1993 | 1997 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | X | x | x | x | x | x | x | | x | x | x | | x | x | x | x | x | x | x | x | x | x | x | x | x |
| 2 | | | | x | | | x | | | | | | x | | x | | x | | | x | x | | x | x | x |
| 3 | | | | | | | | | | | | | | | x | | | | | x | | | x | | x |
| 4 | | | | | | | | | | | | | | | | | | | | x | | | x | | |
| 5 | | | | | | | | | | | | | | | | | | | | x | | | x | | |

While most research have addressed issue selling effectiveness through a variance approach, considering what move could be more beneficial in certain circumstances, the iterations of issue selling episodes has been overlooked (Howard-Grenville, 2007). Actually, issue selling is an iterative process that may repeat several times before reaching objective (Dutton & Ashford, 1993; Howard-Grenville, 2007). This paper proposes to consider what are the evolutions of issues selling episodes through iterations.

This research is based on an embedded case study of 1 case of a bank in the middle east, in which 5 sub-cases have been analysed over a period of 10 years. We show that each issue selling process consists in various issue selling episodes. We show the moves that middle managers practice at each episode and finally consider what has changed from one episode to the next until approval.

This research is still in progress but preliminary contributions can be considered. First, it proposes an iterative episode-based view of issue selling that stresses that issue selling is not a short process. Second, it articulates moves of middle managers with asset accumulation over time, shedding light on the dynamic perspective of the process. Third, it gives managers new tips to improve their issue selling chance.

# 1. THEORETICAL OVERVIEW

## 1.1. Middle Managers Strategic Issue Selling practices

### 1.1.1. Issue selling

Issue selling is a process by which individuals, mainly middle managers, within an organization bring ideas, concerns, solutions and opportunities together in ways that focus attention and invite action (Dutton et al., 2001). Issue selling has been identified as a critical process in the early stages of decision making that shapes an organization's investment of time and attention (Dutton et al., 1997). The issue selling literature can be grouped in two categories: the first and most common research category has focused on the intention to sell, analysing the antecedents, contextual cues and even relation drivers that are favourable to it (Dutton et al., 1997; Dutton et al., 2002; Luo and Wang, 2014; Gorgijevski et al., 2019; Alt and Craig, 2016; Conroy and Collings, 2016). The second category of research has analysed the mechanics of the selling process, the how i.e., the moves (Ling et al., 2005; Howard-Grenville, 2007; Sonenshein, 2006; Bishop et al., 2011; Ashford et al., 2017; Gorgijevski et al., 2019; Conroy and Collings, 2016).

Issue selling has been theorized as a process with two main dimensions: packaging moves followed by selling moves. Packaging moves include how issue sellers frame the issue (for example as a threat or opportunity) and how they present it (for example using logic of a business plan). Bundling the issue (for example tying it to value goals or others) is also considered a packaging move. Selling moves include preparation, involving others, formality and timing. This includes 'doing one's homework' at the initiation of issue selling by understanding decision makers and shaping the messaging. Involvement moves were later added as a category and include who to involve in issue selling efforts and the nature of involvement (Dutton et al., 2001).

### 1.1.2. A PRACTICE VIEW OF ISSUE SELLING

Issue selling has been considered through a strategy-as-practice approach. The strategy-as-practice or practice approach distinguishes between practices, practitioners and praxis, the 'what' the 'who' and the 'how' respectively (Whittington, 2006). Practices are defined in the broad sense of 'accepted ways of doing things, embodied and materially mediated, that are shared between actors and routine over time' (Reckwitz, 2002; Schatzki et al., 2001). Praxis is defined as the 'interpretative enactment of practices by practitioners' (Reckwitz, 2002). None of these practices is fixed in its trajectory overtime and by reflecting on experience, practitioners are able to adapt existing practices (Whittington, 2006).

We cited 3 studies that have adopted a practice perspective in issue selling. Dutton et al. (2001) applied insights from practice theory and practice theory's emphasis on situated knowledge to better explain the practical accomplishment of directing attention to issues in organizations. Their research revealed the importance of relational, normative, and strategic contextual knowledge in this process. They recognized, however, falling short in examining how the process unfolded overtime in context.

Howard-Greenville (2007) adopted the practice perspective and conducted their analysis of issue selling practices between, across and within projects. Their research presented issue selling as a form of resourcing whereby issue sellers use four assets to draw upon: ability to mobilize personnel or money, relationships, expertise and normative knowledge. Their model, however, implied that there is 'no magic formula' for issue selling moves.

Chen et al. (2021) followed the practice perspective to examine chief information officers' information issue selling practices. Their results showed that CIO's issue selling effectiveness, rather than structural position, directly influences the level of organizational digital innovation success. Their research represented a paradigm shift (i.e., from a structure perspective to a practice perspective) in IS leadership research, especially with regard to understanding how the CIO may increase his or her organizational influence.

### 1.2. Issue selling: a variance / process dichotomy

#### 1.2.1. A variance approach based on effectiveness of issue selling

Scholars vary in terms of how they define issue selling effectiveness. Dutton and Ashford (1993, 1997, 2001) focused on direct effectiveness as measured by two precursors: the amount of time and attention top management devotes to an issue and increases or decreases in issue seller's credibility. In cases where the issue seller is a multinational corporation (MNC) instead of an individual, credibility as a measure of effectiveness is replaced by bargaining power. For example, an effective subsidiary's issue-selling strategy would have a positive effect on its bargaining power and increases its intrafirm competition within the MNC (Gammelgaard, 2019).

Research focusing on the indirect effectiveness of issue selling examined how issue selling initiates or constrains organizational strategy agenda (Howard-Grenville, 2007). Agenda issues in turn may facilitate organizational change and shape organizational adaptation (Bishop et al., 2011). The main point here is that time and attention of top management are neither a sufficient nor a necessary precursors of substantive action.

The emphasis on direct or indirect effectiveness of issue selling is in many ways affected by the type of logic adopted in understanding the significance of issue selling. According to Dutton, issue selling is significant to both individuals and organizations according to both an instrumental and a symbolic logic (Dutton and Ashford, 1993). Instrumental logic emphasizes how issues selling affects concrete and substantive actions whereas symbolic logic emphasizes the processes role in creating and sustaining meaning. Regardless of how the performance of issue selling is measured, the significance of issue selling and ultimately how issue selling effectiveness is measured has direct bearing on the application of issue selling knowledge. For example, if effectiveness is measured in terms of top management attention, organizations interested in creating a more adaptive culture can empower their employees by teaching them how to frame issues.

Studies that deep-dived on issue selling moves examined issue selling effectiveness. For example, the “use of a business logic” is more often described in successful selling episodes than unsuccessful ones (Dutton et al., 2001; Sonenshein, 2006). “Involving others” is also frequently cited as a tactic used in successful issue selling episodes (Dutton et al., 2001; Ling et al., 2005). Existing research also suggested that “preparation moves” are issue selling tactics that matter most (Bishop et al., 2011; Gorgijevski et al., 2019). Other scholars that have examined issue selling effectiveness concluded differently, that there is no one best-way to sell an issue (Howard-Greenville, 2007) or that tactics can be used differently in different locations and context (Ling et al., 2005).

The reason for this ambiguity is that findings in issue selling research are often “generalized across content” (Ashford et al., 2017) or “unitized” (Conroy and Collings, 2016). For example, findings about choice-of-channels are grouped across informal or formal channels (Dutton et al., 2001; Mayer, 2015; Ul Haq, 2017; Gorgijevski et al., 2019) or private and public (Conroy and Collings, 2016). It is similarly the case for issue characteristics with findings grouped across issue content, for example social and non-social issues (Alt and Craig, 2016; Mayer et al., 2019). Nature of involvement is another area that is broadly grouped across formal/informal forms or breadth of involvement (Dutton et al., 2001; Ling et al., 2005; Howard-Grenville, 2007), with not enough empirical work to identify how stakeholders should be involved.

Another potential explanation for the ambiguity around issue selling effectiveness is that not many considered issue selling's dynamic nature. By obtaining measures of variables at a single point of time, they obviously missed some of the temporal dynamics (Morrison and Phelps, 1999). For example, one issue selling episode may be influenced by the success of past efforts or the independent variables affecting issue selling may have changed.

### 1.2.2. A PROCESS APPROACH TO UNPACK DYNAMICS AND ITERATION IN ISSUE SELLING

Issue selling is recognized to be a long and effortful process that requires persistence on the part of the issue seller to raise the issues repeatedly and make continuous proposals (Dutton et al., 2001, 2002; Ashford and Barton, 2007; Bishop et al., 2011; Henderson and Stackman, 2013; Meidell and Kaarboe, 2017; Mayer et al., 2019; Jarett, 2020). Nonetheless, the methodological challenges that researchers may face, for example data collection method, has limited their ability to examine a process that may take several years from start to end (Ong and Ashford, 2016). Recognizing these limitations a number of scholars (for example Morrisson and Phelps, 1999; Dutton et al., 2001, 2002; Piderit and Ashford, 2003) called for more research on how issue selling, as a dynamic process, unfolds overtime.

Instead of considering the dynamic nature of issue selling, other scholars used moderators to explain differences in issue selling performance. For example, Gammelgaard (2009) who surveyed five Danish MNCs operating subsidiaries in the Asian region, demonstrated that subsidiary management composition had a moderating effect on issue selling effectiveness. In other words, parent-company national managers were better at selling issues than host-country national managers. Bishop et al. (2011) examined manager tenure and demonstrated that prior experience in the organization and industry leads to use of higher levels of issue-selling patterns.

To date, only Howard-Grenville (2007) has explored the unfolding of issue selling though iterations of issue selling episodes. She describes how issue sellers develop resources in order to better convince decision makers about the relevance of considering the issue. Her perspective about cumulating assets shed new light on the issue selling process. Nevertheless, though adopting a resourcing perspective, her paper does not address how moves interact and change over time. In that view, we raise the question: What are the evolutions of issues selling episodes through iterations?

## 2. METHODOLOGY

In this research, we use an interpretive embedded cumulative case study of five issue selling of digital innovations in a leading bank in the middle east region.

### 2.1.RESEARCH SITE

The bank is one of the largest and best performing in its region. Throughout much its existence, it had enjoyed near-monopoly status in its core market. In the early 2000s, the bank became a pioneer when it adopted a regional expansion strategy to grow beyond its core market. Through a series of greenfield set ups and acquisitions, the bank expanded its network to include more than ten countries. The expansion was accompanied by an evolution in the bank's strategic planning and management practices and a shift from a top-down to bottom-up approach. In that period, the decision making process at the helm of this bank gradually shifted as well to become more inclusive and then turned collective when a new Top Management Committee (TMC) took over. The TMC includes all executives in the bank with a title CEO or Group Head with four leading figures (GCEO, DGCEO, CEO Home Market and DCEO Home Market) that had strong affiliations to the bank's board of directors and had been part of top management for decades.

Over the last decade, the bank's decision makers were confronting many of the same competitive pressures that challenge most banks, including a need to lower costs, focus on quality, and accommodate an increasingly demanding customer. Moreover, although the banking sector in the country where the bank operates remains heavily regulated and protected, competition from digital disruptors such as FinTech was increasing. These challenges translated into a heightened interest in, and pressure for, innovation. At the same time, the bank nurtured a conservative culture that often translated into resistance to innovative issues or projects where the bank had no track record or competency. It is precisely this tension, between a low organizational context favourability and high environmental threats from digital disruptors, that made this unique context interesting to analyse.

### 2.2. Cases selection

The criteria for selecting issue selling cases was complex. Being on site, we could follow many discussions from the incremental development of the narrative (Vacquier et al., forthcoming) and retrospectively select relevant issue selling processes that have unfolded through multiple iterations. We eventually selected five cases, three digital projects that were successfully sold and delivered, one digital project that despite several selling episodes had not yet been approved to move into implementation, and a proposition for a new subsidiary. We included a brief description of each case in Table 1 below and their corresponding status at the time of the data collection period.

**Table 1. Cases selection**

| Issues | Description | Status |
| --- | --- | --- |
| **Digital Money** | Setting up a multi-country money management platform for regional customers. | Pre-planning phase |
| **Digital Platform** | Setting up a new system to automate the back end and front end of all treasury products and services. | Delivered |
| **Digital Customer** | Setting up an analytical platform to provide a single view of customers across business groups and geographies. | Delivered |
| **Digital Attacker** | Setting up a new digital bank in a market outside core market to grow presence. | Delivered |
| **Subsidiary Entity** | Setting up a legal entity in a market outside the core market to offer wealth management products and services. | Delivered |

### 2.3. DATA COLLECTION METHOD

Data was collected over the period February 2019-March 2021. During the data collection period, we were full time on site at the head office premises of this leading bank and interreacted regularly with the middle managers, who were the project owners for each project, and other participants. Interviews served as the primary source of data in order to capture, as completely as possible, a retrospective account of the issue selling process as it unfolded over time and the elements that seemed most important in the interviewees' understanding of the story. We conducted 6 interviews per mini case and made sure we had the project owners, i.e., the issue sellers, and a sample of issue receivers and observers. This approach enabled us to take a more holistic view of the selling process, to understand the interdependencies and influence of each of these actors and to triangulate evidence.

The second category of data consisted of informal discussions and non-recorded meetings that we documented using hand written notes. The informal discussions were held with middle managers close to each project. Although they did not accept to be recorded or to go into project specifics, the discussions gave valuable insights about the context and lessons learned about what works and does not work when selling digital projects. The non-recorded meetings were formal project management meetings that we attended as researchers to enlarge our understanding of the projects and the research question.

The third category of data consisted of internal documents pertaining to each project, for example presentations and minutes of meeting that project owners compiled overtime and over the course of multiple selling episodes. Their use was to support and triangulate evidence coming from the interviews. We were not privileged to keep those documents and they were handed in hardcopy by the project owners. We reviewed the documents, took notes as needed to confirm results and handed them over to the project owners. Table 2 presents an overview of data collection methods.

**Table 2. Data collected**

| **Project title** | **Interviews** | **Non-recorded meetings** | **Informal discussions** | **Documents** | **Volume of data in pages** |
|---|---|---|---|---|---|
| **Digital Attacker** | 6 | 2 | 9 | 3 | 103 |
| **Digital Money** | 6 | 4 | 9 | 5 | 126 |
| **Digital Customer** | 6 | 5 | 9 | 6 | 128 |
| **Digital Platform** | 6 | 2 | 9 | 5 | 119 |
| **Subsidiary Entity** | 4 | 0 | 9 | 1 | 65 |

## 2.4. Data analysis

The initial task was to organize the data by mini-cases as collected from the various data sources. The subsequent action was to use what the middle managers said was done, how they convinced, why there were not satisfied etc. to develop a narrative for each mini-case (Langley, 1999). We used the accounts of the other participants (observers, receivers) to triangulate the data and complete the narrative. We used other data sources as well to validate the information, going back and forth to the documents handed to me by each project owners and to the project related notes taken during informal discussions and non-recorded meetings. The events we were investigating were well documented. We ended up this step through creating issue selling episodes for each case.

The second step of our analysis consisted in coding the data in a theoretical way. We used Dutton and Ashford's issue selling framework (2001) to direct the method of data analysis (refer to table 3 for coding grid). The framework grouped nineteen issue selling moves into three general categories (packaging, involvement, selling process) and seven subcategories (presentation, bundling, framing, targets of involvement, nature of involvement, preparation, and timing). We created in NVivo nodes for each of the category (parent nodes) and subcategories (child nodes). We also used Howard-Grenville (2007) idea of assets cumulation to consider what assets was at disposal at each issue selling episode throughout the whole temporality.

**Table 3: Coding grid**

| Parent node : category 1 | Child node : category 2 | Child node : category 3 |
|---|---|---|
| **Packaging** | - Presentation | - Use logic of business plan<br>- Make continuous proposals<br>- Package issue as incremental |
| | - Bundling | - Tie issue to valued goals<br>- Tie issue to key concerns<br>- Tie issue to other issues |
| **Involvement** | - Targets | - Upper level<br>- Same level<br>- Lower level<br>- Outside the organization<br>- Keep boss informed |
| | - Nature | - Involve people formally |

| | | |
|---|---|---|
| | | - Wide range of involvement |
| **Selling process** | - Preparation | - Doing one's homework |
| | - Timing | - Early involvement<br>- Opportune timing<br>- Persistence in selling activities |
| | - Channels | - Use of formal process<br>- Use of written communication |

In our last step, we focused our analysis on identifying a logic for how issue selling practices changed overtime by revisiting the data and to create for each mini-case a time line of key events and decisions, and a context chart showing who was involved in each selling episode and what the patterns of moves were in each episode. This exercise allowed us to produce a visual aid to configure data between and across projects.

## 3. FINDINGS

Our findings are organized as follows. First, we identify practices that are developed by issue sellers. Second, we propose an episode based of each mini case that enables to consider how issue selling moves unfold over time. We then propose a preliminary cross case analysis that requires further refinement.

### 3.1. ISSUE SELLING MOVES

Project owners, as issue sellers, used 3 groups of issue selling moves: packaging moves, involvement moves and process moves. All the moves resembled those identified in previous issue selling work, reinforcing the finding that middle managers use similar practices to influence decision making (Bishop et al., 2011; Howard-Grenville, 2007). The next sections include a brief description of each.

### 3.1.1. PACKAGING MOVES

*Use logic of a business plan.* Using the logic of a business plan to present a project is a critical part of the formal process of approving projects in this leading bank. It is therefore a well institutionalized selling practice that was mentioned by all the interviewees. Typically, the business case was constructed internally using numbers and charts as well as qualitative information. There was no uniform template. An external consultant might be brought in for support and validation. In digital cases, however, there were challenges with formulating the business case. One executive explained:

> *Digital projects were very difficult to really quantify like Digital Customer. How do you quantify the benefit of Complete Customer View on selling, on cross selling, on really improving the quality of this service, and on so many things, how do you quantify it? It's not easy. As for Digital Attacker, the proposition was that I will have X clients, this amount etc. You get it right, you don't, who knows, it's still very uncertain.*

*Package issue as incremental.* Interviewees used different terms to describe this packaging move: « peace-meal», « de-risk », « step by step ». Nonetheless, interviewees, who mentioned this move, presented it as a last resort rather than something project owners would adopt from the get go.

*Tie issue to valued goals or key concerns.* Interviewees mentioned that projects were tied to valued goals such as profitability and market share. Only in one case, Digital Platform, the project owner tied the project to mitigating risks, a concern for key constituents. The prevalence of this bundling move, relatively to the others, was mainly because, as one project owner explained, framing a project as an opportunity was perceived as more effective for selling:

> *It is easier for a revenue generating project then a cost saving project to get approval, or a risk reduction project unless otherwise it is a regulatory project.*

#### 3.1.2. INVOLVEMENT MOVES

*Wide range of involvement.* In terms of the nature of the involvement, interviewees spoke about a wide range of involvement. Some even mentioned that the nature of the involvement was a function of the importance of the stakeholders. For example, one project owner said:

> *For the most important stakeholders, we involved them in the business case and we made them in the core team in order to get their buy in. We did not make it as they are stakeholders, we made them as partners. And the other stakeholders, based on their relatively to the project, we involved them accordingly.*

Generally, interviewees spoke more about the objective behind involving others more than the nature of the involvement. They said the objective is to « reach alignment » or to « get their buy in ». This was important because lack of alignment amongst stakeholders was frequently mentioned in rejected projects. For example, one middle manager who participated in Digital Money:

> *They went for (a project owner) junior level that couldn't achieve alignments with very senior stakeholders. It was positioned as a global product. That just meant more stakeholders with different incentives and these incentives and the purpose behind these incentives were never addressed.*

*Outside the organization.* Interviewees spoke of involving external consultants to build a business case or identify business requirements when internal resources lacked the expertise. On the non-digital project, an external consultant was brought in to do the business case, however it was mainly to validate what executive management already knew and for the financial projections and to provide a benchmark.

### 3.1.3. PROCESS MOVES

*Doing one's homework.* The practice meant going the extra mile to collect information in preparation for selling the project, over and beyond the deliverables dictated by the bank's protocol (that latter included a business requirement document, vendor research phase followed by request for proposals from 3 vendors). For example, the project owner in Digital Customer conducted a case study:

> *It was much easier to sell, to go to top management and say, we did this case study, and this case study took one month and we still couldn't get what we wanted. If you implement the system you'll get it on a daily basis.*

*Early involvement of stakeholders.* Some interviewees mentioned involving stakeholders early in the process of selling. One of the executives explained:

> *The earlier you involve people, from day one in the thinking, the earlier I mean when you start, if you make people feel that they own it from day one, it's much better, it's much better than making people join mid-way or some way after. You know when you are on a white paper from the scratch, on the drawing board, if you bring people with you on the brain storming, on really seeing the problem, defining the problem, at a very early stage, definitely they will help. Because they feel they own it, there won't be resistance.*

*Persistence in selling activities.* Persistence was mentioned in all the digital cases and was not mentioned in the non-digital case. Interviewees used different terms to describe persistence: "a lot of effort", "fight for it", "constant kind of selling", "push and push", "dedication", "eagerness", "your neck is on the line", 'takes a lot of energy'. One middle manager involved on two cases explained:

*The more the business is actively pushing and engaged, the most likely that this project will come to life sooner. If you don't fight for it, there are other businesses, other locations in the bank that could take your spot. Yes, you have to be always there, always aware of what's going on as far as projects within the bank so that you don't lose your slot*

*Opportune timing.* Interviewees mentioned that the timing of the sell can be based on the level of support that existed for that issue, the pressure for action on it and the availability of information. For example, one middle manager explained:

*If I tell myself how to approach our management, let's say 10 to 15 years back, where digitalization was not a core focus of the bank back then, maybe it would have been a much tougher sell for us, being it doesn't fit within the bank's overall objectives. However as you know, for the last few years the bank has been strongly focused on digitalization and how we can improve the customer experience for our clients.*

### 3.2. Chronology and practices of each sub-case

#### 3.2.1. Case Digital Money

*First episode 2011-2014.* The story of Digital Money started in 2011 in one of the strategy planning cycles when money management and transaction banking were buzz words in the banking industry. As a result, the bank decided to develop and offer clients money management to stay in line with international and regional offerings and to boost revenues. There was, however, a lack of traction. The project sponsor did not appoint a project owner and used IT to lead on vendor selection, scope and requirements for the system. As a result, it was some time until the project reached top management for approval and, when it finally did in 2014, it was rejected. One executive explained:

> *IT started playing the role of business to set the business requirements in the name of helping them but in the end they're not facing the customers. The owner has to be the business because they're the ones who have to commercialize it and take it to the customer.*

*Second episode 2015-2017.* In 2015, the bank recruited a fully dedicated resource for money management and appointed him as project owner. The new recruit was a product manager, first-level manager not middle management. The task given to the new product manager was to select a specific vendor and relaunch the identification of requirements phase. No detailed justifications were needed nor business case at that stage as top management was fully supportive of the project and there was in fact pressure to press forward and to get back on track. In 2017, however, top management put the project on hold again, citing issues with the vendor.

*Third episode 2017-2018.* The team repeated the process again, calling in a number of new vendors. They then selected one vendor and repeated one more time the requirements phase. The project however was put on hold for the third time and executive management asked the project sponsor to bring on board the right expertise level to steer the project. One middle manager working on the project explained:

> *This project wasn't a success from the beginning because it was a very new product and it was difficult to assess the resources that were needed to proceed.*

*Fourth episode 2019-2020.* In 2019, a middle manager was onboarded as Head of Money Management. This new project owner prepared a business case presentation and repeated the vendor selection process but soon discovered the challenges:

> *I engaged IT but they had an IT committee prioritization challenge in terms of projects and the International Group was confused whether they need the project or not.*

The project owner presented the new business case in February, 2020 to all the CEOs. He covered a regional money management platform, across all the bank groups. In Mid-April, executive management put the project on hold due to the corona pandemic.

*Fifth episode 2021.* In January 2021, after the project owner and project sponsor approached executive management to put the project back on track, they were asked during the meeting for a business case again. By this time, the project owner was put under pressure to reduce the scope of the project:

> *We came back with the vendor evaluation but the International Group did not foresee much of growth in their corporate business, whilst the other groups are clear to go ahead.*

One executive offered a different reason for reducing scope:

> *They didn't completely comprehend the complexity of the technology stack that comes with having something like that. Our biggest enabler, IT, was fully and totally maxed out in terms of resources.*

*Sixth episode 2021-2022.* Group Strategy was called in to help in rescoping the project and preparing the business case. The new approach the team had now adopted was to build the business case focusing on home market first with a roadmap of where to be in 3 to 5 years. The platform was therefore to be built with an optionality of having additional products and flexibility on the channel to allow regional integration. One middle manager felt more confident about this submission:

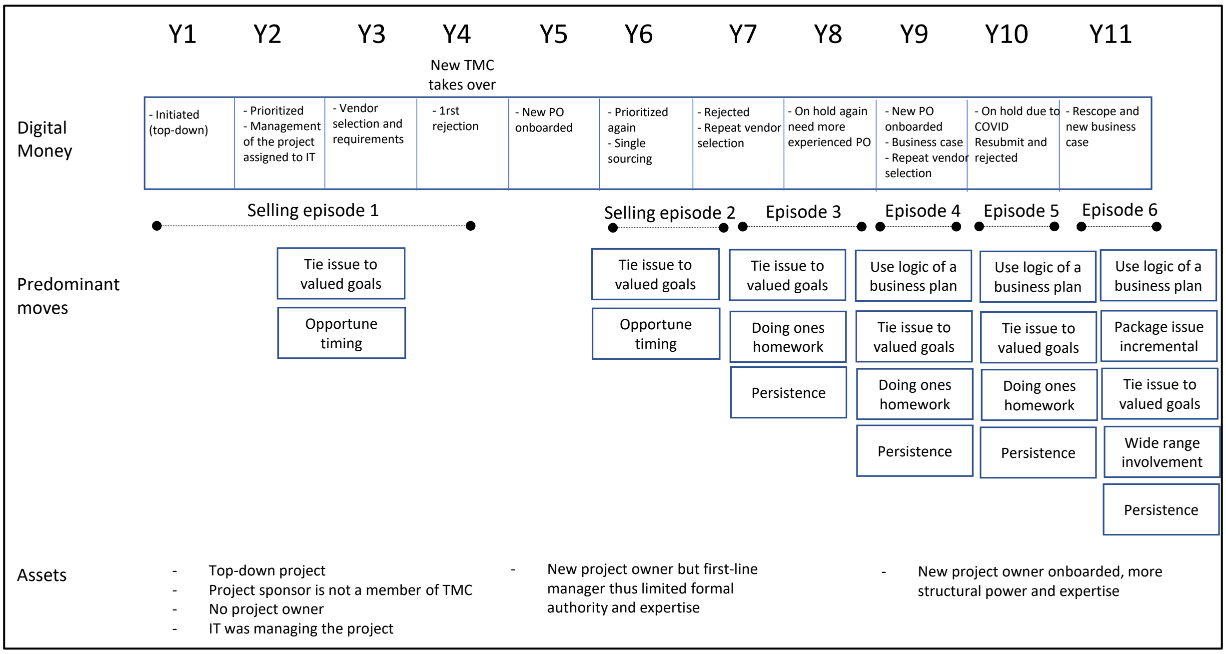
> *We're in the final process of approving it and I think it will get approved because a lot has been unofficially approved. We're just formalizing it to some extent you can consider that we're formalizing it, because all the variables have been frozen so hopefully it will be done probably in the next 1 or 2 months.*

There were a total 6 selling episodes on Digital Money. As illustrated in Figure 2, the patterns of issue selling moves were very different in the later episodes compared to the earlier ones. In the first episode, because the project was initiated by the GCEO, it required no selling. However, it was also initiated with limited assets (formal authority, structural power and expertise), which resulted in a lack of traction. Long delays led the project to be submitted after the new TMC took over in Y4, and that latter rejected the project.

Next, the project sponsor appointed a project owner, however this also failed to achieve momentum because that this first-line manager lacked the structural power and expertise to successfully sell the project, despite two consecutive attempts.

By the fourth selling episode, the project was given a subject matter expert and middle manager as new project owner, but it was put on hold due to the pandemic. At the next selling episode, because not all the stakeholders were on board, it was again rejected. None of the selling so far had included "involvement moves", a misstep the project owner corrected on the next and final episode. This shift was combined with a shift in packaging moves: the project owner used "package the project as incremental", a concession made to get buy-in.

**Figure 2 : Digital Money shifts in moves and assets overtime**




### 3.2.2. Case Digital Platform

*First episode 2012-2013*. The story of Digital Platforms started in 2012 when, during the diagnostic phase preceding the strategy planning cycle that year, it was recognized that the bank's treasury system was no longer 'fit for purpose' given the bank's size. One executive explained the challenges that led the project to be rejected:

> *This was a large investment for a unit that does not necessarily contribute a lot. The business case is more around eliminating risk and making sure that we can actually handle business needs, and potential launching new products in the future. But we faced a challenge because risk typically points to problems after the fact.*

*Second episode 2016-2017*. In 2016, Investments, another unit in the bank, submitted a business proposal for a digital solution. Top management committee rejected the case because the scope and the cost of the project were larger than initially discussed. The project owner, explained what had happened:

*We invited the vendors, they did their presentations, we picked a vendor and it was 2, 3 hundred thousand dollars. But then when we told the finance team what we were doing, they wanted to be also connected, then operations also wanted to connect everything together, then suddenly the price became 3 or 4 million dollars.*

*Third episode 2017-2018.* The project team decided to combine Investments and Treasury and resubmit the project for approval. A middle manager explained the rationale:

*At that time, a member in the project steering committee said why don't you then involve treasury because treasury has been looking into possible ways to replace and upgrade their existing system. We are paying this much on an infrastructure project that is common whether we do a treasury or an investment or treasury and investment.*

The scope had become bigger and more complex and the project owner understood that he had to emphasise the value at risk in order to justify the larger spend. The project owner explained:

*I called internal audit and told them I need you please on top of our annual audits to go and look into this specific system. I ended up with a bunch of audit recommendations or audit points, and that was my starting point.*

Another important anchor that the project owner used in his justification for the project was that the current treasury system had reached end-of-life and will need major upgrade. The project owner presented in 2018 the new project, however, after vendor selection and requirements phase, top management committee rejected the project because of issues with single sourcing one vendor.

*Fourth episode 2018-2019.* The project owner explained how previous rejections impacted the approach taken next: to use an external vendor to prepare the business requirements for the project, a phase usually handled with internal resources:

*We learned a lot from the first process because we know what we want but we don't know what's available in the market, stuff that we might use but we are not aware of.*

After that phase, the project owner was more confident with approaching the top management committee with a business case and project scope. In 2019, the top management committee adopted Digital Platform.

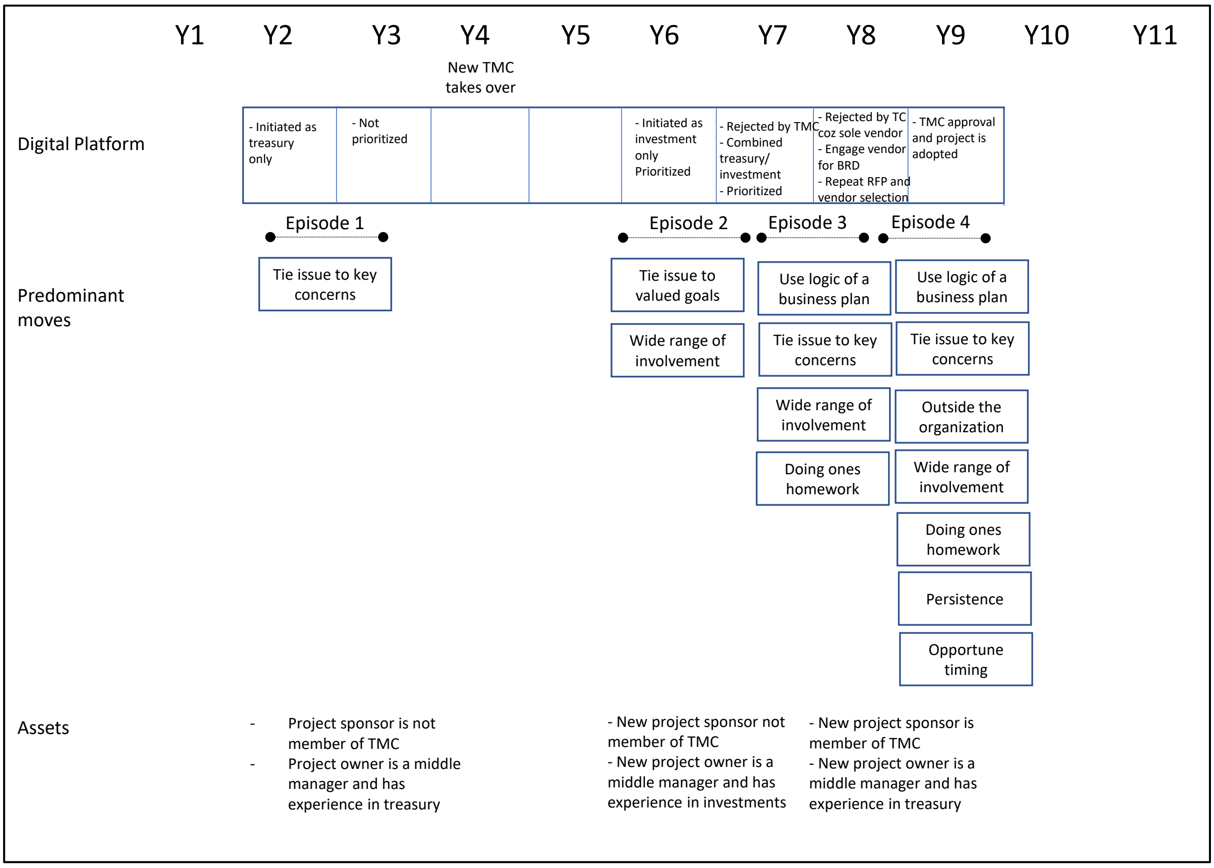
There were in total 4 selling episodes on this digital project. As illustrated in Figure 3, the project demonstrated similar shifts in patterns and moves as in Digital Money but the selling was ultimately successful on this case. We noted a few distinctions between the two projects.

First, Digital Platform also started with limited assets but gained each type at a faster pace. At the start of the third selling episode, the projects had already accumulated formal authority (dedicated project owner), expertise (knowledgeable project owner) and structural power (influential project sponsor and project owner as middle manager). This accumulation of assets in Digital Money was more staggered and their sponsor was not as influential.

Second, the project owners knew the context, which led them to launch 'involvement moves' earlier in the process, demonstrating again that achieving buy-in is a necessary (not sufficient) precursor of issue selling effectiveness in the context of this leading bank.

Third, the project owner used previous experiences of resistance and failure to shift moves, for example, the shift in 'packaging moves' in episode 3, when the project owner packaged Investments and Treasury as one. The involvement of a consultant, 'outside the organization', to prepare the business requirements was another example.

**Figure 3 : Digital Platform shift in moves and assets overtime**




### 3.2.3. Case Digital Attacker

*First episode 2018.* The project was formally initiated in 2018 by the Head of International Retail. The justification was clear: to establish a meaningful retail presence to stabilize the bank's corporate presence in a sizeable country X. With the project sponsor, they decided to appoint an external consultant since they lacked the experience to build a business case for a pure digital play. Despite the external consultant expertise and the backing of the influential project sponsor (the Deputy Group CEO), top management did not approve the project for a number of reasons. An executive explained:

*There was resistance from IT in terms of capabilities and resources, that this is too big. And also, doubting capabilities, that we are able to hire people, that we are able to do it, that it's just too big.*

Moreover, there was some reluctance by some members of the top management committee to be one of the first banks to launch a digital bank in the region. The project owner elaborated:

*Maybe it's a lack of trust, whatever you say and give a lot of examples, they would say no we still need to bring someone from outside, someone who has done it before and we said if you bring someone from outside to fit within the culture of the bank and the processes of the bank, it will take time.*

*Second episode 2019.* Sourcing and recruiting someone who had expertise in digital delayed the project. A middle manager recalled what happened after the TMC rejected the project:

*The project owner and his team, they spent tons of time trying to understand what are the capabilities, how we can help them, what time frame do they need, trying to make them not sell our idea but be at least on board. Finance, we needed to conform, although we had a business case, and we had everything, we needed to involve them much more in the details.*

In 2019, the project was resubmitted for approval to top management. An executive explained the changes in the environment:

*Competition has increased in home market with small attacker banks coming up and the CEO of our local Islamic subsidiary was making very good steps in technology and in digital.*

Within this context, top management questioned the choice of the market and rejected the project.

*Third episode 2020.* The team had to reconvene and build new arguments. An executive talked about these new arguments:

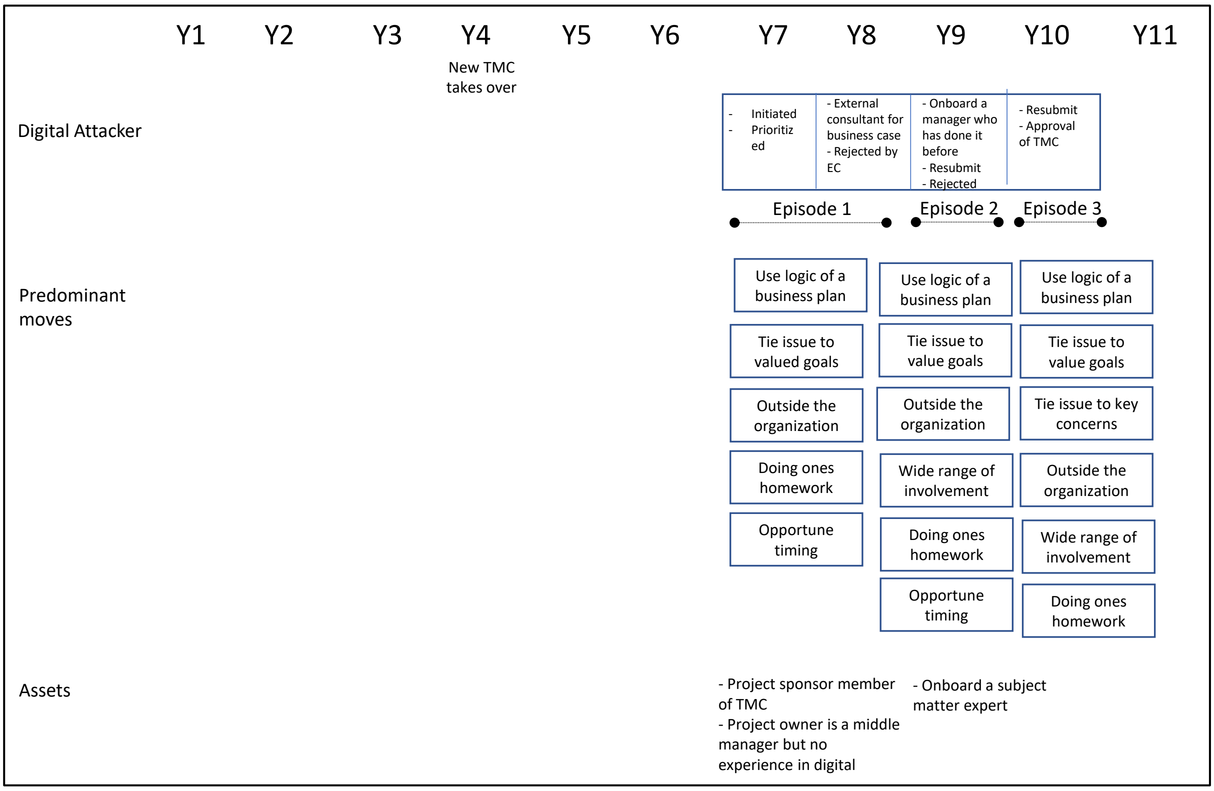
> *We didn't want to basically start it in the home market. In the home market to start digital and fail, many banks in the past failed in digital, it will impact your name, your reputation, your bank in your best market which is the home market.*

This approach worked and after some time, the project owner resubmitted the project a final time to top management. With that final submission, the top management committee finally adopted Digital Attacker.

There were in total 3 selling episodes on Digital Attacker. As illustrated in Figure 4, selling at this digital project involved a number of moves from the onset. However, because it was missing what we learned are critical elements for issue selling effectiveness in this leading bank, both expertise and involvement moves, it was unsuccessful. The project owner addressed these gaps in the next selling episode, but the delays were accompanied with a change in context. It was no longer opportune timing to deploy the project in Country X and the bank's decision makers were questioning the justification behind the choice of market.

To address this resistance, the project owner shifted packaging moves, tying the issue with the key concerns of constituents (which was reputation risk if we fail in home market). This shift led to success and the project was adopted.

**Figure 4 : Digital Attacker shifts in moves and assets overtime**




### 3.2.4. Case Digital Customer

*First episode 2012-2013.* The story of Digital Customer started in 2012 when a hidden data problem was identified during the diagnostic phase preceding the bank's annual strategy planning cycle. The data problem was the result of the bank's migration to a new core banking system, a migration that had faced many challenges and budget overruns. The data problem was 'hidden' because data users in functional and business areas of the bank were not voicing their data problems to top management and instead were dealing with their data issues in silos, often assigning more resources to conduct manual workarounds and reconciliations. Within this context and with the strong resistance from the bank's Finance function to commit additional capital expenditures to technology, the project was rejected.

*Second episode 2014-2016.* Overtime, with mounting regulatory pressure and increasingly more demanding reporting requirements, the data problem was becoming more and more evident across the bank. Backed with more people talking about data problems, from Risk, Finance and Treasury, there was another push in 2015 for a solution, a comprehensive data warehouse project. However, it was rejected again on the basis that it did not meet criticality and benefits criteria compared to other projects that year. One executive explained:

> *We tried to move a proper data infrastructure project forward while we were talking in the context of Basel 3 implementation and at that point in time we turned around and pushed for a comprehensive data warehouse project, which would include requirements for risk, finance and treasury. The project however was stopped.*

*Third episode 2018-2019.* In 2017, the bank's top management decided to create a specialized data function to be in line with a trend in the regional market and to address mounting pressure from the regulator on data quality and security. A Chief Data Officer joined in 2018 and his first task was to identify the main pain points for data in the bank. The subject of data infrastructure was thus quickly reopened. An executive explained:

> *With the new Chief Data Officer, we reopened the discussion on a data warehouse. Let's make this a revenue business case: let's build a data warehouse and with this let's generate a Complete Customer View of customers starting with corporate so that we can show results faster.*

Digital Customer was now born, turning what is essentially a data project into a revenue business case and focusing on an area of the bank (corporate bank) that had a relatively large contribution but where performance had been declining in recent years. To get the go ahead for initiating the project, the Chief Data Officer had to first explain to his project sponsor the concept of complete customer view:

*It was about 3 months from the inception, the conception stage where I actually drew it on a piece of paper what Complete Customer View means, spoke to the sponsor, top management committee, and once I got that yeah this looks good, it will help us.*

He then resolved to demonstrate that there was a gap between the needs of the business and the current system. To demonstrate the gap, he conducted two case studies:

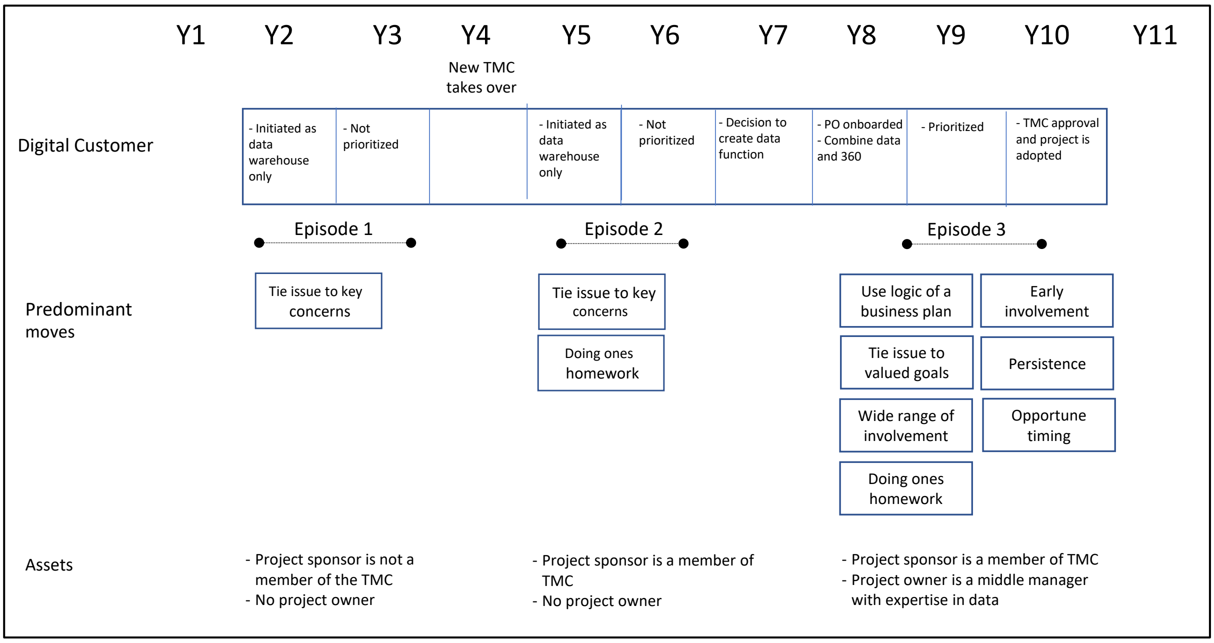
*So we picked up two case studies, let's say these are my two corporate customer groups, let me try to build a Complete Customer View for these two. Knowing full well that it'll be very difficult to put that together because the process is all manual. After spending a month, we still couldn't put it together.*

The timeline for Digital Customer from initiation to approval was a relatively fast one compared to other digital projects in the bank. In fact, it took a record three months for the project owner to present the project to the top management committee and get the preliminary approval.

There were in total 3 selling episodes on this digital project. As illustrated in Figure 5, we see patterns of moves and assets, similar to the previous two digital projects. What led to successful issue selling performance in the third episode?

First, onboarding a subject matter expert and middle manager as project owner in Y8 injected in the project formal authority, expertise and structural power. At the same time, the new project owner understood the context to immediately launch 'involvement moves' and completement them with 'early involvement' of stakeholders. Finally, the shift in packaging move, when the project owner packed the data project as revenue generating, showed that there was learning from previous experiences of failure and resistance.

**Figure 5 : Digital Customer shifts in moves and assets overtime**




### 3.2.5. Case Subsidiary Entity 2015-2016

The story of Subsidiary Entity started in 2015 when a new CEO for the Wealth Management and Investment Banking arm of this bank was appointed and immediately initiated the project. One middle manager explained:

> *An organization change led to a different person leading the asset management business which is a different entity (Finance Company), and that person is pretty dynamic and has the ears of executives, so I think that person was a key person in moving this proposition.*

The rationale for the project was simple: expand the bank's offerings and footprint in country X under its strategic diversification umbrella. The project built a lot of traction quickly. A middle manager explained the reasons:

> *This project, which is expanding into another country, was probably a bit more casual than the normal project governance framework typically followed in this bank. At least*

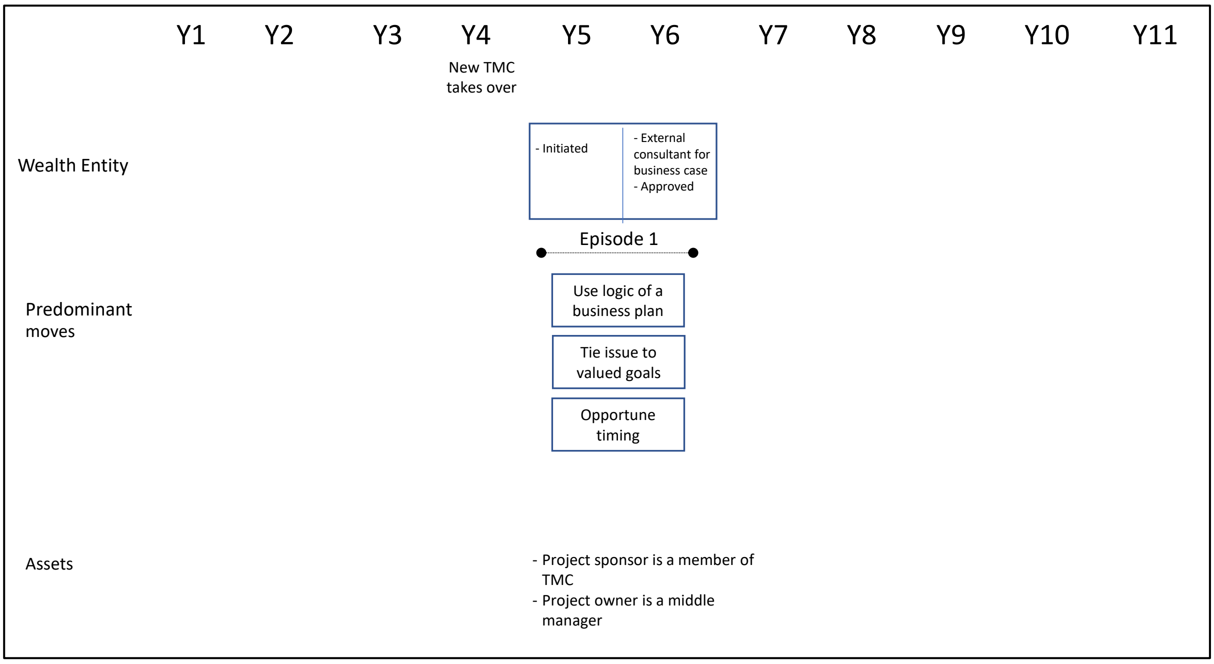
*in terms of getting approved, probably, I would say in my mind it was a no brainer to some people so they didn't want to go into too many bureaucratic steps.*

Within year after project initiation, the top management committee approved the project. One executive provided the following explanation:

*The difference between this one and Digital Attacker is they're going to the same market, they're using a consultant to build a business case but in one case it was more peripheral business, you are going to replicate what you are doing and the people that you have, management trust that they can do it. On the digital side, you don't have the resources and the track record, so it was a more difficult decision, that's why it took a lot more time.*

Only one selling episode was required on this project and it was approved within one year. Compared to the other digital projects, this project did not imply innovation in terms of technology or operating model and as a result, just a couple of issue selling moves were needed to get it approved. Moreover, the project was initiated with strong assets (influential sponsor and a dedicated project owner).

**Figure 6 : Subsidiary Entity moves and assets overtime**

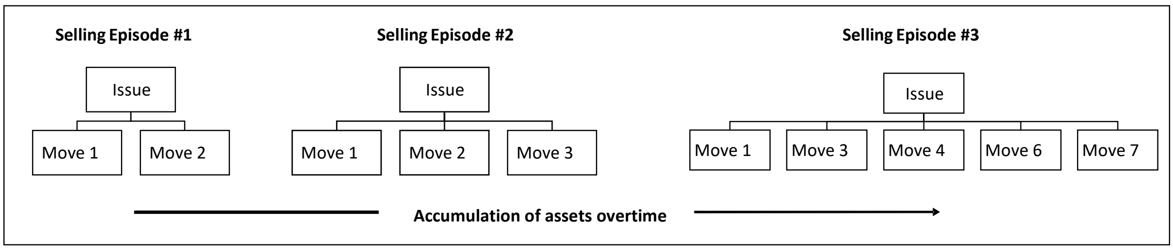



### 3.3. A RENEWED PERSPECTIVE OF ISSUE SELLING PROCESS

We recognized, across all four digital cases, a number of important themes for issue selling effectiveness. Primarily, when projects are initiated with limited assets, the faster project owners accumulated each type of assets (formal authority, expertise, structural power), the faster they can achieve issue selling success. Accumulating assets, in turn, unlocked abilities to launch different patterns of moves. Second, 'involvement moves', are necessary but not sufficient precursor for issue selling effectiveness in this leading bank. This was expected given the bank's conservative culture and collective decision-making. Issue sellers that knew the context, successfully launched these moves. Third, successful issue sellers learned from resistance and failure in previous episodes and implemented shifts in moves accordingly. For example, the project owner on Digital Customer packaged the data infrastructure project as revenue generating and the project owner on Digital Platform combined both Investments and Treasury into one. Finally, as we analysed the shifts in moves overtime, it became evident that contextual knowledge is an asset as well for issue sellers to draw upon. For example, project owners who launched involvements moves knew or learned overtime that they needed to navigate the political aspects of the context. In the same token, the project owner in Digital Attacker who tied the choice of market to reputational risk, knew that this was a concern for key constituents.

This analysis expanded our lens, accounting for the observation that issue selling moves cannot be fully understood if we don't consider as well the context and how the process unfolded over time. Moreover, applying a more dynamic view led us to consider that issue selling activities shape and are also shaped by the issue selling process. As a result, we proposed in Figure 7 a renewed figure of issue selling. The figure suggests that, in order to successfully sell an issue, issue sellers must accumulate assets (formal authority, expertise, structural power, contextual knowledge) to unlock their ability to launch issue selling moves and fine-tune the way they combined and implemented them. An important implication is that multiple issue selling episodes are thus unavoidable on harder-to-sell issues, such as digital projects that are initiated for and by the business side often with limited resources. Astute issue sellers would therefore benefit from accelerating their acquisition of relevant assets and experiencing early on with moves.

**Figure 7 : A renewed figure of issue selling**



## 4. DISCUSSION AND CONCLUSION

Our study is in progress, we propose here preliminary ways to contribute to the existing literature on issue selling.

### 4.1. THEORETICAL CONTRIBUTIONS

This study makes a number of theoretical contributions to the issue selling, middle management and IS literatures. The first theoretical contribution was to reflect on the dynamic nature of issue selling and provide empirical evidence to the practice perspective of issue selling that presents issue selling as a form of resourcing. This served to address a gap in the existing literature to analyze how issue selling unfolds overtime through the interplay of context and action. Within the context of this leading bank and its conservative culture and collective decision-making process, all the four digital projects covered in this research had witnessed multiple submissions because they all involved a "new way of doing things". As a result, the timeline for these projects to move from initiation to approval stretched overtime. One of the digital projects, Money Management was initiated in 2011 and at the time this research was conducted was still not approved. In contrast, the non-digital project wealth entity took one year only from initiation to approval. As a result, digital projects in this leading bank constituted good subjects to study how issue-selling evolves over time and to test and then confirm Howard-Greenville (2007) finding that issue sellers improve their craft overtime through a process of building resources and learning.

A second theoretical contribution for this research is that it led us to consider why some middle managers influence strategy more than others. Despite the growing body of empirical and theoretical work on the topic, understanding why some middle managers are involved in, and influence, the strategic process more than others is an important, and somewhat neglected, research issue (Wooldridge et al., 2008). Our findings show that middle managers who are more effective in issue selling were more successful in getting top management to adopt their digital projects. This research thus suggests that, by improving their issue selling craft overtime, middle managers can more successfully influence, 'how projects become projects in the first place' (Kingdon, 1990), and thus shape the strategic agenda of their organization.

As a third theoretical contribution, this research proposes a middle way approach to digital innovation success, focusing on the role of middle managers and their strategic impacts in the digital era. Organizations that want to succeed in digital innovation adopt different models. On one side of the spectrum, they opt to create a centralized function, for example a chief digital function, with the responsibility to shape their digital agenda and to deliver business value from using digital technologies. On the other side of the spectrum, organizations choose to decentralize digital innovation, involving all the voices in the company for example by using an innovation management solution. The role and impact of the middle manager however remains largely overlooked.

### 4.2. PRACTICAL IMPLICATIONS

This study proposes that issue selling effectiveness would benefit middle managers who want to sell digital projects up the chain of command. These projects are typically highly innovative, costly and thus are harder-to-sell with long informal gestational periods, the time from initiation to adoption. How does issue selling effectiveness benefit them?

There is a practical benefit in issue selling effectiveness if organizations are willing to take a number of steps to prepare and support issue sellers. First, organizations can enhance issue sellers opportunities to acquire contextual knowledge. For example, one strategy could be to educate sellers about their own organization. Another strategy could be to include decision-making process in orientation programs for new recruits. By doing so, organizations can unlock middle management participation and create a bigger market of issues where sellers have similar depth and breadth of contextual knowledge to execute a variety of issue selling moves.

Moreover, by educating themselves about issue selling, top executives would acknowledge that giving some resources to digital projects that are not yet sanctioned can in fact cut down long informal gestational periods, the time from initiation to adoption, and thus reduce time-to-market. This research has shown that the assets needed for sellers to gain traction on a digital project are nothing but a small percentage of organizational time and money (for example appointing a fully dedicated issue owner with the right level of formal authority and expertise).

### 4.3. Conclusion

We acknowledge the several limitations of this study. The limitations stem from the applied research design and methodology. First, our analysis was limited by the number of digital cases we covered. The criteria used to select the units of analysis (digital, large, complex projects) restricted our selection. In other words, there were not too many projects that fit that criteria within one single organizational setting. Second, our data consisted of retrospective accounts. One problem with such accounts is the accuracy of the recall of events and processes. We tried to minimize this limitation by triangulating evidence from different interviewees and data sources. No matter the use of different data sources and the triangulation effort, the narrative portion of the findings (first order findings) still included what we interpreted from the data collected as being meaningful for the generation of insights. However, even if the researchers' interpretation is never absolute, an ethnographic explanation can be accepted as meaningful if it accounts for the data in a plausible manner against our own set of explicit and implicit assumptions about social processes (Douglas, 1975).

The results of this study suggest several directions for future research. First, this study represents the first empirical study to examine middle managers issue selling in a leading organization in the banking sector, but our understanding of the triggers and willingness to engage in issue selling remains limited. Future studies should take a more fine grained analysis to understanding what triggers issue action or upward influence in a similar context, and more specifically what motivates middle managers in a way that makes them persistent, willing to come back over and over again with the same issue. Second, this study proposes differences between selling digital and non-digital projects and as well as a number of issue selling practices that are considered more effective in the specific context of this leading bank. We invite future research to test those propositions in other contexts, for example what happens with the same configuration in other non-digital projects and whether all failures in digital were due to the same elements. Finally, this study presents a renewed figure of issue selling based on a practice approach and a dynamic view and proposes that issue selling activities shape and are also shaped by the issue selling process. Future research may build on this insight to investigate more systematically this finding and test it in a larger sample of cases and middle managers.

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