

Reflecting on Organizational Transformation Strategizing

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Abstract:

In the face of increasing turbulence in the business environment, we argue that strategy-making no longer consists of allocating resources through planning, but on the conduct of transformation projects. To understand how this strategy process works, we first characterize organizational transformation strategizing from a theoretical standpoint and then describe its reality based on the reflections-on-action of consultants who have delved into strategizing through the conduct of transformation projects. This dialogue between the academic and practical knowledge of strategizing offers fruitful contributions to our current understanding of an important but overlooked aspect of strategy processes.

Keywords: strategizing, organizational transformation, theory-in-use, reflection-on-action.

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INTRODUCTION

Since the 1980s, the conduct of strategy in organizations led to more emergence in the strategy making process (Mintzberg & Waters, 1985). This is due to the increasing turbulence in the strategy environment, now characterized by crises (Mithani, 2020; Wenzel et al., 2021), which has changed the practice of strategic planning (Whittington et al., 2017), leading to a disconnect between strategic planning and strategy-making (Mintzberg, 1994). While capital budgeting and strategic planning have remained for short-term and forecasting purposes, respectively (Mintzberg, 1994; Ocasio & Joseph, 2008; Whittington et al., 2017), *strategizing* is performed elsewhere and evolves over an intermediate timeframe (Kaplan & Orlikowski, 2013). Despite the exploration of *strategizing* activities in transactional cost theory (as opposed to economizing, cf. Williamson, 1991), information systems (Galliers, 2011), strategy-as-practice (Johnson et al., 2003), or industrial networks (Holmen & Pedersen, 2003), *strategizing* remains under-conceptualized (i.e., the actions of people to position the organization, align it with the IT system, implement its strategy, or initiate and respond to changes in the network, respectively). Therefore, the goal of this article is to understand the reality of *strategizing*.

To this end, in this article we show that strategizing is inscribed in transformation projects (Mitchell & Zmud, 1999), which are designed to transform organizations to face turbulent environments (Besson & Rowe, 2012; Tushman & Romanelli, 1985). We then define *strategizing* as *the process by which strategy actors deliberately transform their organization to realign it with its environment, formulating and implementing a strategy through meaning-making during transformation projects*. Based on this definition, we analyze the reflections of junior consultants on their strategizing during the implementation of 44 transformation projects (Schön, 1983).¹ It leads to an understanding of the impact of organizational transformation on consultants' strategizing and to a description of it as a dual process of strategy deployment and strategy project steering. These findings offer contributions to the two strands of literature that have similarly witnessed a shift in how strategy operates since the 1980s: the open strategy and strategy process literatures. They also offer implications for strategy consulting and the teaching of strategy.

¹ As this work is in progress, results only comprise the 19 projects conducted in 2022.

This article is organized as follows. In the first section, we unpack the various characteristics of strategizing. The second section then describes our methodological approach, which aims to understand what strategizing is from a practitioner's perspective, building on the reflections of junior consultants of transformation projects. The third section then presents our findings, which are discussed in the final section of the article.

STRATEGIZING CHARACTERISTICS

In this section, we unpack the various characteristics of strategizing. We show that it is situated in organizational transformation, inscribed in strategy projects, embedded in organizational path dependency, produced by strategy actors, unfolding through a process, and constructed through meaning. Based on these characteristics, we offer a definition of strategizing.

SITUATED IN ORGANIZATIONAL TRANSFORMATION

Strategizing is a practice that is situated in a specific organizational environment. When change is emergent, there is neither an environmental trigger for change (Plowman et al., 2007), nor an exploration of environmental opportunities (March, 1991). Resources are allocated through capital budgeting, which does not require strategizing, as actors enact change through a series of subtle shifts (Orlikowski, 2000). Furthermore, when change is incremental, it is triggered by experimentation with new products, structures, and processes that successfully become institutionalized (Quinn, 1980). Because change is steady, ongoing, evolving, and cumulative, it also does not involve strategizing as the organization exploits its current path (March, 1991). Change relies on improvisation through limited structure and real-time communication (Brown & Eisenhardt, 1997).

We argue that strategizing is situated in organizations operating in turbulent environments (Thomas & D'Aveni, 2009), which are currently an omnipresent part of organizational life, as illustrated by the crises that have burst during the last decades (dot-com bubble burst, terrorist attacks, financial crises, pandemic, geopolitical conflicts, etc.) (Mithani, 2020; Wenzel et al., 2021). Environmental shocks trigger radical (or revolutionary) change, which involves the allocation of resources for organizational transformation (or strategic renewal) that cannot come from planned changes (Mintzberg, 1994). Through this process, organizations move from their equilibrium state to redirect their resources toward changes in the fundamental properties of organizations, including their structure and practices (Besson & Rowe, 2012; Gersick, 1991; Romanelli & Tushman, 1994).

INSCRIBED WITHIN TRANSFORMATION PROJECTS

Such organizational transformation is inscribed within transformation projects (Mitchell & Zmud, 1999; Zmud & Cox, 1979), which include strategy formulation—including chartering, which involves the decision-making to fund the strategic project, and design, where critical decisions are made—, strategy implementation, evaluation, and control. Examples include the transformations of Imperial Chemical Industries in the 1980s and of Philips a decade later (Freedman, 1996; Pettigrew, 1985). They have an important IT component, involving an alignment between the organization and the IT system (Galliers, 2011; Gregory et al., 2015), with a high failure rate, as for example, the gurus Michael Hammer and James Champy professed in the 1990's regarding business process re-engineering.

EMBEDDED IN ORGANIZATIONAL PATH-DEPENDENCY

Strategizing, like any economic action, is embedded in structures of social relations (Granovetter, 1985; Nee & Ingram, 1998). It is embodied by specific actors who act according to routines and habits that have emerged from the preceding historical processes (Nelson & Winter, 1982). Actions of routinization create inertia by entrenching the organization and creating rigid patterns (Besson & Rowe, 2012). Inertia occurs at different levels of analysis (individual, group, organization or industry) and takes different forms (socio-cognitive, psychological, socio-technical, economic, and political) (Besson & Rowe, 2012; Hodgkinson & Wright, 2002; Omidvar et al., 2022). As strategizing occurs during organizational transformation, such inertia leads to a path-dependency effect that makes it difficult for organizations to realign themselves with their environment (Sydow et al., 2009; Vergne & Durand, 2010), which explains the failures of the abovementioned transformation projects.

PRODUCED BY STRATEGY ACTORS

Strategizing is carried out by specific actors, who are either members of the top management group or middle managers. The top management group first consists of the top management team (TMT), which is responsible for steering the organizational transformation (Hambrick, 1994; Hambrick et al., 1998). It deliberately and consciously accomplishes the transformation through a set or series of actions and interventions to create a momentum for change (Dutton & Duncan, 1987) and by giving sense to lower-level employees (Gioia & Chittipeddi, 1991). To this end, the TMT relies on distributed leadership (Gronn, 2002). In the TMT, the CEO plays a special role as a change leader (Bass & Riggio, 2006; Kotter, 1996). The top management group also consists of the board of directors (Hambrick, 1994), which is responsible for governing the change (Klarner et al., 2022). It can also take over the organization to steer the change (Krause et al., 2022). On their part, the middle managers perform the change by

implementing the organizational transformation and leading the transformation projects (Balogun et al., 2015; Floyd & Lane, 2000). The top management group and the middle managers may be accompanied by consultants, who are responsible for advising on the radical change and the associated transformation to be performed, or for implementing the change, respectively (Alexiev et al., 2010; Ginsberg & Abrahamson, 1991).

Given the embodied objectivity of the actors who construct the strategy (Haraway, 1988), strategizing is built on the actors' understanding of strategic movements, environmental conditions, customer expectations, and so on. In other words, strategizing is constructed on the basis of the partial knowledge of the strategizing actors, who are themselves situated in the organizational transformation and embedded in the organization's path dependency. Actors enact the strategy through improvisation, innovation, adaptation of work routines, considering the everyday contingencies, breakdowns, exceptions, opportunities, and the unintended consequences they encounter (Orlikowski, 1996), enabling novel strategies based on the organizational learning of strategy by doing (Jung et al., 2023).

UNFOLDING FOLLOWING A PROCESS

Given the turbulences of the environment, the process of strategizing is non-linear and recursive (Van De Ven & Poole, 1995). Its pace varies to make the transformation happen (Fredberg & Pregmark, 2022). Strategizing unfolds in successive episodes, as the turbulence changes the strategic direction of organizational transformation (Chakrabarti, 2015). One episode ends and leads to another one when there is a turnover of top executives (Wiersema & Bantel, 1993), when there are changes in coalitions among top executives (Denis et al., 2001; Ma & Seidl, 2018), and so on. Indeed, according to the upper echelons theory (Hambrick & Mason, 1984), any demographic change at the top of the organization leads to new strategizing. It has an impact at the level of transformation projects, by finishing, redirecting, or starting a new transformation project.

CONSTRUCTED THROUGH MEANING

During strategizing episodes, actors create meaning through their interactions. Given the organizational path-dependency, actors begin a strategizing process with their own preconceptions of the strategic direction they should take. However, as the strategizing process unfolds, meaning is created among actors through the constitution of coalitions. As Huff et al. (1992) recognized, there are *“tensions between voices for change and other conservative voices that typically argue for a renewed commitment to find adaptative solutions within the framework of current strategy”* (p. 62). These tensions manifest themselves at different levels

of the organization with interpersonal conflicts and agreement-seeking toward consensus (Knight et al., 1999; Pitcher & Smith, 2001), debates (Simons et al., 1999), or disagreements (Samba et al., 2018). The resolution of tensions leads strategic actors to make their cognitive frames resonate with others by mobilizing action in their favor (Kaplan, 2008).

PUTTING IT ALL TOGETHER TO DEFINE STRATEGIZING

Based on these different characteristics, we define strategizing as *the process by which strategy actors deliberately transform their organization to realign it with its environment by formulating and implementing a strategy through meaning-making during transformation projects*. To enrich our understanding of strategizing from a practitioner's perspective, we now draw on the reflection-on-action of consultants, as developed below.

METHODS

RESEARCH SETTING

To conduct this research, we followed the legacy of Kurt Lewin by adhering to the belief that one cannot understand a system without changing it (Schein, 1999). To understand how strategizing works, we focused on transformation projects, relying on the reflections of junior consultants who undertook three waves of transformation projects in 2021, 2022, and 2023. While we relied on the 22 projects of the year 2021 to experiment and nurture this research procedure, the data of this research come from the 19 projects of the year 2022 and the 25 of the year 2023². The research procedure involved assessing, conducting, and reflecting on the transformation projects, as developed below.

Assessing the transformation projects

Between September and December of the year prior to the conduct of the transformation projects, we contacted the organizations to provide them with junior consultants who would participate in their transformation projects for two days a week for four months between January and April. The pitch to the organizations was the following: *“Use the energy, expertise, and creativity of [junior consultants] to help you carry out your transformation projects in France and on the international scene”* (leaflet, 2023). The consultants are in training: they perform the assignments as part of their master's studies at a French business school specializing in strategy and consulting. They come from different countries (half of them from Europe, the rest from Asia, Africa, and America), have different academic backgrounds (business, economics, engineering, law, social sciences, etc.) at bachelor or master level, and have at least 6 months

² For the purpose of this communication, as projects from year 2023 are ongoing, we only analyzed data of year 2022.

of professional experience (internship, previous job). After graduation, they pursue a career in strategy (strategy departments of small to large corporations, including NGOs) or consulting (all types of management consulting firms) around the world.

We provided the consulting services to organizations free of charge. The rationale was first to suppress potential barriers to entry to access a wide range of organizations, including NGOs (e.g., charity organization, mission 25, 2023), and second to put less pressure on consultants to succeed. The downside is that offering consulting for free suppresses the price levers that consultants can use to access people and information and get their recommendations heard. In practice, despite being free, the consulting missions provided junior consultants with an understanding of the strategizing that occurs during organizational transformation, which meets our research objective.

During their consulting projects, the consultants worked with their clients without the supervision of a professional manager. We wanted them to reflect on their experiences of organizational transformations themselves, without the bias of experienced consultants whose corporate culture is strong (Rasiel, 1999). Although the junior consultants were not directly supervised, the authors regularly followed the assignments (see below) and could interact with the organizations as needed. For example, during an internationalization project, the junior consultants encountered difficulties in dealing with their clients. One of the two authors intervened. This led to the early termination of the transformation project (Mission 11, 2022).

We assessed each mission to ensure that it was a transformation project, in the sense that it transformed the deep structure of the organization or the business unit in which it was carried out (Besson & Rowe, 2012). To this end, we provided potential clients with a two-page document (mission title, context, potential deliverables, key performance indicators, and consultant benefits) that we discussed with them prior to the mission. For example, in 2022, it led to discarding an entrepreneurial mission that aimed to launch a new service for an organization operating in the fast-moving consumer goods industry because it did not transform the organization. In 2023, it led to discarding missions that lacked a strategizing focus because the scope of the mission was too broad, or the organization was too young to have a path-dependency effect. In contrast, we typically retained missions focused on changing organizational processes or addressing the firms' strategic choices (e.g., international strategy, growth strategy), and evaluated missions of all types (formulation, implementation, evaluation, or control). Once both parties validated the content of the assignment, we assigned groups of two to four junior consultants to each mission, depending on the tasks. As far as possible, we

tried to form homogeneous consulting teams (nationality, academic background, previous experience, etc.).

The conduct of the transformation projects

The 44 transformation projects of 2022 and 2023 occurred in different industries as diverse as airlines, automobiles, charities, healthcare, insurance, and media. While 84% of the missions occurred in France, others occurred in Europe (Belgium, Germany, the Netherlands, Switzerland), Cambodia, the Ivory Coast, and the USA. The organizations ranged in size from small (SMEs) to medium (mid-sized) and large (e.g., CAC40, SBF120) and were corporate or NGO. The projects were sponsored by the top management group or the middle management, either at the C-level (i.e., chief executive officer, chief strategy officer...), senior vice presidents, or business units/departments heads. We divided the transformation projects into different themes, with some recurrence in 2022 and 2023, such as optimization and processes, business model development, implementation of corporate social responsibility, or development of a growth strategy. In 2022, 42% of the projects are related to strategy formulation, 63% to strategy implementation, and 5% to strategy evaluation and control. Because the total is more than 100%, some missions spanned different steps of the strategy process. For example, strategy evaluation and control occurred in one project where the consultants first participated in the implementation (Mission 3, 2022). Appendix I provide details of each mission.

The transformation projects unfolded as follows. In December, before the start of the project and after the project assessment, the junior consultants were assigned their assignments and had to contact their clients to organize a first contact (phone, videoconference or meeting). The objective was to establish the client-consultant relationship, acquire an understanding of the assignment, exchange useful documents, and prepare a preliminary calendar of expected deliverables for the mission. In early January, the consultants then began their consulting assignments by presenting their expected progress. This was usually challenged and revised in subsequent meetings, for example by adding unexpected deliverables (e.g., analysis of additional countries, Mission 11, 2022), rearranging workflows, or making changes to make the calendar more realistic. In parallel, whether the mission involved strategy formulation, implementation, evaluation, or control, the consultants usually began collecting data. For example, this included site visits with interviews (Mission 6, 2022), expert testimonies (Mission 2, 2022), or secondary data collection (Mission 12, 2022). For some missions, clients also asked consultants to provide them with a preliminary strategic analysis of their organization (Mission

11, 2022). In all projects, this first step usually helped the junior consultants to better understand their subject matter and the clients to test the consultants' skills. The next step was to implement the project, usually in collaboration with the client's organization. For example, for a strategy implementation project involving process reengineering, it led to its redesign (Mission 3, 2022). For a strategy formulation mission aimed at exploring new industries in which the company could diversify, it involved the construction of business cases to build scenarios (Mission 12, 2012). The final step of the missions involved either the presentation of the strategy formulation to clients (Mission 13, 2022) or to the organization's executive committee (Mission 14, 2022), or the implementation of the strategy, such as the creation of an inbound marketing process (Mission 16, 2022).

When the transformation projects were located in France, the consultant-client relationships typically involved a mix of face-to-face and distance interactions, with interactions ranging from weekly or bi-weekly to less regular meetings (e.g., Mission 15, 2022). For the missions that took place abroad, either the junior consultants traveled to the foreign office once or twice, or the client came to France once or more. For one mission, the relationships remained online (Mission 9, 2022). At the end of the missions, we asked clients to evaluate the consultants and comment on their work. For example, one consultant received the following comment: *"very good understanding of our company's problem"* (Mission 17, 2022), while another received *"the mission was a success [...] in several aspects: the technical quality of the deliverables and the regular meetings with the client, [...]"* (Mission 6, 2022). Overall, except for the prematurely resumed 2022 mission, which received neither a grade nor feedback from the client (Mission 11, 2022), the work performed satisfied the clients. For example, in one mission (Mission 6, 2022), after the mission was completed, the client asked the junior consultants to submit a proposal for another mission. In addition, a fourth of the 2023 missions were conducted with organizations for which the junior consultants had previously worked in 2022.

Reflecting on the transformation projects

To improve our understanding of strategizing, we drew on the reflections of junior consultants on organizational transformation projects (Schön, 1983). Based on the assumption that practitioners are knowledge producers, Schön (1983) argued that they can either reflect-in-action, i.e., they reflect on what they do during their practice, which means that they become researchers in their practice context, or reflect-on-action, i.e., they reflect on what they have done after the fact, by rigorously analyzing their actions, as the junior consultants did for this research project. Such reflexivity helps them not only to understand how they act but also why

they act the way they do, and ultimately leads them to change their practice by developing double-loop learning (Argyris & Schön, 1974).

To benefit from the junior consultants' reflections-on-action, we minimized our relationship with the organizations (i.e., project assessment and grading), thus avoiding the "contamination" of the study by the researchers, and placed the embedded junior consultants in the position of "instruments" of the study, benefitting from their candid observations and understandings, without bias from us or experienced consultants (Bernstein, 2012). While previous research has collected data from embedded actors through self-report diaries (Balogun, 2011) or the recording of observations (Bernstein, 2012), we relied on practice groups, organized every two or three weeks in parallel with the missions, during which the junior consultants regularly reflected on their strategizing.

The practice groups brought the consultants together in groups of three to four transformation projects according to their mission themes and one of the authors of this article. The goal was to improve the consultants' understanding of the ongoing organizational transformation. To this end, we asked the consultants to reflect on their ongoing mission, which led to discussions, questions, and debates to generate a conversation with the professor and the other consultants facing similar situations in their own field missions (Baker et al., 2005). During the initial practice groups, the consultants reflected on the expectations of the project and how they had organized themselves to perform the project. They then reflected on their ongoing work and the difficulties they encountered in the conduct of the project. In later practice groups, they reflected on their learning and understanding of the ongoing organizational transformation. Typically, discussions moved from topics related to data collection, software use, etc. to topics related to the client-consultant relationship, political aspects of the project, etc. Our role as academics was to help the consultants develop and explain their own theory-in-use. To this end, it relied on maieutic and questioning (see a comparable example in Schein, 1999).

At the end of the learning process, we asked each group of consultants to summarize their learning in a two-page memo describing the context of their mission, their performance, and their lessons learned, both in terms of consulting and organizational change. To ensure the quality of their work, we graded the consultants based on their ability to understand what they were doing during their consulting project. Overall, the work was of good quality and fulfilled well the learning objective we had in mind, which was to "[...] *demonstrate behavioral skills in different professional environments*" (internal document, 2023). For example, even the

consultants whose mission was resumed could reflect on their situation from the perspective of organizational transformation (Mission 11, 2022).

DATA COLLECTION

Throughout the research, as described above, we collected several types of data. First, we collected the 2-page project evaluation document written by the client and discussed with the authors. It contains the initial expectations regarding the role of the consultants in the transformation projects. Then, we collected each PowerPoint presentation that the consultants presented when they reflected on their practice and took notes during these practice group meetings. These data help to understand the evolution of the consultants' reflectivity regarding their strategizing during the transformation. We also relied on the consultants' two-page memos, in which the consultants express in their own words their theories-in-use regarding organizational transformation strategizing (Schön, 1983). Finally, we collected the comments accompanying the client's evaluation. For some assignments, we also took notes on their follow-up when we had the client on the phone for a debriefing.

DATA ANALYSIS

To improve our understanding of how practitioners strategize organizational transformation, we relied on grounded theory methods (Glaser & Strauss, 1967). The first step in the analysis involved conducting a preliminary analysis to assess the scientific feasibility of the research project and its relevance to practice. Building on the 19 missions of 2022, this involved the writing of a 32-page white paper on the topic of organizational transformation, which we largely distributed to our professional network. As the feedback we received evaluated this first step of analysis, we continued our research, and for the second step, we relied on the "Gioia method" by systematically analyzing the consultants' 2-page memos (Gioia et al., 2013). Since the focus of the memos was on consultants' insights regarding the conduct of the organizational transformation strategizing, we were able to acquire a good understanding of the practitioners' perspective through open coding. For example, in one transformation project (Mission 6, 2022), the consultants explained that they understood that they were being used as "*messengers*" of the department head to communicate the ongoing transformation. We developed this idea under a first-order category that we labeled "creating awareness". By cycling through the codes and comparing them, we eventually identified recurring codes that we collapsed into 12 first-order categories. Drawing on the other types of data collected (project mission sheets, presentations, notes from the presentations and discussions, and comments from clients on the missions), we refined and rearranged the codes to stabilize them.

In the third step, we sought relationships among the first-order categories to understand the practitioners' understanding of organizational transformation strategizing. While some codes were related to the context of the organizational transformation, others were related to the transformation, but in contrasting ways. On the one hand, some were related to the content of the strategy under construction (e.g., “discovering new knowledge”); on the other hand, some were related to the execution of the project (e.g., “acting with agility”). This led to the identification of three additional themes: “context of organizational transformation”, “deploying a strategy”, and “steering strategy projects”, respectively. These three second-order themes relate to organizational transformation strategizing, as illustrated in Figure 1.

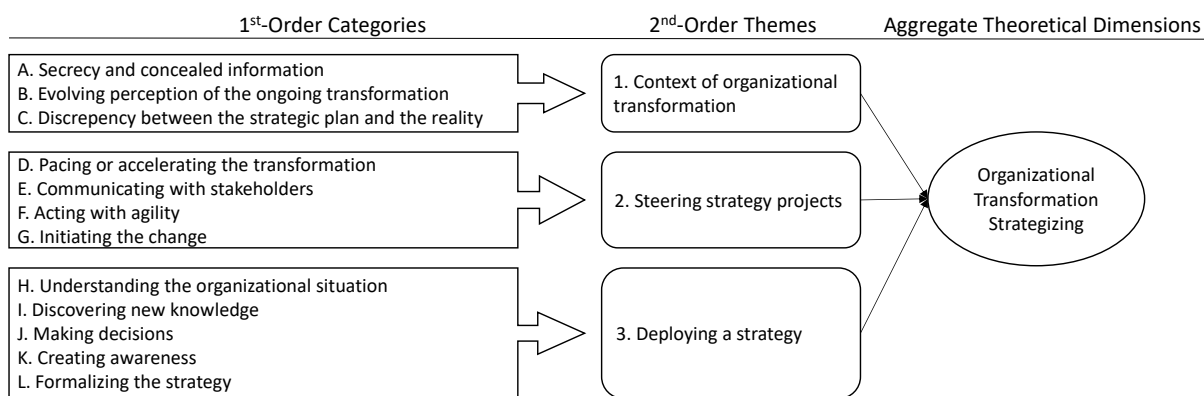


Figure 1: data structure

Finally, in the fourth step, we used the three second-order themes to build preliminary models. We refined them over several iterations, returning to theory and data from time to time, until we arrived at our final process model. To assess its accuracy, at the end of the 2022 missions, we invited six consultants to present the findings of six of the 19 randomly selected 2022 missions to an audience of students. By questioning this panel for an hour and acquiring insight from the audience's questions, we were able to assess the accuracy of our model, which is shown in Figure 1 and detailed in the next section.

THEORIES-IN-USE ON STRATEGIZING TRANSFORMATION

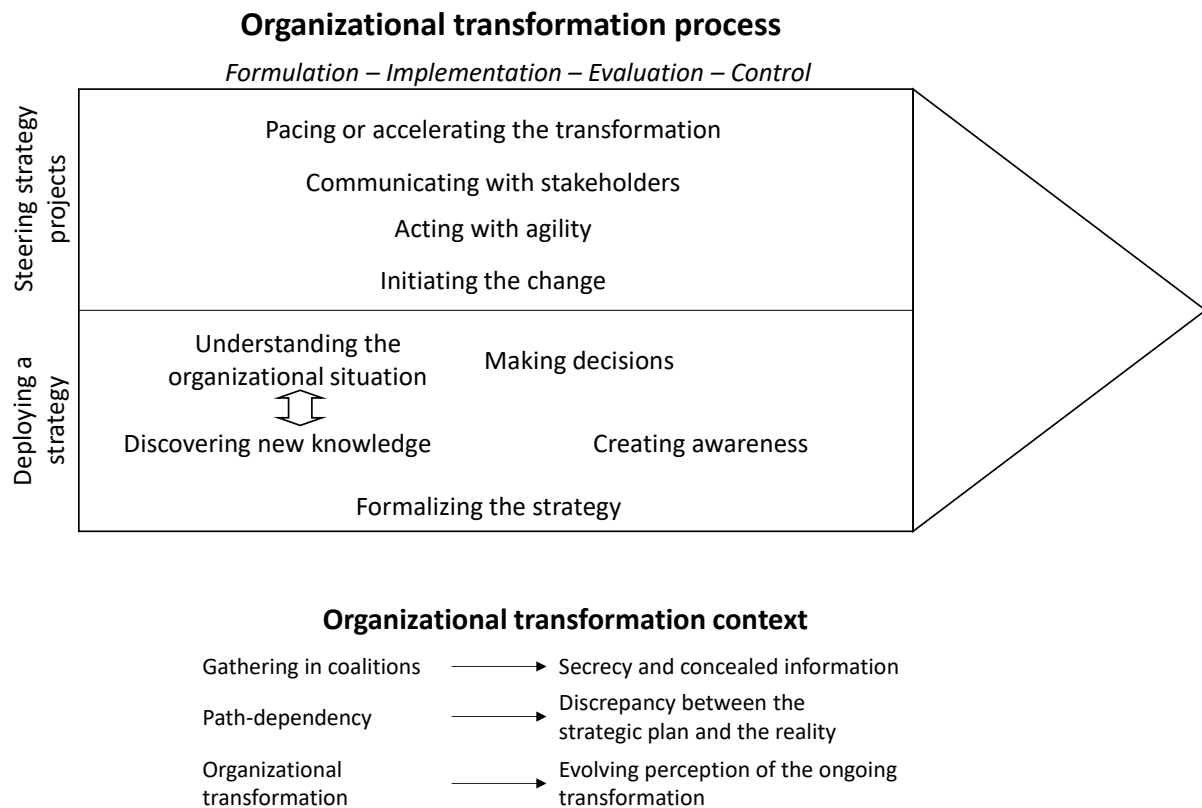


Figure 2: Organizational transformation strategizing

ORGANIZATIONAL TRANSFORMATION CONTEXT

The consultants highlighted three contextual elements that had implications in the conduct of their strategizing: the secrecy surrounding the transformation and the presence of concealed information, the discrepancy between the strategic plan and the reality, and the evolving perception of the ongoing transformation.

Through their reflections, by noting not pieces of information remained concealed, the junior consultants first observed that organizational transformations are rife with secrecy. For instance, during a mission that aimed at optimizing the cost structure of the department of an energy distribution company, the consultants *“discovered that the client had not told [them] everything about the issues of the company”* and that he *“let [them] find it by [them]selves because he could not tell [them] everything regarding the context of [their] mission”* (Final memo, mission 6, 2022).

The consultants explain it by the fact that *“not all the people within the [department] management team agree with the [strategic direction]”* (ibid.). They continue by explaining that *“[t]here is a need to create a guiding coalition for the [department] to make its 2035 strategic plan come true.”* (ibid.) As this transformation project illustrates, the secrecy

surrounding the project come from the coalitions that have developed during the organizational transformation. It has an impact on strategy actors, here the junior consultants involved in the project, who must deal with hidden pieces of information.

The consultants also reflected on the discrepancy between the strategic plan and the strategic reality. It was particularly striking in a transformation project conducted for a biotechnology company, where the consultants began their memo as follows:

The first element that catches our attention throughout this project is the difference between the understanding description of the mission and how we understand what is at stake now. (Final memo, mission 2, 2022)

As this excerpt illustrates, while the mission was formulated in a specific way in December of the year before the mission, several months later the formulation has drifted due to changing priorities. This document materializes in transformation projects an element of inertia inherent in strategizing, as it creates a gap in understanding between what was originally planned and the reality of organizational transformation. This inertia led to delays at the beginning of the missions, misunderstandings, etc.

Finally, the consultants reflected on the evolving perception of the ongoing transformation. The focus here is not on how the strategy actors lag in their understanding, but rather on how they learn and understand the transformation as it unfolds. For example, in their engagement with an appliance, electrical and electronics manufacturer to develop a new business model for a new market segment, the consultants reflected on the evolution of the engagement as follows:

The topic was quite complex and very broad as it originally covered all segments [...]. We ended up narrowing the scope of our mission to focus on [one] segment [...]. (Final memo, mission 7, 2022)

During transformation projects, strategy actors, here the junior consultants, increase their perception of the organization's transformation as the organization transforms itself. The consultants working for an automotive company confirmed this perception by reflecting that *"throughout our mission, we were able to have a very clear vision of the real issues behind [the company's] problem."* (Final memo, mission 18, 2022). The discussions and debates occurring during the practice group sessions confirmed that this perception is not only inherent to the consulting activity, which implies that consultants learn about the industry during a consulting mission. In fact, the junior consultants explained that learning also occurred for the other strategy actors involved in the projects, especially their clients.

ORGANIZATIONAL TRANSFORMATION PROCESS

The consultants reflected on a dual process that occurred in the transformation projects they led: one process through which strategy actors deployed a strategy, and another through which they steered strategy projects.

Deploying a strategy

In the organizational transformation projects, the strategy actors first reflected on the fact that they were simultaneously seeking to understand the organizational situation and to discover new knowledge. For example, in the mission to develop a new business model for a new market segment in the appliance, electrical, and electronics manufacturing industry, the strategy actors described these two concurrent activities in the following sequence:

[O]ur first task was to ask as many questions as possible to understand the issue, the limitations, and what the client wanted us to do. Then there was the phase of collecting as much data as possible to better understand the issue and design a strategy to succeed in our mission. (Final memo, mission 7, 2022)

For other projects, such as one operating in the automotive industry (Mission 17, 2022), the two processes are perceived as pursued in parallel. In any case, going back and forth between the organization's understanding and insights from the environment is important *"to offer a solution that is aligned with the company's strategy and be confident that it will be adopted"*, as expressed by consultants in the memo that reflects a project aimed at constituting a reporting of the carbon footprint of a French broadcast media production and distribution company (Mission 13, 2022).

In their reflections, the consultants also noted that the deployment of a strategy involves decision-making. Even though the consultants did not make the decisions themselves, which is the specificity of this type of consulting work, most of the formulation of strategy projects led to a decision, such as a go/no-go decision, as for Mission 1 of 2022 in a biotechnology research environment. For the implementation projects, the deployment of the strategy involved raising awareness among the various stakeholders of the transformation project. For example, in a transformation project conducted for an insurance company, the consultants expressed the following:

Our contribution was to make [the directors] aware that there were ways to prevent a lot of the delinquency by making specific decisions for the delinquent populations. (Final memo, mission 19, 2022)

For another project (Mission 6, 2022), the consultants perceived themselves as *"messengers"* of the department head to communicate the ongoing transformation within the department.

Finally, we found that the deployment of a strategy involves its formalization, both in terms of structure and method. In the case of the above-mentioned transformation project for an insurance company (Mission 19, 2022), this involved clarifying the roles and responsibilities of the owners of the process they were working with, while in other projects it involved the creation of clear reports (Mission 16, 2022), the definition of key metrics (Mission 14, 2022) or, more generally, the presentation of results (Mission 1, 2022).

Steering strategy projects

Reflecting on their consulting engagements, the consultants first explained that steering strategy projects involves pacing or accelerating change. In the case of a mission in the biotechnology industry, the consultants explained that they needed to accelerate change in order to find a new growth opportunity before the Covid-19 was over:

We [...] had to study other markets to find a solution to mitigate the Group's potential loss. If the Covid crisis has allowed the Group to maintain a comfortable level of profitability in its core activity, a solution must be found and implemented in the coming years when the profits from Covid-19 will be reduced. (Final memo, mission 2, 2022)

While this example illustrates the need to accelerate, as in the case of first-mover advantage (e.g., Mission 7, 2022), it may also be necessary to decelerate change in some transformations. The consultants also reflected on the need to communicate with stakeholders to manage projects. At the conclusion of their transformation project, the consultants involved in an internationalization project for a business consulting and services organization explained in their final memo the following:

Throughout the mission, we provided efficient and smooth communication with the client to have a better understanding between each other and manage a good relationship with the client. (Final memo, mission 14, 2022)

As the consultant who were involved in a post-merger integration of an IT Services and IT consulting firm confirm, “[w]e acted as a link between these two companies, both in terms of output/deliverables and people” (Final memo, mission 16, 2022). For both projects, steering involved communicating with the different stakeholders to the project, whether it is the clients in a client-consultant relationship, or a broader perspective as illustrated with a post-merger integration.

A third characteristic of steering transformation projects, as reflected by the consultants, was the need to be agile. For example, in the project conducted for a biotechnology organization (Mission 2, 2022), the consultants explained the following:

Our short-term focus and priorities changed a couple of times, and we had to adapt our plan to fit those changes. Being flexible with a changing environment is important and necessary. (Final memo, mission 2, 2022)

The consultants explain that this agility is necessary in the turbulent environment in which the organization is operating and in which all transformation projects are embedded.

Finally, the consultants explained that their role as strategy actors is to initiate the change, as in the case of internationalization for a business consulting and services organization:

[w]e need to have enough power to drive the mission direction and take the responsibility to help the client in decision making. The workshop that happened at the end of the mission was exactly a good way on decision making, meanwhile it was a good interaction with the client as well. (Final memo, mission 14, 2022)

In this case, the consultants explained that such an initiative could take place, for example, by organizing a workshop. Other examples include expanding the scope of the analysis, making recommendations for improving processes, changing the course of the transformation project, etc.

DISCUSSION AND CONCLUSION

In this article, we have demonstrated that strategizing unfolds within an organizational transformation context and that it is inscribed through the deployment of a strategy and the steering of strategy projects. These findings offer implications for understanding the root cause of strategy openness and for enriching our understanding of the strategy process.

UNDERSTANDING THE ROOT CAUSE OF STRATEGY OPENNESS

Previous research has analyzed the changes in the field of strategy that followed the shift in strategic planning from the perspective that strategy has opened up (Splitter et al., 2023; Whittington, 2019; Whittington et al., 2011). In this article, we show that what characterizes strategizing is not so much that the process is more open than it used to be, but rather that it operates at the project level. For example, previous research focused on the emergence of agile initiatives in organizations (e.g., Stjerne et al., 2022). By being drastically different from strategic planning-oriented ways of doing strategy, and thus “drifting” from the strategy process, as the authors argue, it illustrates that strategizing currently operates at the project level, is led by strategy actors at the middle-management level and participates in the constitution of the organization’s strategy, as we have defined it in this article. Similarly, we argue that the political dynamics observed when participation becomes open (e.g., Belmondo & Sargis-Roussel, 2022) have less to do with open initiatives and more to do with the political

struggles inherent in ongoing transformations that are particularly visible in open strategy settings. Overall, while the stream of research strives to comprehend and detail the implications of such openness, we explain their emergence: they constitute specific forms of transformation projects, at a lower level than the executive suite, in accordance with the depictions of the 44 transformation projects from this article.

REFINING THE STRATEGY PROCESS

While the long-standing stream of research on the strategy process has focused on how strategic decisions are shaped and implemented (see reviews in Burgelman et al., 2017; Chakravarthy & Doz, 1992; Hutzschenreuter & Kleindienst, 2006), we argue that the perspective offered in this article enhances its understanding. By going back to the history of strategic planning and recalling the discrepancy between strategic planning and strategy making (Mintzberg, 1994), we have shown that the process of strategizing occurs at two simultaneous levels. First, our study has detailed that strategizing occurs within transformation projects and involves the ability of strategy actors to both deploy the strategy and steer the strategy projects in a turbulent organizational transformation context that may involve, for example, project changes or termination as new strategic episodes unfold. Second, although not the focus of our study, our research shows that these projects are chartered and designed in response to turbulence in the environment to constitute a transformation project portfolio. This leads us to conceptualize the strategy process as the addition of these different transformation projects that unfold one after the other to orient the organization within its environment.

While this dual perspective echoes the Bower-Burgelman process model (Burgelman, 1983), which has been enriched over time in the strategy process literature (e.g., Floyd & Lane, 2000; Raes et al., 2011), we complete it based on our strategizing perspective, which puts the emphasis on the anchoring strategizing in organizational transformation. However, more work is needed, first to strengthen the dialogue between these two perspectives, and second to focus on the project portfolio perspective, which was overlooked in this article due to its research design. To this end, a top management group perspective would help to understand the coherence created between these different transformation projects towards the constitution of the organization's strategy.

IMPLICATIONS FOR STRATEGY CONSULTING AND STRATEGY TEACHING

As this article builds on the reflection-on-action of junior consultants, it provides implications for the practice of this activity. While consultants often use transformation as a buzzword (e.g., “digital transformation”), their impression management leaves overlook what they actually do

when transforming organizations (Clark, 1995). The 44 consulting projects studied in this article show that it covers processes of steering strategy projects and deploying a strategy and detail the activities they imply. This article also provides implications for the teaching of strategy. In a companion article, which is under review, we built on the same research setting and showed that the skills necessary for the conduct of strategizing differ from those currently taught, i.e., cased-based teaching, theory-based teaching, or a mix of the two. Specifically, strategizing involves the capacity to interact within the top management group and middle managers and to step back from the ongoing transformation to understand what is at play.

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Appendix I: Description of the transformation missions

#	Mission Theme	Mission Name	Org. Size	Country	Industry	Org. Sponsor
2022						
1	Development of commercial offers	Building a consulting offer	Large	France	Business Consulting and Services	Director
2	Growth strategy	Seeking new market opportunities	Large	USA	Biotechnology Research	Senior Vice-President
3	Optimization & Processes	Development of an automation process	Large	France	Software Development	Director
4	Development of commercial offers	Building a consulting offer	Medium	France	Business Consulting and Services	Partner
5	Development of commercial offers	Building a consulting offer	Medium	France	Business Consulting and Services	Partner
6	Optimization & Processes	Optimization of cost structure	Large	France	Energy Distribution	Department Head
7	Business Model Transformation	Developing a business model to enter a new market	Large	France	Appliances, Electrical, and Electronics Manufacturing	Department Head
8	Business Model Transformation	Building an umbrella brand	Medium	France	Personal Care	Sales Manager
9	Growth strategy	Researching new types of funding	Medium	Switzerland	NGO	Development Director
10	Implementing CSR	Developing a strategy for a specific market	Small	France	Business Consulting and Services	Co-Founder and President
11	Internationalization Strategy	Expanding abroad	Small	France	Software Development	CEO

12	Growth strategy	Investing a new market for diversification purpose	Large	France	Broadcast Media Production and Distribution	Strategy Director
13	Implementing CSR	Reporting carbon footprint	Large	France	Broadcast Media Production and Distribution	Strategy Director
14	Internationalization Strategy	Expanding abroad	Medium	France	Business Consulting and Services	Marketing Director
15	Internationalization Strategy	Expanding abroad	Small	France	Accreditation body	President
16	Optimization & Processes	Creating synergies between a parent firm and its subsidiary	Small	France	IT Services and IT Consulting	CEO
17	Business Model Transformation	Development of a B2C business model	Small	France	Automotive	Vice-President R&D
18	Implementing CSR	Implementing a sustainability vision for employees	Medium	France	Automotive	HR director
19	Optimization & Processes	Re-engineering a billing process	Medium	France	Insurance	Relationship Director
2023						
1	Growth strategy	Positioning an innovative solution on the market	Large	France	Biotechnology Research	Senior Vice-President
2	Optimization & Processes	Transforming the organization toward a consumption business model	Large	France	Software Development	Head of marketing
3	Optimization & Processes	Improving the client experience	Large	France	Software Development	Head of marketing
4	Optimization & Processes	Simplifying the user experience	Large	France	Energy Distribution	Department Head
5	Distribution & Sales strategy	Developing a marketing strategy	Medium	France	Personal Care	Sales Manager
6	Business Model Transformation	Communicating a business model and a strategy to raise funds	Small	France	Software Development	CEO

7	Distribution & Sales strategy	Developing a brand on the French market	Small	France	Retail industry	Managing partner
8	Growth strategy	Developing organically or through external acquisition overseas	Small	Ivory Coast	Business Consulting and Services	CEO
9	Business Model Transformation	Communicating a business model and a strategy to raise funds	Small	France	Food industry	Founder and CEO
10	Implementing CSR	Industrializing a CSR initiative	Large	France	Construction industry	Head of Sustainable Development
11	Implementing CSR	Elaborating the biodiversity strategy	Large	France	Construction industry	Head of Sustainable Development
12	Business Model Transformation	Developing a business model for a technology start-up	Small	Germany	Chemical industry	CEO and managing director
13	Implementing CSR	Conceiving a CSR offer for the banking industry	Medium	France	Business Consulting and Services	Manager
14	Growth strategy	Analyzing the competition and the potential opportunities to grow in the electric mobility market	Small	France	Electric mobility	Business Development director
15	Growth strategy	Developing the organization's strategic plan	Medium	France	Pharmaceutical industry	Director of Strategy
16	Distribution & Sales strategy	Developing the distribution in the USA	Small	France	Gaming industry	CEO and co-founder
17	Distribution & Sales strategy	Developing a sales division strategy	Small	Belgium	Maritime industry	CFO and co-founder
18	Optimization & Processes	Deployment of a tool on a large scale	Large	France	Airline industry	Head of Transformation
19	Optimization & Processes	Optimization and potential extension of partnership with a transversal service provider	Large	France	Airline industry	Head of Transformation

20	Optimization & Processes	Identification of the strength and weaknesses of the current organization for improvement purposes	Large	France	Airline industry	Head of Transformation
21	Optimization & Processes	Rejuvenating an innovation practice by empowering employees	Large	France	Airline industry	Head of Transformation
22	Optimization & Processes	Developing a snapshot of potential innovations within the organization	Large	France	Airline industry	Head of Transformation
23	Optimization & Processes	Scoping a solution for its implementation within the organization	Large	France	Airline industry	Head of Transformation
24	Implementing CSR	Developing a sustainability strategy	Medium	The Netherlands	Construction industry	Consultant
25	Business Model Transformation	Digitalizing the organization's fundraising process	Small	Cambodia	Charity NGO	secretary-general