

# **MANAGING COMPLEXITY IN STAKEHOLDER ENGAGEMENT AND OPEN STRATEGY PROCESSES THROUGH FACILITATION: A QUALITATIVE META- SYNTHESIS.<sup>1</sup>**

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## **Résumé :**

As open strategy and stakeholder engagement gain prominence, organizations face growing complexity in managing participation, inclusion, and legitimacy. This paper explores how facilitation can address these challenges through a qualitative meta-synthesis (QMS) of 25 peer-reviewed case studies on open strategy. Five key practices—developing process guidance, facilitating accessibility, building legitimacy and buy-in, encouraging procedural openness, and organizing group dynamics—are identified as critical for managing openness. These practices are synthesized into three overarching constructs: structure, neutrality, and purpose. The study positions facilitation as a strategic capability that enables organizations to calibrate openness dynamically, aligning participatory processes with strategic coherence. By bridging open strategy with stakeholder engagement and collaborative governance literatures, this paper extends current theorization and highlights the importance of institutionalizing facilitation. It concludes by proposing future research avenues on the role of facilitators as boundary spanners and the governance of openness across organizational contexts.

**Mots-clés :** Open Strategy, Stakeholder Engagement, Facilitation, Qualitative Meta-Synthesis

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# **MANAGING COMPLEXITY IN STAKEHOLDER ENGAGEMENT AND OPEN STRATEGY PROCESSES THROUGH FACILITATION: A QUALITATIVE META- SYNTHESIS.**

## **1. INTRODUCTION**

Open strategy is a recent research topic within the field of strategic management, which has gained thrust amongst academics over the last decade. While inclusion and transparency are not new to strategic management, societal and organizational changes have reinforced the move toward more openness (Seidl et al., 2019).

As the literature is still nascent, numerous factors influencing the level of openness in open strategy initiatives are being discussed, brought to light, and refined. Recent studies have debated who participates in open strategy (crowds vs. communities), how decisions are made, and what role technologies play (Hautz et al., 2017; Dobusch & Kapeller, 2018; Morton et al., 2017). Openness has also been associated with benefits such as collective intelligence, legitimacy, and sense-making across organizations (Bjelland & Wood, 2008; Seidl & Werle, 2018). Yet, literature also highlights dilemmas such as process, commitment, disclosure, empowerment, and escalation (Hautz et al., 2017).

In response, this article aims at further exploring the dynamics of openness in open strategy initiatives and poses the following research question: How can organizations manage the complexity of openness in their strategy-making processes? Therefore, this paper develops a qualitative meta-synthesis (QMS) of 25 peer-reviewed journal articles. A meta-synthesis has the ability to build theory through the consolidation of primary studies and can thus help in either extending, refining or generating theory (Hoon, 2013, p. 527), focusing as much on the

“what.” “how,” and “why.” QMS is appropriate for studying an individual or a process, which motivates its use for the analysis of open strategy processes and its stakeholders. Rooted in the strategy-as-practice approach, this article aims at taking a deeper dive into strategy practitioners (“actors who shape the construction of practice through who they are, how they act and what resources they draw upon” (Jarzabkowski et al., 2007, p. 8), thereby contributing to the understanding of strategy as a profession (Whittington et al., 2011).

The article will first offer an overview of the methods used for the QMS, how relevant literature was identified and selected and how the data was coded, extracted, and used. This paper first consolidates theory on open strategy by coding and analyzing 25 case studies with existing constructs of the literature, developing a consolidated reading of open strategy processes and the complexities that arise from them. Second, open strategy constructs are extended by exploring more deeply how organizations can manage the complexities, bringing forward five constructs (Encouraging procedural openness, organizing group dynamics, developing process guidance, facilitating accessibility, and building legitimacy and buy-in). Then, the notions of structure, neutrality, and purpose are presented in a model and are discussed as being an answer to why organizations struggle with openness and, thus, extending theorization on open strategy and bridging these findings with stakeholder engagement literature. This model allows to move beyond the traditional elements of inclusion and transparency and suggests structure, purpose, and neutrality to be considered instead in crafting, guiding, and analyzing open strategy. The article brings forward the role of facilitators and facilitation in open strategy initiatives and stakeholder engagement as means to manage the identified complexities. Finally, as a conclusion, future research paths are suggested.

## **2. THEORETICAL BACKGROUND**

### **2.1. AN OVERVIEW OF OPEN STRATEGY**

Chesbrough and Appleyard (2007) used the term “open strategy” for the first time in their paper linking open innovation to strategy and is now commonly defined through the notions of inclusion and transparency (Whittington et al., 2011, p. 532). Both constructs could extend beyond the boundaries of the organization such as is the case with open innovation (Chesbrough & Appleyard, 2007) contrasting with traditional top-down strategy making (Barney, 1991; Birkinshaw, 2017; Chandler, 1962). Open strategy is not a binary phenomenon but rather a continuum, where open strategy processes can be more or less open in both inclusion and transparency (Whittington et al., 2011).

Inclusion and participation—though often used interchangeably—reflect different levels of stakeholder engagement in strategy. Participation refers to contributing information or ideas, while inclusion entails sustained interaction and involvement in decision-making (Mack & Szulanski, 2017; Quick & Feldman, 2011).

Open strategy initiatives often favor factual and temporal openness, but struggle with social openness—i.e., including diverse groups beyond internal actors (Dobusch et al., 2017). These openness dimensions are often interdependent and difficult to balance in practice (Dobusch et al., 2017).

Regarding this aspect, we rely on Dobusch et al.'s (2019) two-dimensional framework—content-related and processual openness—defined by access to sensitive information, participation modes, and decision-making modes. Processual openness is about setting the rules and procedures upfront to avoid individuals to make changes during the process. Closure is unavoidable; enabling certain forms of openness requires complementary forms of closure (Dobusch et al., 2019). When moving through openness and closure, several dilemmas emerge, such as the dilemma of process, commitment, disclosure, empowerment, and escalation (Hautz et al., 2017), which often result in exclusionary practices to lower the levels of openness and lower the tensions arising from these dilemmas. In numerous cases in the

literature of open strategy, the accent has been set on “including” the highest number of people within the process (Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together. As these open strategy initiatives emerge, even with the sincere commitment and will of opening strategic processes, there comes an end to the process itself and its openness, even though the ongoing nature of openness remains understudied in the open strategy literature.

While open strategy has traditionally emphasized transparency and inclusion, its practice overlaps substantially with the stakeholder engagement literature, particularly in how both fields address participation, legitimacy, and relational dynamics.

## **2.2. STAKEHOLDER ENGAGEMENT AND THE CHALLENGES OF OPENNESS**

Stakeholder engagement refers to the ways in which organizations involve individuals and groups who affect or are affected by their activities (Freeman, 1984). While traditionally framed as part of corporate social responsibility, recent research has emphasized its strategic dimension and its overlap with participatory governance (Kujala et al., 2022; Ghodsvali et al., 2019). Engagement mechanisms vary in intensity and intent—ranging from information sharing to co-decision-making—and involve tensions between inclusion (who participates), participation (how they participate), and democracy (why they have the right to participate) (Mori, 2010; Noland & Phillips, 2010).

These tensions are also central to the literature on open strategy, where opening up the process to internal and external actors raises issues of legitimacy, control, and empowerment (Hautz et al., 2017; Whittington et al., 2011). While open strategy emphasizes transparency and idea generation, stakeholder engagement focuses more explicitly on moral obligations, such as fairness, recognition, and the protection of vulnerable voices (Kujala et al., 2022). This ethical dimension introduces what some authors call the “dark side” of participation, where inclusion may be symbolic or manipulated, reinforcing asymmetries rather than correcting them.

Moreover, both literatures converge on the challenge of polyphony—the coexistence of multiple, potentially conflicting voices within strategic processes (Wenzel et al., 2022). Managing polyphony requires not only structural tools but also relational and interpretive work, aligning closely with the concept of facilitation. This theoretical bridge justifies examining how organizations actively manage openness and engagement dynamics, and positions facilitation as a key process capability in open strategic contexts.

Stakeholder engagement not only raises questions about inclusion and legitimacy, but also brings into focus the need for processual coordination—a space where facilitation becomes central. Managing divergent expectations, participation modalities, and stakeholder dynamics requires structured yet adaptable facilitation efforts.

To move from ad hoc stakeholder involvement toward a more deliberate architecture of inclusion, the lens of collaborative governance offers useful insights. It emphasizes the institutional and procedural conditions under which diverse actors can jointly make decisions—conditions that facilitation directly supports.

### **2.3. TOWARDS A GOVERNANCE PERSPECTIVE ON OPEN STRATEGY**

Beyond the fields of open strategy and stakeholder engagement, this paper also builds on insights from the literature on collaborative governance (Ansell & Gash, 2008; Emerson et al., 2012), which focuses on how diverse stakeholders collectively make decisions, particularly in contexts of complexity, interdependence, and resource asymmetry. Collaborative governance highlights the importance of procedural fairness, shared motivation, and principled engagement—dimensions that resonate strongly with the complexities of openness in strategic processes. Integrating this lens allows us to frame open strategy not only as a question of inclusion and transparency, but also as a challenge of governance design and coordination among heterogeneous actors.

Building on this, we propose that managing openness in strategy-making may require attention to governance-related dimensions such as procedural structuring (Ansell & Gash, 2008; Emerson et al., 2012), power neutrality (Kujala et al., 2022; Mori, 2010), and purpose alignment (Bryson et al., 2014; Freeman, 1984)—themes that have emerged in both stakeholder engagement and collaborative governance literatures.

While this paper does not start from a predefined framework, these insights provide analytical lenses through which to better understand how organizations navigate the complexity of openness. As the following meta-synthesis will show, these governance themes surface consistently across cases and offer a useful bridge between open strategy and broader theories of collaborative organizing.

Despite rich insights from both open strategy and stakeholder engagement research, the role of facilitation remains under-theorized. There is a need to better understand how facilitation practices can help organizations navigate the tensions of openness, manage group dynamics, and align diverse stakeholders around evolving strategic purposes.

### **3. METHODS**

To examine the research question, this paper adopts the approach of a meta-study. A meta-study can help to clarify contentious issues, resolve arguments and debates, and identify unexplored emergent properties and dimensions of organizational forms (Point et al., 2017, p. 187). In this study, the method of qualitative meta-synthesis is employed. In contrast to the more common meta-analysis used to review literature from a quantitative perspective, QMS helps scholars systematically review primary qualitative research, allowing concepts to be linked across studies with the purpose of integrating findings and, from this, to generate meaning, make sense, detect higher-order organizational phenomena, and/or build further theory (Point et al., 2017, p. 187). A QMS, where the database of the study consists of the findings of a sum of qualitative studies, provides a third-level interpretation aimed at pushing

forward knowledge or theory on the given object of study, rather than combining studies such as meta-analyses do (Nye et al., 2016). Here, synthesis implies extracting and analyzing insights from primary studies to identify categories and patterns, while preserving the integrity of original studies (Hoon, 2013). The aim is to forge something more complete through the synthesis than what the individual parts bring forward on their own (Suri, 2011).

Originating in healthcare studies (Sandelowski et al., 1997), qualitative meta-syntheses have recently been developing in social sciences and more specifically in management science through studies published in journals such as *Leadership Quarterly* (Athanasopoulou & Dopson, 2018), *Organizational Research Methods* (Hoon, 2013), *Long-Range Planning* (Karhu & Ritala, 2021), *Human Resource Management Review* (Soral et al., 2021), and *International Business Review* (Metsola et al., 2020). This study follows Hoon's (2013) eight-step process and draws on Point et al. (2017) to adapt the approach to the context of open strategy. This method is particularly suited to fields like open strategy, where empirical knowledge is dispersed, and theoretical integration is needed.

### **3.1. IDENTIFYING & SELECTING RELEVANT LITERATURE.**

To build the QMS corpus, we conducted a multi-step search strategy across four academic databases—Web of Science, EBSCO Business Source Complete, ScienceDirect, and Emerald—targeting peer-reviewed journal articles published between 2007 and 2022 in journals ranked 3 or above in the Academic Journal Guide (AJG). This choice reflects the importance of ensuring the quality of primary data in a synthesis (Hoon, 2013). The time frame begins in 2007, which marks the first formal use of the term “open strategy” (Chesbrough & Appleyard, 2007). The following search string was used: Article AND “open strategy” in TITLE OR “strateg\* open\*” in TITLE OR “open\* strateg\*” in TITLE.

We complemented this corpus by manually adding all articles from the 2017 *Long Range Planning* special issue on open strategy and identifying leading contributors in the field



(authors with at least two publications or a review paper). A secondary search using these authors' names and the same terms in all fields, combined with forward and backward citation tracking, expanded the pool to 148 potentially relevant studies. Titles were reviewed to eliminate false positives.

Two final inclusion criteria were applied. First, conceptual alignment: abstracts were screened to ensure that the article addressed open strategy as defined in this study (i.e., involving intentional inclusion and/or transparency in strategic processes), reducing the pool to 56 articles. Second, methodological fit: only qualitative case studies (single or multiple) were retained, in line with QMS recommendations (Hoon, 2013), as these provide context-rich empirical material suitable for inductive synthesis. The selection was guided by the principle of purposeful sampling (Suri, 2011), which emphasizes the value of “information-rich” cases from which a great deal can be learned about issues of central importance to the research objective.

This process led to a final sample of 25 articles, each of which met all three criteria: conceptual relevance, methodological adequacy, and publication quality. The diversity of sectors, organizational types, and geographical contexts among the selected studies supports the analytical generalizability of the synthesis. Table 1 below presents the distribution of the selected journal articles by year and journal.

**Table 1. Distribution of Articles Reviewed**

<b>Years</b>	<b>Journal (number of articles reviewed)</b>	<b>Articles</b>
2003–2005	Journal of Management Studies (1) European Journal of Operational Research (1)	Hjortsø (2004); Regnér (2003)
2006–2010	MIT Sloan Management Review (1) Journal of Management Studies (1) Industrial Marketing Management (1) Journal of Business Ethics (1)	Bjelland & Wood (2008); Harrison et al. (2010); Jarzabkowski & Balogun (2009); Schmitt (2010)
2011–2015	Journal of the Operational Research Society (1) Ecological Economics (1)	Bryant et al. (2011); Denyer et al. (2011); Franken &

	California Management Review (2)	Thomsett (2013); Stieger et al. (2012)
2016–2020	Journal of Management Studies (1) Information Technology & People (1) Long-Range Planning (4) Information & Management (1) Academy of Management Journal (1) Strategic Management Journal (1) Organization Studies (1) IEEE Transactions on Engineering Management (1) The Journal of Strategic Information Systems (1)	(Amrollahi & Rowlands, 2017, 2018; Castelló et al., 2016; Deken et al., 2018; Dobusch et al., 2019; Dobusch & Kapeller, 2018; Gegenhuber & Dobusch, 2017; Luedicke et al., 2017; Morton et al., 2020; Seidl & Werle, 2018; Van der Steen, 2017; Zaggel et al., 2019)
2021–2023	Organization Studies (1) Long-Range Planning (1) Journal of Management Studies (1)	(Diriker et al., 2023; Plotnikova et al., 2021; Splitter et al., 2021)

Given the diversity of organizational contexts, sectors, and objectives across the 25 selected case-based studies, a potential heterogeneity bias could be raised. However, this variation was deliberately embraced within the logic of purposeful and theoretical sampling (Suri, 2011), which is consistent with qualitative meta-synthesis and grounded theory principles. Rather than being a limitation, such heterogeneity supports analytic generalization (Hoon, 2013) and enables the identification of cross-cutting patterns that reflect the complex and evolving nature of open strategy initiatives. This methodological choice strengthens the theoretical robustness of the categories developed inductively through the coding process.

### 3.2. DATA ANALYSIS PROCESS.

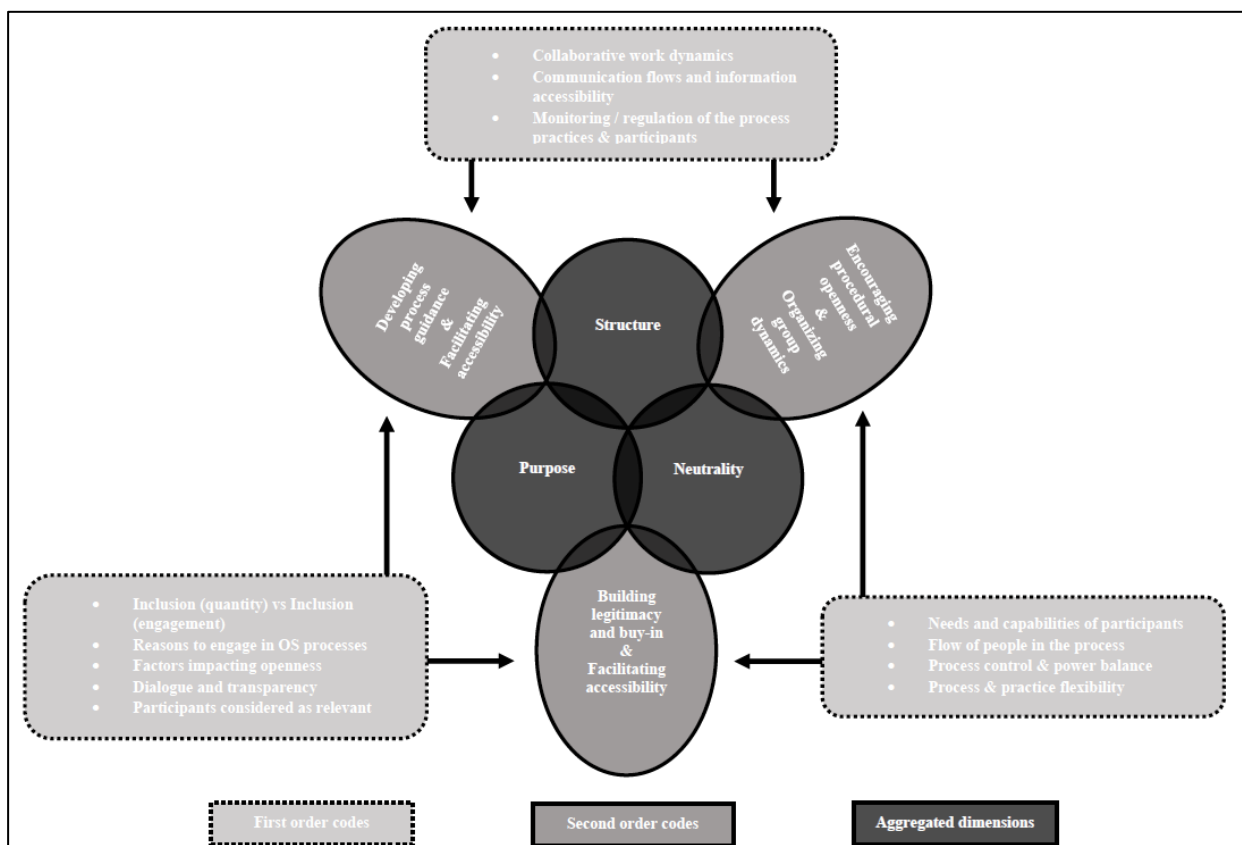
This study follows an inductive, exploratory approach rooted in grounded theory principles (Corbin & Strauss, 1990; Strauss & Corbin, 1998). Although the data consists of published case studies from prior research, the analysis process mirrored that of a primary qualitative investigation. Similar to other QMS applications in management (e.g., Carlson & Palmer, 2016; Soral et al., 2021), the goal was to extract meaning across studies while preserving contextual richness.

The coding process began with open coding, aiming to capture the variety of practices, tensions, and patterns associated with openness in strategy-making. We used NVivo to manage

the 43 initial codes that emerged inductively from the selected articles. These codes included elements such as “information input from organizations” and “loss of context and argumentation,” and were grouped into first-order categories representing core challenges in open strategy. Thus, this primary understanding was “grounded” and confirmed with each additional case analyzed (Corbin & Strauss, 1990, p. 10–11).

In the second phase, these categories were refined into second-order themes through iterative comparison and abstraction. This step involved moving from descriptive coding to theoretical interpretation, identifying cross-cutting practices such as “encouraging procedural openness” or “building legitimacy and buy-in,” framing the second order themes as the practices through which organizations can manage the complexity of openness in open strategy processes. Figure 1 presents the structure of this coding process, and the levels of abstraction used.

**Figure 1. Coding Process and Levels**



Throughout this process, we engaged in constant comparison across cases and used existing literature (on stakeholder engagement and collaborative governance) as sensitizing concepts (Strauss & Corbin, 1998). These concepts were not used to define categories a priori, but rather to guide interpretation and support theoretical sensitivity. This reflexive dialogue between data and theory helped consolidate the three central constructs—structure, neutrality, and purpose—which emerged gradually from the coding process.

This analytical strategy aligns with the principle of data sufficiency (Suri, 2011), where convergence and saturation of themes are sought not statistically, but conceptually. It also reflects the intent of qualitative meta-synthesis: to generate higher-level insights that integrate empirical variation into meaningful theoretical constructs.

### **3.2.1. Cross-case.**

Following iterative coding and cross-case comparison, five second-order themes emerged as central practices through which organizations manage the complexity of open strategy processes: developing process guidance, facilitating accessibility of content, building legitimacy and buy-in, encouraging procedural openness, and organizing group dynamics. These themes capture recurring patterns across the 25 selected case studies and reflect the practical tensions that arise in translating openness into action.

Rather than aligning neatly and exclusively with a single conceptual dimension, each of these themes contributes to multiple aspects of the overarching constructs identified in the synthesis—structure, purpose, and neutrality. For example, developing process guidance contributes both to structure, by formalizing procedures and frameworks, and to purpose, by clarifying strategic intentions. Facilitating accessibility relates simultaneously to structure, by organizing information flows; to neutrality, by ensuring equitable access to content; and to purpose, by fostering meaningful engagement. Building legitimacy and buy-in supports both purpose, through the construction of shared strategic intent, and neutrality, by recognizing and

validating the perspectives of diverse participants. Encouraging procedural openness underpins structure by introducing transparent mechanisms, while also contributing to neutrality by widening participation. Finally, organizing group dynamics reinforces both structure and neutrality, as it helps mediate interactions, balance influence, and sustain productive collaboration.

Together, these themes illustrate that open strategy practices are inherently multidimensional and are not governed by a single logic of inclusion or control, but by the ongoing interplay between procedural design, relational balance, and strategic alignment, and that effective facilitation requires simultaneously calibrating these dimensions. In the following section, each theme is presented in turn, with supporting evidence from the analyzed cases.

### **3.2.2. Developing Process Guidance.**

Across the analyzed cases, both organizations and participants encountered recurring difficulties in managing collaboration. A central challenge was reaching consensus within participant groups, especially when individuals had divergent or conflicting motivations, or were misaligned with the organization's strategic goals (Seidl & Werle, 2018; Van der Steen, 2017; Dobusch & Kapeller, 2018). When consensus was lacking, processes often stagnated or collapsed, highlighting the need for guided progression through structured and transparent means (Bryant et al., 2011). Some organizations addressed this by appointing moderators to help coordinate and converge ideas (Bjelland & Wood, 2008), or by explicitly framing participation rules to clarify boundaries and expectations (Amrollahi & Rowlands, 2017; Stieger et al., 2012; Van der Steen, 2017).

Several cases also revealed that participation was hindered by mistrust or fear. Participants were sometimes reluctant to engage openly, suspecting top management of monitoring their input or pre-determining outcomes (Denyer et al., 2011). This lack of psychological safety undermined transparency and constrained the process of co-construction.

The literature points to the need for organizations to address such concerns early on by clearly communicating the rules and limits of openness and fostering trust among participants (Bryant et al., 2011; Jarzabkowski & Balogun, 2009).

Moreover, participants often lacked clarity regarding the objectives of the initiative and their expected role. Cases frequently reported confusion about the rationale for inclusion and the contributions being sought (Bryant et al., 2011; Dobusch et al., 2019; Stieger et al., 2012). Process guidance was therefore needed not only during but also before the engagement phase—to frame strategic intentions, define roles, and anticipate tools or templates that would support interaction (Jarzabkowski & Balogun, 2009; Bridoux & Stoelhorst, 2016). The lack of common understanding also generated information loss and discontinuity between different phases of participation, especially when there was no dedicated role to ensure the transmission of context or rationale (Van der Steen, 2017; Deken et al., 2018).

Finally, some studies highlighted the tension between openness and overload. Without structure, the process risked being perceived as chaotic or unmanageable. Participants needed orientation regarding not just when and how to contribute, but also about the limits of their influence—a condition that process guidance can help establish (Zaggl et al., 2019).

Overall, the case evidence suggests that developing process guidance is essential to both establishing procedural structure and articulating a shared purpose. Such guidance enables convergence, reduces ambiguity, and supports a more inclusive and coherent engagement, making it a foundational component of effective open strategy initiatives.

### **3.2.3. Facilitating Accessibility.**

Facilitating accessibility involves not only the provision of content but also the conditions under which participants can meaningfully engage in open strategy processes. It touches on structure—through the organization of information flows; on neutrality—by reducing asymmetries in access; and on purpose—by clarifying roles and expectations.

Several cases in the corpus reveal persistent communication breakdowns between organizations and participants, resulting in confusion, disengagement, or misaligned expectations (Castelló et al., 2016; Gegenhuber & Dobusch, 2017). Participants often lacked clarity about the objectives of the initiative, the scope of their role, or the boundaries of their contributions (Schmitt, 2010; Stieger et al., 2012; Dobusch & Kapeller, 2018). In some cases, participation was involuntary or poorly framed, leading to uneven levels of commitment (Amrollahi & Rowlands, 2018).

These patterns underscore the importance of two-way communication and the transparent presentation of both strategic content and procedural rules (Castelló et al., 2016; Denyer et al., 2011). Asymmetries emerged when participants lacked the technical knowledge held by managers or when information was conveyed in inaccessible formats (Denyer et al., 2011; Zaggl et al., 2019). In such cases, accessibility depends not only on what is shared, but also on how it is translated—adjusted to the informational needs of diverse stakeholders (Luedicke et al., 2017).

Equally important is transparency in the treatment of participant input. When organizations made the process for integrating suggestions visible—and clarified whether and how contributions would be implemented—participants felt more included and stayed engaged over time (Dobusch et al., 2019; Gegenhuber & Dobusch, 2017; Bryant et al., 2011). Accessibility thus entails both the availability of relevant information and the design of feedback loops that help participants see how their input shapes outcomes (Amrollahi & Rowlands, 2018; Harrison et al., 2010; Deken et al., 2018; Zaggl et al., 2019).

In short, accessible open strategy practices go beyond content distribution to address interpretability, inclusivity, and responsiveness—key conditions for meaningful engagement.

#### **3.2.4. Organizing Group Dynamics.**

Organizing group dynamics involves managing the fluid and often unpredictable interactions among participants during open strategy processes. Across the analyzed cases, participants frequently entered or exited the process at different stages, whether voluntarily or in response to structural constraints (Denyer et al., 2011; Luedicke et al., 2017; Seidl & Werle, 2018). These shifting patterns introduced complexity in coordination, as participants faced barriers such as information overload, inaccessible tools, unclear practices, and insufficient accountability from the organization (Bryant et al., 2011; Dobusch et al., 2019; Van der Steen, 2017).

This variability in participation demanded adaptive practices to accommodate diverse entry points and maintain coherence. When participation was anonymous or tightly controlled by management, tensions emerged regarding legitimacy and influence (Amrollahi & Rowlands, 2018; Dobusch et al., 2019). In some instances, decision-making was limited to small groups or steering committees, creating perceptions of symbolic inclusion or manipulation (Denyer et al., 2011; Luedicke et al., 2017). These practices constrained genuine dialogue and undermined trust in the openness of the process.

Power asymmetries were also reinforced when top management retained full control over topic selection or evaluation criteria (Amrollahi & Rowlands, 2017; Bryant et al., 2011; Stieger et al., 2012), occasionally predetermining outcomes or steering the conversation toward predefined goals (Van der Steen, 2017). At the same time, participants—particularly external ones—could resist or renegotiate these framings by asserting influence through visibility, reputation, or technical expertise (Zaggl et al., 2019; Jarzabkowski & Balogun, 2009).

Such dynamics highlight the importance of facilitation in balancing influence, clarifying roles, and sustaining constructive engagement. Facilitators help anticipate friction, ensure that diverse voices are heard, and create conditions for inclusive collaboration (Amrollahi &



Rowlands, 2017). By doing so, they contribute to both structure—through process clarification—and neutrality—by mediating power and supporting fair participation.

### **3.2.5. Encouraging Procedural Openness.**

The analysis of the cases reveals that participants involved in open strategy processes often have differing levels of willingness, capabilities, and expectations, which shape their ability to engage. A first major need that emerged was flexibility. In several cases, participants were not involved voluntarily (Amrollahi & Rowlands, 2017), leading to disengagement, selective participation, or minimal interaction (Castelló et al., 2016; Jarzabkowski & Balogun, 2009; Van der Steen, 2017). Flexibility was also necessary to adapt tools and practices to participants' usage patterns, ensure asynchronous access to content, and accommodate varying entry points and time availabilities (Luedicke et al., 2017; Seidl & Werle, 2018; Van der Steen, 2017).

Closely related to this was the need for sufficient time. Several studies reported that participation was hindered by time constraints or rigid schedules (Bjelland & Wood, 2008; Bryant et al., 2011; Denyer et al., 2011; Dobusch et al., 2019). In some cases, participants could only contribute within narrow time windows, limiting their ability to engage deeply with the content, reflect on ideas, or participate in discussions (Stieger et al., 2012). Although extending the duration of engagement sometimes helped, it did not systematically lead to increased participation, underscoring the need to design timeframes that balance openness with feasibility (Bryant et al., 2011; Stieger et al., 2012).

Finally, the case studies emphasized the need for guidance in navigating these tensions. Organizations often struggled to calibrate the balance between broad participation and process control, leading to either over-complexity or disengagement (Denyer et al., 2011; Schmitt, 2010; Stieger et al., 2012; Van der Steen, 2017). In some instances, participants exerted pressure to expand openness beyond what was initially anticipated (Jarzabkowski & Balogun, 2009;

Zaggl et al., 2019), while in others, low engagement reflected a lack of clear expectations or ownership. The most successful cases were those in which participants and organizations co-defined the process and identified mutual benefits from the outset (Bryant et al., 2011; Schmitt, 2010). This included initiating early sense-making discussions and maintaining a high level of transparency throughout the initiative (Amrollahi & Rowlands, 2018; Harrison et al., 2010).

Encouraging procedural openness thus requires not only the willingness to include participants, but also the creation of a structured and neutral environment where time, expectations, and rules are adapted to participants' needs. When such calibration is absent, openness becomes performative or burdensome, weakening its strategic potential.

### **3.2.6. Building Legitimacy and Buy-In.**

Across the analyzed cases, building legitimacy and buy-in emerged as one of the most critical challenges in organizing open strategy initiatives. Many organizations struggled to control the degree of openness in a way that would foster engagement without creating confusion or resistance. In most cases, the absence of clearly defined governance structures and rules—such as who decides, on what basis, and how inputs are used—created tensions and ambiguity (Dobusch et al., 2019; Harrison et al., 2010; Jarzabkowski & Balogun, 2009).

Several cases emphasized that legitimacy must be cultivated before initiating the open process. This involves transforming disconnected “crowds” into engaged “communities” by investing time and resources into listening to participants' needs and expectations (Dobusch & Kapeller, 2018; Gegenhuber & Dobusch, 2017; Stieger et al., 2012). Legitimacy was strengthened when participants felt that their voices mattered and that the process had been co-designed with them in mind (Bryant et al., 2011; Castelló et al., 2016; Deken et al., 2018).

In many instances, however, organizations failed to allocate sufficient resources to this initial engagement phase. As openness increases, so does the need for support structures—yet organizations were often unprepared for this demand (Castelló et al., 2016; Van der Steen,

2017). Additionally, while some initiatives were launched to respond to crises or uncertainty, others stemmed from a proactive desire to align with an organization's culture of transparency (Bjelland & Wood, 2008; Bryant et al., 2011; Deken et al., 2018; Luedicke et al., 2017). These motives were not always communicated to participants, which undermined trust and collective alignment.

Across the cases, a recurring theme was the need for organizations to clarify their intentions and explicitly explain the “why” behind the initiative. Several studies reported that participants questioned the organization's real commitment to openness—especially when their contributions were not acted upon or when decision-makers failed to provide feedback (Bryant et al., 2011; Gegenhuber & Dobusch, 2017; Schmitt, 2010). This lack of follow-through damaged credibility and reduced future willingness to engage.

Complicating this further was the asymmetry of accountability: while participants were invited to contribute, only top management bore the legal and financial responsibility for strategic outcomes, which occasionally limited the scope of implementation (Luedicke et al., 2017).

Finally, diversity was identified as a key condition for legitimacy, yet was often limited. Most open strategy initiatives engaged primarily internal actors, with external stakeholders underrepresented (Harrison et al., 2010; Seidl & Werle, 2018; Van der Steen, 2017). Selecting the right participants at the right moment—and assigning them clear roles—was shown to support process legitimacy. In some cases, dedicated facilitators or coordination groups were used to sustain participation and mediate expectations (Bryant et al., 2011; Stieger et al., 2012; Van der Steen, 2017).

In sum, building legitimacy and buy-in supports the purpose of open strategy by aligning intentions and fostering recognition, while also ensuring neutrality through inclusive

practices and equitable treatment. When this legitimacy is weak, openness can appear superficial or manipulative, reducing both its ethical and strategic value.

The analysis of 25 qualitative case studies has revealed five interrelated second-order themes that capture how organizations navigate the tensions and opportunities of open strategy processes: developing process guidance, facilitating accessibility of content, building legitimacy and buy-in, encouraging procedural openness, and organizing group dynamics. These practices are not isolated; rather, they contribute in overlapping ways to the broader challenges of balancing procedural structure, relational neutrality, and strategic purpose. While each practice operates at a different level of interaction—design, information, participation, coordination—they collectively point to a deeper organizational need: the capacity to maintain openness without losing coherence, control, or inclusiveness. In the following discussion, we explore how these findings inform a conceptual model of open strategy organizing, and we introduce facilitation as a central mediating process that enables organizations to navigate these tensions dynamically.

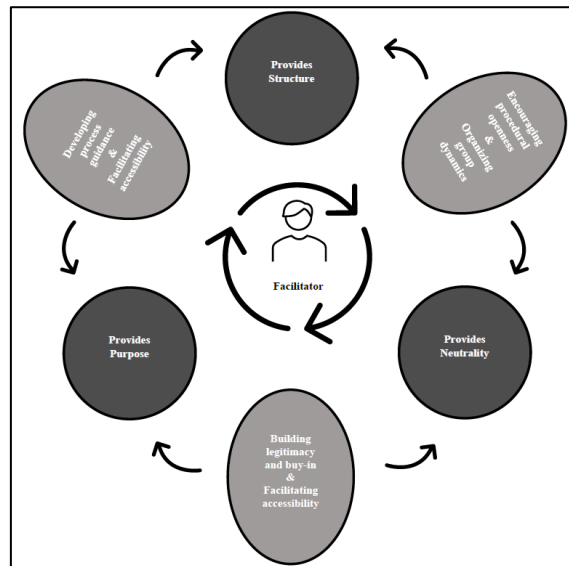
## **4. DISCUSSION AND IMPLICATIONS**

### **4.1. ARTICULATING FACILITATION THROUGH STRUCTURE, NEUTRALITY AND PURPOSE**

The coding process revealed five recurring second-order themes that represent concrete practices used by organizations to manage the challenges of openness: developing process guidance, facilitating accessibility of content, building legitimacy and buy-in, encouraging procedural openness, and organizing group dynamics. These themes were not isolated, but rather connected to deeper organizing principles that enable open strategy in practice. Through axial coding and iterative abstraction, these principles were grouped under three overarching theoretical constructs: structure, neutrality, and purpose. Figure 2 illustrates how each of the five practices contributes to one or more of these dimensions, highlighting the multidimensional

nature of facilitation. This mapping serves as a bridge between the empirical results of the synthesis and the theoretical model developed .

**Figure 2. Articulation between Second-Order Themes and Theoretical Dimensions of Facilitation**



This figure synthesizes the results of the qualitative meta-synthesis by mapping five second-order themes—derived inductively from 25 case studies—onto three theoretical constructs that emerged during axial coding: structure, neutrality, and purpose. The visualization illustrates how each empirical practice contributes to multiple dimensions of facilitation, thereby forming a bridge between raw data and the conceptual model of open strategy organizing.

This model introduces the elements of structure, purpose, and neutrality as an alternative to the traditional inclusion/transparency continuum that is brought forward in open strategy literature (Whittington et al., 2011) to guide and analyze open strategy initiatives. Where inclusion is defined as “the participation in an organization’s ‘strategic conversation’, the exchanges of information, views and proposals intended to shape the continued evolution of an organization’s strategy” and transparency as “the visibility of information about an

organization's strategy, potentially during the formulation process but particularly with regard to the strategy finally produced" (Whittington et al., 2011, p. 532). This paper suggests structure (providing an accessible, transparent, and inclusive environment), as in the crafting and monitoring of the practices and process; purpose (providing informed, legitimate, and relevant practices and processes), as in the two-way relationship building between participants and organizations; and neutrality (providing equality, flexibility, and openness in the practices and processes), as in the governance and power balance of all actors involved.

The following table summarizes the links between the five second-order themes, the theoretical constructs they inform, and the specific facilitation roles that emerge from the analysis.

**Table 3. Facilitation roles linking second-order themes to theoretical dimensions**

<b>Second-order themes from QMS</b>	<b>Related construct</b>	<b>Facilitation role</b>
Developing process guidance	Structure	Designs and maintains procedural scaffolding, sequences, tools
Facilitating accessibility	Structure / Neutrality	Ensures equitable access to information, adjusts tools to participant profiles
Building legitimacy and buy-in	Purpose	Fosters shared commitment, explains rationale, manages expectations
Encouraging procedural openness	Neutrality / Structure	Balances openness and closure, enforces fair and transparent rules
Organizing group dynamics	Neutrality	Manages power dynamics, encourages inclusive and respectful interactions

This synthesis reinforces the idea that facilitation operates across multiple levels simultaneously. Rather than being tied to a single construct, each facilitation role mediates several dimensions of open strategy work, underscoring its centrality in navigating complexity.

The five second-order themes identified in the meta-synthesis reflect concrete practices through which organizations manage openness. These themes map directly onto the three higher-order constructs of structure, neutrality, and purpose, which form the core of the

proposed conceptual model. For instance, developing process guidance and facilitating accessibility reflect efforts to create a procedural structure that supports inclusion and clarity. Building legitimacy and buy-in relates to the purpose dimension, emphasizing the need for collective intent and mutual recognition. Themes such as procedural openness and group dynamics point to issues of neutrality, particularly in terms of power balance and fair participation. These three constructs are not independent; rather, they are interconnected dimensions of open organizing that require continuous calibration. Facilitation, as observed across cases, plays a key integrative role by aligning these dimensions: it provides structure, maintains neutrality, and helps articulate and sustain purpose throughout the process.

With these core constructs in mind, it is important to recognize that facilitation is not a static role. It evolves and adapts as strategy-making processes unfold, requiring facilitators to adjust their approach to the needs of participants and the goals of the organization.

#### **4.2. DYNAMIC NATURE OF FACILITATION: A TEMPORAL AND SITUATED PROCESS**

Although the model presented in Figure 2 highlights the key dimensions of structure, neutrality, and purpose in open strategy processes, it does not imply a static or linear implementation. Rather, facilitation unfolds over time in response to the evolving needs of participants and the process itself. Preparatory practices like process guidance help establish structure and clarify purpose early on. Others, such as organizing group dynamics or encouraging procedural openness, are iterative or reactive, emerging during the engagement phase in response to conflict, imbalance, or disengagement. Facilitating accessibility and building legitimacy often occur throughout the process, and especially during closing or consolidation stages where reflection, feedback, and buy-in are crucial. Thus, facilitation is inherently temporal, involving both planned and adaptive actions across successive or overlapping phases. This dynamic and situated nature of facilitation calls for a broader understanding of its role beyond procedural guidance.

While facilitation emerged from the QMS as a critical enabler of openness, it can also be understood more broadly through the lens of strategy-as-practice research. Jarzabkowski et al. (2013) emphasize the role of practitioners and praxis in shaping how strategy unfolds in real time. In this view, the facilitator is not a neutral conduit, but a key actor who enacts, adapts, and sometimes transforms strategic interactions. The findings of this study support this perspective: facilitators do more than orchestrate processes—they mediate tensions between inclusion and control, make openness operational, and recalibrate participation dynamically. Their role is especially salient in maintaining coherence when strategy-making is distributed across individuals, communities, and organizations. As shown in the QMS, this role encompasses enabling procedural openness, structuring group dynamics, and securing shared purpose—all through an active process of relational and temporal calibration. Thus, facilitation should be recognized not just as a support function, but as a practice of strategy work, central to managing complexity in open organizing.

This dynamic and situated nature of facilitation calls for a broader understanding of its role beyond procedural guidance. From a strategy-as-practice perspective, facilitators can be seen as practitioners who actively shape strategic work through real-time mediation, adaptation, and orchestration (Jarzabkowski et al., 2013). They intervene not only to balance participation, but also to regulate meaning, manage tensions, and enable convergence across actors and practices. As such, facilitation constitutes a core strategic activity in contexts of distributed agency and high uncertainty.

One of the key tensions facilitators must address is the trade-off between inclusion and strategic efficiency. The more open and participatory the process, the more challenging it becomes to ensure clarity, speed, and coherence in strategic outcomes. Several cases in the QMS illustrated how excessive or poorly managed inclusion led to confusion, delays, or disengagement. This echoes insights from Dobusch et al. (2017), who argue that open strategy



requires not absolute openness, but rather a governance model that manages openness selectively and transparently—through participation rules, framing, and feedback mechanisms. In this view, facilitation is not simply about enabling openness, but about governing it, ensuring that inclusion supports rather than hinders strategic purpose.

This reinforces the relevance of the present study's conceptual model. By articulating the interdependent dimensions of structure, neutrality, and purpose, and situating facilitation at their intersection, the model provides a framework for managing openness as an organizational capability—one that treats the inclusion/efficiency tension not as a dilemma to solve, but as a dynamic to orchestrate.

Having outlined the core dimensions of facilitation, it is crucial to understand that its role evolves over time, adapting to the changing needs of the participants and the objectives of the strategy process. Facilitators must navigate these shifts, adjusting their approaches across various phases of engagement and ensuring continued alignment with organizational goals.

#### **4.3. FACILITATING DYADIC TENSIONS IN OPEN STRATEGY**

Having established the foundational dimensions of facilitation and their evolving role over time, we now turn to the interplay between these dimensions. In practice, facilitators rarely address structure, neutrality, or purpose in isolation. Instead, their work often involves managing tensions that arise at the intersection of these principles. To better understand how facilitation supports strategic openness, this section analyzes the dyadic relationships between the three core constructs. Examining these pairings—structure and neutrality, neutrality and purpose, purpose and structure—sheds light on the balancing acts facilitators perform to maintain inclusive, coherent, and strategically meaningful processes.

##### **4.3.1. Providing Structure and Neutrality: Enabling Procedural Balance**

Open strategy processes are dynamic by nature, with varying degrees of transparency and inclusion across phases (Hautz et al., 2017). This variability often stems from the tension

between openness and control: while top management or consultants typically design the process, participants are rarely involved in shaping it. This tendency to centralize process design—often justified by a desire to retain control—limits procedural openness from the outset.

The QMS revealed that this limitation is frequently addressed through facilitation practices that emphasize both structure and neutrality. For instance, the code “Encouraging procedural openness” highlights the facilitator’s role even before the ideation phase begins. This anticipatory function involves engaging both organizers and participants in clarifying the aims, expectations, and rules of participation. Amrollahi and Rowlands (2018) propose a pre-planning phase, which, while not always formalized, emerged across several cases as an important moment for aligning actors and setting the tone of collaboration.

In line with this, stakeholder engagement literature stresses the value of entering into two-way communication early on (Kujala et al., 2022; O’Riordan & Fairbrass, 2014). The facilitator enables this dialogue by creating an environment where participants feel safe to express their views and understand the constraints of others. According to Prendiville (2008), this requires not only emotional intelligence and respect for divergent perspectives, but also a solid grasp of group needs, history, and compatibility of goals. This connects directly to the QMS theme of “Organizing group dynamics,” which captures how facilitation shapes group processes to ensure fairness and functionality.

Recent research in governance design supports this need for balance. O’Mahony and Karp (2022) show that openness must be anchored in structural mechanisms—such as stable participation rules and distributed leadership—to remain functional over time. Their findings emphasize that platforms with clear access protocols and collective decision-making rules are more likely to sustain engagement and avoid process drift. In this sense, “closing for the benefit

of openness” (Dobusch et al., 2019) becomes a necessary paradox: openness requires closure on the meta-level of how openness is structured.

The facilitator thus becomes a key mediator of procedural balance. On one hand, they structure the process—through rules, sequences, and engagement protocols; on the other, they remain neutral, ensuring that those rules are applied fairly, adaptively, and transparently. As Prendiville (2008) reminds us, neutrality also involves setting boundaries—not only for participants, but for the facilitator themselves. This balance between designing and moderating, between guiding and withholding, defines the facilitator’s role in enabling both inclusive and coherent open strategy processes.

#### **4.3.2. Providing Neutrality and Purpose: Aligning Inclusion and Intent**

Open strategy remains a complex and evolving practice, marked by uneven levels of inclusion and transparency throughout its implementation. The cases analyzed in the QMS reveal that as open strategy unfolds, organizations often struggle to maintain alignment between the initial intentions of openness and the evolving dynamics of participation. This misalignment can result in participants feeling excluded or manipulated, especially when openness is retracted in response to uncertainty or loss of control. The legitimacy of the initiative then suffers, along with participants' trust and motivation to engage (Bryant et al., 2011; Gegenhuber & Dobusch, 2017; Schmitt, 2010).

Yet, the QMS findings suggest that effective facilitation can help manage this tension by fostering a balance between neutrality—ensuring equitable treatment—and purpose—clarifying intentions and creating meaningful engagement. Notably, it is not the quantity of participants that determines the success of open strategy, but rather the ability to transparently manage expectations and recognize stakeholders’ contributions. This includes allowing participants to define their own level of engagement, offering multiple forms of participation,

and respecting individual motivations, needs, and capabilities (Mori, 2010; Bridoux & Stoelhorst, 2016).

The stakeholder engagement literature provides useful parallels: effective inclusion hinges on two-way communication, responsiveness, and the acknowledgment of stakeholder diversity (Freeman, 2010; Kujala et al., 2022). Facilitators must ensure that all participants have fair opportunities to contribute, while also guiding the group toward a shared understanding of the initiative's goals. This echoes the distinction drawn by Gegenhuber and Dobusch (2017) between broadcasting, dialoguing, and including as levels of stakeholder engagement, each requiring a different degree of facilitation and commitment to purpose.

Legitimacy and buy-in are particularly sensitive to whether participant input is valued and acted upon. Several cases showed that when organizations failed to explain how contributions were used—or why they were not—credibility deteriorated (Bryant et al., 2011; Schmitt, 2010; Luedicke et al., 2017). Conversely, organizations that communicated the “why” behind their initiative and provided feedback loops were more likely to sustain engagement and build a sense of ownership (Castelló et al., 2016; Deken et al., 2018).

The QMS also revealed that participants' motivations are rarely aligned with the organization's strategic objectives from the start. Some initiatives were launched to respond to external pressure or crises, while others stemmed from internal values of transparency or innovation (Bjelland & Wood, 2008; Deken et al., 2018; Van der Steen, 2017). Clarifying purpose is therefore a continuous task—one that facilitators play a key role in managing.

Finally, neutrality and purpose converge in the design of the participatory process. Facilitators act as relational anchors who manage asymmetries, clarify roles, and ensure that openness does not devolve into symbolic participation. As Prendiville (2008) notes, they must strike a delicate balance between supporting the process and remaining detached from its content—creating a space where collective purpose can emerge without coercion. In this way,

facilitation becomes the glue that holds together a fair, legitimate, and strategically meaningful process of openness.

#### **4.3.3. Providing Purpose and Structure: Anchoring Strategic Openness**

Facilitation is grounded in the recognition and mobilization of individual capabilities within a group. It is about identifying and valuing participants' experience, creativity, and ability to contribute meaningfully to a process of collective transformation (Prendiville, 2008, p. 14). When participants understand both the purpose of their involvement and the structure supporting it, engagement becomes more effective and empowering.

One key area where purpose and structure converge is in the process of consensus building. As highlighted in several QMS cases, this phase is often complex and fraught with tension, due to the diverse profiles and expectations of participants. Open strategy processes rarely match the ideal-typical vision of democratic decision-making described by Tavakoli et al. (2017). In many instances, exclusionary practices or forms of symbolic closure emerge, and inclusion or transparency is compromised as traditional governance logic resurfaces.

However, these tensions also point to the hybrid nature of open strategy, which often blends participative elements with top-down control (Whittington et al., 2011; Hautz et al., 2017). Rather than interpreting this as a failure, it may be more accurate to view these interactions as intertwined modes of organizing. Facilitators must help participants navigate this ambiguity by providing process guidance and clarity about the scope of their contribution.

The facilitator thus acts as an orchestrator of structured openness. Before the process begins, they work with stakeholders to define the goals, roles, and modalities of participation. During implementation, they adjust expectations and practices to maintain alignment, ensure fairness, and encourage engagement. This flexibility is particularly important in long or iterative processes, where participation levels and strategic clarity evolve over time. The

facilitator may serve as a collective memory, ensuring coherence even when participants or phases shift (Prendiville, 2008).

Temporal calibration is essential: as openness increases, so does the duration and complexity of the process. Facilitators must balance the need for a clear procedural framework with the ability to adapt it as participation unfolds. Structure without shared purpose becomes bureaucratic; purpose without structure becomes chaotic. Effective facilitation means maintaining this equilibrium across phases (Stieger et al., 2012; Tavakoli et al., 2017).

While facilitation involves managing multiple dimensions, its true value lies in its role as a core component of strategic work. By repositioning facilitation within the broader strategic landscape, it becomes clear that it is not merely procedural support but an essential element of strategic execution.

#### **4.4. RECONCEPTUALIZING FACILITATION AS STRATEGIC WORK**

Whittington et al. (2011) revealed that the role of strategists will become more modest with the opening of strategy work, moving toward the importance of process skills such as coaching, facilitation, and communication and away from traditional analytical skills (Whittington et al., 2011). Facilitation is a tool integrated by numerous organizations and groups as a method that will increase inclusion, involvement, participation, and equality of all members (Prendiville, 2008). This section of the paper brings forward the notions of structure, neutrality, and purpose in openness as being fundamental to managing the complexity arising from open practices and to allow participation, inclusion, and decision-making to be balanced in open strategy and, as will be suggested in the following section, also in the closely related field of stakeholder engagement that has emerged as being a central topic in open strategy.

Reconceptualizing facilitation as a strategic capability naturally leads to considering its governance implications. Open strategy processes require governance frameworks that can effectively balance the tension between broad inclusion and the need for strategic efficiency.

#### 4.5. NAVIGATING INCLUSION AND EFFICIENCY: A GOVERNANCE PERSPECTIVE

A complementary reading from the literature on collaborative governance helps to broaden and strengthen the conceptual foundation of the model proposed in this paper. From this perspective, open strategy initiatives can be understood as forms of partnership governance (Ansell & Gash, 2008), where interdependent but autonomous actors jointly address complex, often contested strategic challenges through deliberation and coproduction. This stream of research identifies several key enablers of successful collaboration: a clear governance structure, equitable participation mechanisms (neutrality), and the construction of a shared purpose, which resonate directly with the triadic framework of structure, neutrality, and purpose developed through this meta-synthesis.

More specifically, structure refers to the formal and informal rules that shape participation, organize the phases of strategy-making, and delineate roles and responsibilities. Neutrality echoes the governance literature's emphasis on power balancing and mediated deliberation, as found in the work of Emerson et al. (2012), where facilitators or intermediaries ensure fairness and inclusion across diverse voices. Purpose, finally, aligns with the notion of *principled engagement*—the mutual effort to articulate and commit to a shared strategic objective, which enhances trust, legitimacy, and sustained participation (Bryson et al., 2006).

Within this reframed lens, the facilitator is no longer merely a process guide, but a strategic mediator responsible for orchestrating group dynamics, mitigating asymmetries, and nurturing collective alignment. Integrating insights from partnership governance thus strengthens the theoretical grounding of the model (Table 2) and positions it as a contribution not only to open strategy, but also to the broader field of participatory governance and stakeholder democracy in organizational settings.

**Table 2. Conceptual Alignment Between Open Strategy Constructs and Collaborative Governance Principles**

<b>Construct from Open Strategy</b>	<b>Related Concept in Collaborative Governance</b>	<b>Functional Role in Strategy-Making</b>
Structure	Governance architecture, procedural design	Organizes participation, phases, and actor roles
Neutrality	Power balancing, mediated deliberation	Ensures fairness, prevents dominance or co-optation
Purpose	Principled engagement, shared objective-setting	Fosters legitimacy, alignment, and sustained engagement

As businesses strive to balance inclusion and efficiency, they must increasingly recognize that openness and stakeholder engagement are no longer optional but essential to their operations. Institutional and regulatory shifts, such as the ‘société à mission’ legal status and the Corporate Sustainability Due Diligence Directive (CSDDD), now mandate organizations to formalize these practices, ensuring they meet legal and ethical standards while pursuing their strategy.

#### **4.6. EMBEDDING OPEN STRATEGY IN LEGAL AND INSTITUTIONAL CONTEXTS**

While the preceding discussion has emphasized the internal organizational and processual dynamics of open strategy, recent regulatory shifts in the European context provide a compelling argument for considering openness as not only a managerial choice, but increasingly a legal and institutional imperative. In France, the “société à mission” legal status requires companies to formalize social and environmental objectives in their statutes and to establish a mission committee. This body, which must include external stakeholders, is explicitly tasked with monitoring and contributing to strategic orientations—thus operationalizing stakeholder participation in the governance of strategy. Similarly, the Corporate Sustainability Due Diligence Directive (CSDDD)—a major evolution in EU regulation—imposes obligations on large firms to proactively assess and address human rights and environmental risks throughout their supply chains. These obligations are articulated through vigilance plans, which necessitate cross-functional coordination and engagement with stakeholders beyond the firm’s boundaries.



These regulatory instruments reinforce the relevance of the present framework. They reflect a growing expectation for firms to implement processes that combine structured participation (structure), inclusive governance (neutrality), and collective purpose definition (purpose). In this context, facilitation becomes a critical capability, not only to manage internal complexity, but also to ensure compliance, legitimacy, and strategic coherence in a shifting regulatory landscape.

Legal frameworks not only impose constraints but also highlight the need for a deeper integration of stakeholder interests into strategic decision-making. Understanding the interplay between open strategy and stakeholder engagement becomes essential, especially as organizations must engage meaningfully with a variety of external actors.

#### **4.7. BRIDGING OPEN STRATEGY AND STAKEHOLDER ENGAGEMENT**

Open strategy is closely related to the stakeholder engagement research field, as both the literature of business & society and management & strategy overlap (Kujala et al., 2022, p.1140). Stakeholder engagement refers to the aims, activities, and impacts of stakeholder relations in a moral, strategic, and/or pragmatic manner (Kujala et al., 2022, p. 1160), and focuses on participation (how do they participate?), inclusion (who is included?), and democracy (why do they have the right to some form of decision-making power?), which aligns with the topics discussed in the open strategy field to unpack the complexity of stakeholder engagement (Mori, 2010; Wenzel et al., 2022). Stakeholders are to be understood as being individuals, groups, or organizations that affect or are affected by organizational activities (Freeman, 2010). Related constructs of stakeholder collaboration (joint activities with external stakeholders), stakeholder inclusion (presence of stakeholders in organizational activities) and stakeholder democracy (participation of stakeholders in the processes of organizing, decision making and governance) closely link open strategy and stakeholder engagement together, each having their own nuances (Desai, 2018; Kujala et al., 2022, p. 1143; Matten & Crane, 2005).

Although engaging a broad range of stakeholders can enrich strategy-making, it also introduces complexities—particularly when competing interests, expectations, and power imbalances are at play. These challenges are amplified by the darker aspects of participation, such as manipulation and exclusion, which can undermine the legitimacy of the process.

#### **4.8. COPING WITH POLYPHONY AND THE DARK SIDE OF PARTICIPATION**

Bringing together the literature on open strategy and stakeholder engagement, and conducting the QMS, sheds light on the question of polyphony (Wenzel et al., 2022) in more open contexts of organizing and how to cope with it; this also further emphasizes the importance of process skills in organizations engaging in more openness, whether it be here through open strategy or in other domains such as open innovation, open government, or open science, answering directly the call for cross-fertilization of research in open organizing across different domains (Splitter et al., 2023). In contrast, while open strategy focuses on who's contributions are meaningful, stakeholder engagement focuses on “stakeholders' willingness to participate in business value creation” (Kujala et al., 2022, p. 1153). This slight just underlines the interest of bridging both literatures, as the various perceptions of a similar topic in different domains can be very insightful for both literature streams.

Organizations engage in openness in strategy-making processes expecting one or more of the following outcomes: (1) to generate and crowdsource ideas concerning a firm's strategic direction, (2) improve strategy, (3) foster inclusion and collaboration among the participants, (4) increase transparency and offer additional insights and understanding of an organization's strategy, (5) support strategic decisions, and (6) to transform an organization's strategy process (Hautz et al., 2019). Here, the focus is set on the organization and its performance rather than on the relationship the organization could build with its participants. In stakeholder engagement, recognition and respect (Noland & Phillips, 2010), doing good (Miska et al., 2014), empowerment of stakeholders (Ghodsvali et al., 2019), or the consideration of

stakeholders' wants, needs, and capabilities (Todeschini et al., 2020) are considered to be necessary for stakeholder engagement to be morally positive (Kujala et al., 2022, p. 1153).

Kujala et al. (2022) suggested the need to pursue research on the dark side of stakeholder engagement, as stakeholder engagement research was focusing mostly on the positive relations between stakeholders and organizations. The literature on open strategy and the objective of this paper, in consolidating the complexities of open strategy initiatives, sheds light on the dark side that is called for and “explores the intentional and unintentional harmful and negative aspects of the aims, activities and impacts of stakeholder engagement” (Kujala et al., 2022, p.1146) and of open strategy.

Effectively managing the complexities of participation requires a deliberate strategy to ensure facilitation remains a central part of open strategy processes. Institutionalizing facilitation allows organizations to manage these tensions continuously, ensuring that facilitation becomes an enduring capability that supports sustainable and inclusive strategic decision-making.

#### **4.9. MANAGERIAL IMPLICATIONS: INSTITUTIONALIZING FACILITATION**

The findings of this study suggest that facilitation should not be treated as an ad hoc or peripheral function in open strategy processes. Rather, it should be institutionalized as a strategic capability—anchored in specific roles, routines, and structures. Organizations can achieve this in several ways: by formally assigning facilitation responsibilities to trained individuals or teams; by integrating facilitation into the design of strategic processes (e.g., through defined participation protocols, process ownership, or iterative check-ins); and by embedding facilitation tools and practices—such as feedback mechanisms, agenda-setting frameworks, or decision-logging templates—into their digital and procedural infrastructure.

Institutionalizing facilitation serves several purposes. It provides continuity across strategy cycles, enables distributed engagement without losing coherence, and reduces the

burden of coordination on top management. It also signals a commitment to fairness and inclusivity, reinforcing neutrality in highly participatory contexts. In this way, facilitation becomes a governance lever that helps navigate the inherent complexity of open strategy—not by constraining participation, but by making it manageable, meaningful, and aligned with strategic intent.

## **5. CONCLUSION AND FUTURE RESEARCH AGENDA**

This study advances understanding of facilitation in open strategy by proposing a conceptual model based on three interrelated constructs: structure, neutrality, and purpose. Through a qualitative meta-synthesis of 25 case studies, we show that facilitation is central to enabling openness—not only by coordinating participation, but by mediating the tensions inherent in inclusive strategic processes.

By consolidating diverse research, the study extends open strategy theorization and contributes to ongoing efforts to address the darker side of stakeholder engagement (Kujala et al., 2022). Structure, purpose, and neutrality emerge as key to managing risks such as exclusion, inefficiency, or symbolic participation. This model complements prior work on inclusion enablers (Mount et al., 2020) and aligns with openness literature more broadly (Splitter et al., 2023).

Our findings highlight that many organizations lack the facilitation capabilities needed to sustain openness. Facilitators—whether formally appointed or emergent—play a strategic role in managing group dynamics and aligning stakeholders. Open strategy should therefore be approached as a continuous process, supported by facilitation practices embedded within the organization's culture and governance structures.

From a managerial standpoint, institutionalizing facilitation involves building relevant skills, formalizing roles, and fostering participatory routines. This supports greater legitimacy, coherence, and adaptability in strategy-making.

Future research could explore how facilitation shapes participation outcomes, strategy implementation, and governance development—especially in dynamic stakeholder environments. Investigating facilitators as boundary spanners (Lissillour & Sahut, 2021; Mell et al., 2022) and drawing on collaborative governance perspectives (Ansell & Gash, 2008) offer promising directions.

In sum, this article positions facilitation as a core enabler of open strategy. By synthesizing and extending prior research, and by identifying how facilitation balances openness with strategic coherence, this study contributes to both theory and practice. As organizations increasingly embrace openness—not only as a choice but as a necessity—understanding how to facilitate it effectively becomes essential to the future of strategic management.

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