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Intended or unintended strategy? The activities of middle managers in strategy implementation

Annabel Christie [a,*], Esther Tippmann [b]

[a] University of East London, United Kingdom
[b] University of Galway, Ireland

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ABSTRACT

When top managers task middle managers with implementing strategies, those strategies are often executed in a deviated form, which leads to the creation of unintended strategies. Despite much research on middle managers and their role and behaviors in strategy implementation, there is still only a limited understanding of the implementation activities that result in intended and unintended strategies. Using a strategy-as-practice perspective and interviews with 40 middle managers about 122 strategy implementations, we investigate strategy implementation activities and develop a model of middle manager activities in strategy implementation. We find that seven of the ten activities differ in frequency between intended and unintended strategies. This study extends the strategy implementation literature by conceptualizing a critical link in how different strategy implementation outcomes come about. We also broaden the middle management perspective in strategy by extending the range of activities that explain middle managers' engagement with strategy and differentiating them across two strategy implementation outcomes.

Introduction

Strategy implementation within organizations is complex and has varied outcomes (e.g., Hitt et al., 2017). Some strategies are implemented as intended (e.g., Mintzberg and Waters, 1985). However, unintended strategy implementations are also common (Mintzberg and Waters, 1985). Indeed, Nutt (1999) found that around half of strategies are not implemented as intended. Unintended strategies create unpredictable outcomes (Balogun, 2006): outcomes different from those envisioned by top managers (e.g., Mintzberg and Waters, 1985; Balogun and Johnson, 2004; Ates et al., 2020; Friesl et al., 2021). Unintended outcomes can also cause emergent strategies (Mirabeau and Maguire, 2014).

Managers play an important role in strategy implementation, including the attainment of intended and unintended outcomes, because they realize deliberate strategic intent (e.g., Friesl et al., 2021). They bring meaning to the contents of strategy plans and undertake particular actions to define their micro-elements during implementation (Lê and Jarzabkowski, 2015). While actors at many levels of organizations engage in strategy implementation, middle managers play a crucial role (e.g., Burgelman, 1994, 1996; Floyd and Wooldridge, 2000; Huy, 2002; Rouleau et al., 2015; Heyden et al., 2017). Top managers usually lead strategy formulation, and middle managers are primarily responsible for implementing a formulated strategy. Furthermore, middle managers are critical actors in strategy implementation because they connect top managers with the workforce, thereby enabling strategies to be implemented across the lower levels of an organization. Given the central role of middle managers in strategy implementation, this paper focuses on

* Corresponding author. 28 Old Brompton Road, London, SW7 3SS, United Kingdom.
E-mail addresses: annabelchristie2015@gmail.com (A. Christie), esther.tippmann@universityofgalway.ie (E. Tippmann).

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the actions that they perform in strategy implementation and the impact on achieving different strategy implementation outcomes.

Existing literature on the role of middle managers in strategy implementation has established that their behaviors influence strategy implementation outcomes, including the realization of, or divergence from, intended strategies (Mintzberg and Waters, 1985; Balogun and Johnson, 2005; Ates et al., 2020). Furthermore, studies have identified that middle managers may engage in various strategy implementation activities and practices (e.g., Johnson et al., 2003; Demir, 2015; Radaelli and Sitton-Kent, 2016; Friesl et al., 2021), including some deliberate deviating methods (Guth and Macmillan, 1986; Fenton-O'Creevy, 2001; Balogun and Johnson, 2004; Meyer, 2006; Ates et al., 2020). Although existing studies have revealed a spectrum of middle manager actions during strategy implementation, they have drawn insufficient links between activities and different strategy implementation results. Therefore, the impact of middle managers' strategy implementation actions on strategy outcomes remains underexplored. Understanding how different strategy implementation outcomes arise as a result of middle managers' actions is important because it will enable top managers to guide, influence, and support middle managers during strategy implementation. It will also allow top managers to intervene, if necessary, to achieve desired results. To develop insights on middle management strategy implementation actions and their implications, we ask: which middle manager activities result in strategy implementation in its intended or unintended form?

To address this question, we adopt a strategy-as-practice perspective (Johnson et al., 2007; Golsorkhi et al., 2015; Jarzabkowski et al., 2022), in which strategy is not something that an organization "has" but something that people "do" through strategy formulation and implementation. The strategy-as-practice perspective implies that strategy does not exist until managers enact it through human agency. Therefore, managerial practice during strategy implementation constitutes actions that move "our attention from making decisions about a strategic intent or direction to making the strategy happen" (Friesl et al., 2021: 3). We focus on situated activities relating to the praxis of strategy as it is enacted (e.g., Whittington et al., 2006; Jarzabkowski et al., 2007; Orlikowski, 2010). In the context of our study, situated activities relate to middle managers' actions during specific strategy implementations. We adopt an abductive approach and an interview-based study with 40 middle managers who were responsible for implementing 122 intended strategies; we use this study to identify and relate strategy implementation activities to intended or unintended outcomes.

Our study offers two main contributions. First, we extend the strategy implementation literature (e.g., Hitt et al., 2017; Friesl et al., 2021) by conceptualizing a critical theoretical link in the materialization of different strategy implementation outcomes. Second, we contribute to the middle management perspective (e.g., Floyd and Wooldridge, 1992; Huy 2002; Rouleau et al., 2015) by investigating the activities that explain how middle managers engage with strategy. We then demonstrate how these activities lead to intended and unintended strategies.

Theoretical background

In this section, we review the literature on the relationship between intended and implemented strategy, the role of middle managers in strategy implementation, middle managers' activities during strategy implementation, and how the strategy-as-practice view of situated activities can shed light on strategy implementation.

Strategy implementation: intended and unintended outcomes

Intended strategy refers to the use of objectives and means, which are usually formalized in a documented plan with targets, timeframes, and assigned responsibilities. These range from high-level corporate strategies to business unit, functional, and program strategies. Mintzberg and Waters (1985: 263) state that an intended strategy is developed "in its broad outlines but not in its specific details," and Mirabeau and Maguire (2014: 1226) refer to "when strategy is understood [as] looking forward as a plan." After strategic intent has been outlined, strategy implementation involves the conversion of strategic intent into practice (Friesl et al., 2021).

Textbooks tend to define strategy implementation in relation to action: "putting strategy into action" (Hill and Jones, 2013: 4) or "converting strategy into actions and good results" (Thompson et al., 2013: 44). In contrast, Friesl et al. (2021: 2) take a more multi-faceted view, arguing that strategy implementation "encompasses very different activities performed by different actors, both within, but potentially also across organizations". We adopt this broader view that strategy implementation requires many activities (actions) by many actors to convert intended strategy into an outcome, whether or not as intended. We further agree with Friesl et al. (2021) that implementation requires the configuration of organizational elements such as structures, processes, and resources.

Outcomes that reflect initial strategic intent may emerge as a strategy is implemented. During implementation, intended outcomes occur when strategies are executed in a way that aligns with articulated or formulated strategic plans. However, the field of strategic management has recognized the frequent gap between intended and realized strategies (e.g., Mintzberg and Waters, 1985). Mirabeau and Maguire (2014) clarified Mintzberg and Waters' (1985) reference to "realized strategies" as a combination of intended strategies and unintended emergent strategies. Emergent strategy arises from autonomous strategic behavior. In addition, deviating from an intended strategic plan may result in obstructed strategies (Guth and MacMillan, 1986) or changed strategies (Sillince and Mueller, 2007; Ahearne et al., 2014). Although it is beyond the scope of this paper to examine the implications of emergent, obstructed, or changed strategies, the gap between intended and realized strategies suggests that divergence is a common occurrence during strategy implementations.

Unintended strategies occur when intended strategies are not implemented at all, are significantly delayed, or are implemented in a substantially different way than was intended by top management. It is notable, however, that strategy deviations are not always harmful to firm performance. Indeed, middle managers may be better judges than top managers of how an intended strategy should be implemented (e.g., Ahearne et al., 2014; Wang et al., 2017; Heyden et al., 2020). However, the ultimate performance implications of the strategy implementation outcomes affected by the middle managers are beyond the scope of this paper; we compare both intended and unintended strategy implementation outcomes with original intent without considering effectiveness.

The role of middle managers in strategy implementation

Middle managers are vital to strategy implementation. While there are multiple definitions of middle managers, we adopt the one developed by Wooldridge et al. (2008), because it focuses on the role of middle managers in the context of strategy. They define middle managers as mediators between strategy set by top managers and day-to-day activities (Wooldridge et al., 2008: 1192). This definition supposes that middle managers receive intended strategies from top managers and are tasked with implementing them across the lower levels of the organization and across other managerial ranks (Radaelli and Sitton-Kent, 2016). This definition also emphasizes the crucial role of middle managers in connecting various levels within an organization (e.g., Regnér, 2003).

Middle managers' strategic behavior, especially its "integrative" or "divergent" nature in relation to top managers' intended strategies, plays a crucial role in creating intended or unintended strategy implementation outcomes (Floyd and Wooldridge, 1992; Pappas and Wooldridge, 2007). Middle managers are often seen as an important bridge, and sometimes a potential barrier, between a strategy and its implementation (Floyd and Lane, 2000; Huy, 2002, 2011; Rouleau, 2005). Boyett and Currie (2004) state that middle managers translate intended strategies by molding them to a specific setting. Therefore, middle managers may require some "flexibility" or "autonomy" to determine a course of action that they deem appropriate (e.g., Shimizu and Hitt, 2004; Ahearne et al., 2014; Wang et al., 2017).

Yet, there are multiple situational circumstances that may motivate middle managers to diverge from an intended strategy during implementation. First, they implement strategies in evolving environments (Guo et al., 2017), in which they may be faced with conflicting objectives and demands (Floyd and Lane, 2000), as well as scarce resources that need to be prioritized (Mantere, 2008; Mirabeau and Maguire, 2014). Therefore, if middle managers act in an organization's best interest, they must consider complex situational factors and circumstances when choosing their strategy implementation behaviors (Mintzberg and Waters, 1985). This may result in unintended strategies. Second, agency theory highlights the inherent challenge of aligning managers' individual interests with an organization's broader interest (Mantere, 2008). Indeed, Shimizu (2012) finds that agency problems tend to motivate managers at all levels to engage in divergent or opportunistic behaviors. For example, poor incentive alignment may insufficiently motivate middle managers to implement intended strategies. Guth and Macmillan (1986) show how self-interest affects middle managers' motivations to implement strategies and explain that their interventions against top management decisions are often motivated by conflicts of interest.

Middle manager activities in strategy implementation

Given the role of middle managers in strategy implementation, including the attainment of intended and unintended outcomes, prior studies have examined in more detail middle manager activities in implementation. The actions undertaken by middle managers in strategy implementation can be integrated with, or divergent from, their organization's intended strategy (Floyd and Wooldridge, 1992). Some studies have focused on how middle managers' actions result in divergent strategies. Other studies have focused on positive changes to intended strategies (e.g., Balogun and Johnson, 2004; Boyett and Currie, 2004; Guo et al., 2017). For instance, a study by Mantere (2005) examined how strategic practices enable and disable strategic champions, many of whom are middle managers. Furthermore, Azambuja and Islam (2023) find that middle managers deviate from intended strategies because of incompatible pressures and norms across organizational levels and locations, resulting in creative, practical adaptations. In other instances, the actions of middle managers may be seen as negatively affecting strategy implementation through "sabotage," "foot-dragging," "counterproductive actions," or "derailing" (e.g., Guth and Macmillan, 1986; Fenton-O'Creevy, 2001; Balogun and Johnson, 2004; Meyer, 2006; Ates et al., 2020).

Prior research has identified a range of middle manager behaviors during strategy implementation. Rouleau, Balogun, and Floyd (2015: 601–602) offer a review of relevant activities, including translating strategy (Boyett and Currie, 2004), sensemaking and sensegiving to interpret and sell strategic change at the organizational interface (Balogun and Johnson, 2004), reframing strategy (Sillince and Mueller, 2007), issue selling (Ling et al., 2005), and overcoming knowledge distribution challenges and mastering solution development (Tippmann et al., 2013; Tippmann et al., 2014). Moreover, it has been found that middle managers can exert influence beyond their formal position. For instance, research on manager networks shows how better networks increase social power, an important attribute differentiating leaders from non-leaders (Chiu et al., 2017). Similarly, networks enable strategy implementation by offering middle managers social capital and therefore access to resources, information, trust, and support (Ahearne et al., 2014; Glaser et al., 2015). Grosser et al. (2018) find that political skill both leads to innovation involvement and enables employees to take advantage of the innovation-enhancing potential of certain social network positions. Middle managers' access to these resources through their connections determines the extent to which they take initiative, which may result in deviations from intended strategies (Glaser et al., 2021). While the ability of middle managers to integrate organizational social networks helps companies to implement their strategies (Floyd and Wooldridge, 1997; Pappas and Wooldridge, 2007), their networks also shape managerial agency in strategy implementation.

Alongside these individual-level actions, organizational factors influence middle managers' strategy implementation behaviors. Significant organizational factors include managers' expected contributions, roles, and relationships with top managers (Raes et al., 2011). These relationships are crucial because they can denote support and trust, facilitating implementation endeavors and leading middle managers to take more or less initiative when engaging with intended strategies, including deviating actions (Glaser et al., 2021).

In summary, previous studies have established that middle managers are central to strategy implementation. They sometimes implement strategies as intended but sometimes deviate from top management intentions, which may lead to unintended strategies. Previous research has also detailed the various activities and factors that influence middle managers' strategy implementation behaviors. However, research has not yet established the middle manager activities that enable particular strategy implementation outcomes. Therefore, the link between manager activities and intended and unintended strategies has been insufficiently theorized (Friesl et al., 2021). We seek to address this gap in this paper.

We use a strategy-as-practice perspective (e.g., Johnson et al., 2007; Jarzabkowski, 2004; Jarzabkowski et al., 2007) to provide insights into the impact of middle managers' strategy implementation activities on intended and unintended strategy outcomes. This perspective is suitable because it attends to the "work" in strategy by individuals (Jarzabkowski and Spee, 2009; Whittington, 2006). It allows us to explore how middle managers' individual-level strategy implementation actions influence strategy implementation outcomes. Furthermore, it allows us to address how individual implementation activities create organization-level outcomes (Friesl et al., 2021). Our research question is: which middle manager activities result in strategy implementation in its intended or unintended form?

Methods

Despite extensive prior research on middle managers and their role in strategy implementation, our research question covers sufficient unknown territory to justify an exploratory research method. Therefore, we used qualitative interviews (Symon and Cassell,

Table 1
Informant characteristics.

ID	Informant title	Company sector and nationality	Strategic flexibility in sector	Manager location and gender
MM1	Director of Accounts	Pharmaceutical (USA)	Moderate	UK, male
MM2	Project Manager	Oil and Gas (UK)	Low	UK, male
MM3	Quality Specialist	Finance (Middle East)	Low	Middle East, male
MM4	Engineering Supervisor	Oil and Gas (Middle East)	Low	Middle East, male
MM5	Director of Oil and Gas Operations	Oil and Gas (Middle East)	Low	Middle East, male
MM6	Head of Operations	Finance (Middle East)	Low	UK, female
MM7	Director	Trading and Finance (Hong Kong/China)	High	Hong Kong, male
MM8	Chief Financial Officer	Oil and Gas (China)	Low	UK, male
MM9	Strategic Business Development	Pharmaceutical (USA)	Moderate	UK, female
MM10	Vice President Strategic Accounts	Digital-based marketing services (USA)	High	UK, male
MM11	Vice President Asset Management	Finance/Asset Management (West Africa)	Low	UK, female
MM12	Vice President	Bespoke Factory Equipment (UK)	Moderate	UK, male
MM13	Principal Quality Assurance Engineer	Retail fashion online	High	UK, male
MM14	Business Manager	Insurance (USA)	Low	UK, female
MM15	Merchandise Manager	Department store (UK)	High	UK, female
MM16	Research & Development Manager	Medical Devices (USA)	Moderate	Switzerland, male
MM17	Risk Manager	Financial asset managers (USA)	Moderate	UK, male
MM18	Global Vice President IS Delivery Management	Packaging dispensers (USA)	Moderate	UK, male
MM19	Head of Maintenance	Airline (UK)	Moderate	UK, male
MM20	Manufacturing Manager	Engineered components (USA)	Moderate	UK, male
MM21	Head of Sales and Strategic Planning	Online recruiting platform of publishing and media company (Germany)	High	UK, male
MM22	Director of Transition	Banking and financial services (UK)	Moderate	UK, female
MM23	Head of Marketing	Information provider (Japan-USA)	High	UK, male
MM24	Strategy and Operations Manager	Information provider (USA)	High	UK, male
MM25	Head of Research	Information provider (UK)	High	UK, female
MM26	Risk and Value Manager	Transport network and infrastructure (UK)	Low	UK, male
MM27	Regional Manager	Banking and financial services	Low	UK, male
MM28	Business Development Manager	High technology manufacturing (UK)	High	UK, male
MM29	Operational Quality Manager	Oil and Gas (Middle East)	Low	Middle East, male
MM30	Vice President for EMEA support services	IT security (USA)	High	UK, male
MM31	Organisational Performance Advisor	Oil and Gas (Middle East)	Low	Middle East, male
MM32	Business Development Lead	Publishing (UK)	Moderate	UK, male
MM33	Vice President	Investment management (USA)	Moderate	UK, female
MM34	Senior Operational Excellence Advisor	Oil and Gas (Middle East)	Low	Middle East, male
MM35	Vice President	Investment management (USA)	Low	UK, female
MM36	Vice President	Banking and financial services (USA)	Low	UK, male
MM37	Vice President	Investment management (USA)	Moderate	UK, female
MM38	Sales Planning Manager	Automotive (Germany)	Moderate	UK, male
MM39	Vice President Operations	Oil and Gas (China)	Low	South America, female
MM40	Operational Excellence Advisor	Oil and Gas (Middle East)	Low	Middle East, male

Note: The title of vice president in a financial services company is usually equivalent to a middle manager title in a non-financial company.

2012) to investigate middle manager activities. Furthermore, research using the strategy-as-practice lens often uses interview data (e.g., Balogun and Johnson, 2004; Balogun, 2006; Ahearne et al., 2014). Many other studies on middle managers and strategies have also used this approach (e.g., Brown and Eisenhardt, 1997; Beck and Plowman, 2009; Azambuja and Islam, 2023). In addition, interviews are helpful in learning about the lived experience of informants (van Manen, 2016; Seidman, 2019). As we did not know the details of the situated strategy implementation activities in advance, and because middle managers might not easily verbalize them, interview-based data collection enabled us to gather more information through the use of open-ended questions and probing (Seidman, 2019: 91–92). Surveys with predetermined questions and limited answering options would have been unsuitable in this regard.

We interviewed 40 middle managers who reported on 122 examples of strategy implementation. On average, middle managers each reported 3.05 strategies, ranging from one to five per interviewee. We analyzed their strategy implementation actions to examine their relationship to the outcomes of intended and unintended strategies.

Sampling

We aimed to provide comprehensive insights by capturing the various activities undertaken by middle managers in strategy implementation. Therefore, we sampled middle managers from many companies. We also used sampling criteria of parent company nationality, middle manager country of location, strategic flexibility of sector, job function, and manager gender (discussed below). Table 1 provides a detailed overview of the sampled middle managers.

Our research question required choosing middle managers tasked with implementing an identifiable intended strategy. We therefore recruited informants from large, profit-oriented corporations, where clear hierarchical structures and formal strategic plans are standard, to maximize the likelihood of the organizations having defined middle management positions. It was also more likely that middle managers would be tasked with relevant strategy implementations, evident in formal, written plans that required execution. We set the minimum size for parent companies of informants as $100 million in revenues so that the companies were sufficiently large to have defined roles for middle managers, a strategy, and formal strategy processes. A value of $100 million is arbitrary, but it was a useful number to qualify potential informants. We set no upper size limit because we did not expect companies beyond our minimum size to have significantly different middle management roles.

To sample widely, first, we varied parent companies' home countries to illuminate the different levels of autonomy that middle managers experience in deviating from intended strategies and the different acceptance levels of such actions. Some national cultures are more hierarchical than others (Hofstede, 2001; House et al., 2004) and offer middle managers less autonomy (Brodbeck et al., 2002). Many of the sampled middle managers ($n = 27$) worked for multinationals with primarily Western cultures because the home country of the parent headquarters was in Western Europe or the United States. Other managers worked for multinationals that had their headquarters in Asia ($n = 4$) or the Middle East and Africa ($n = 9$). Second, as the national culture of the manager's location can also influence their behavior (Shenkar, 2001; Shenkar et al., 2008), we varied the geographic locations of the middle managers. Thirty middle managers were based in the UK, and seven were based in the Middle East. Switzerland, Hong Kong, and a South American country hosted one middle manager each. Third, we sampled managers from different industry sectors because industries vary dynamically. The speed of industry change affects a firm's strategy consistency over time; strategy consistency is lower for firms facing continuous, rapid change (Bogner and Barr, 2000; Shimizu and Hitt, 2004; Brauer and Schmidt (2006). Therefore, middle managers implementing strategy in firms competing in rapidly changing environments may require more strategic flexibility because they place less emphasis on the realization of intended strategies (Hitt et al., 1998). In our sample, 17 middle managers worked for firms operating in sectors with low strategic flexibility (such as oil and gas and banking), 13 worked in sectors requiring moderate strategic flexibility (such as investments and retail), and 10 worked in sectors that demand high strategic flexibility (such as information and online services). Fourth, we sought middle managers responsible for different functions because functional areas have diverse scope for flexibility and changing intended strategies during implementation. The sample offers a significant variety of functions, which are evident in the middle managers' job titles (see Table 1). Fifth, we sampled different genders because of gender-related challenges in leadership (Peus et al., 2015; Benton, 2021; Trzebiatowski et al., 2022). In terms of gender, our sample contained 29 male and 11 female managers.

We relied on the first author's professional network to recruit informants. Her network included university alumni, former students in executive programs, attendees of professional events aimed at executives, and previous professional and business colleagues. We recruited from 30 companies, with 27 companies each providing one informant and three companies providing seven, four, and two informants. Our interviews continued until the data showed theoretical saturation, thereby suggesting that the primary constructs had been identified and that additional interviews were repeating prior patterns and concepts. The later interviews with middle managers did not reveal any additional activities.

We qualified informants through screening questions to ensure that they met the following three criteria. First, we followed a prior study's (Radaelli and Sitton-Kent, 2016) approach to determine whether informants were in middle management roles: informants needed to have subordinates reporting to them, and they needed to report to somebody else. They were required to be positioned between top managers and first-line supervisors. Second, we required informants to be responsible for implementing a strategy formulated primarily by superiors (Wooldridge et al., 2008), although the informants may have been involved in the formulation process. Third, they needed to be willing to speak freely about their experience of implementing strategies to ensure data quality.

No sampling criteria were set for the type of strategy being implemented, so the middle managers reported on different categories of strategies. These included functional strategies ($n = 64$), such as "risk management in energy trading" (MM08) or using "engineering to develop mobile payment solutions for retailers" (MM13); country or regional level strategies ($n = 9$), such as "country subsidiary strategy" (MM07 and MM14); and business-level strategies ($n = 49$), such as "global strategic plan" (MM01). This variation is helpful as different organizations will formulate strategies at different levels and adopt different approaches toward their implementation. Notably, the middle managers perceived their responsibilities to be the implementation of their part of each intended strategy.

Interview data collection

We chose a semi-structured interview format to ensure that we covered all the critical topics while allowing for probing, expansion, and exploration. Interviews lasted 60 minutes on average (minimum of 52 minutes and maximum of 90 minutes). All 40 interviews took place face-to-face: 32 were conducted in person, and eight via video call. All interviews were recorded and transcribed. We offered to anonymize both informants and their companies. Therefore, throughout the paper, we anonymized individual informants with a number based on the sequence in which they were interviewed (MM01 to MM40). To focus on middle managers' actions, we asked each informant to discuss only their personal behaviors.

We conducted four exploratory interviews to refine the data collection instrument. We then interviewed 40 middle managers for the main study. The final version of the interview protocol used questions identifying demographics and exploring strategy implementation activities. The questions on strategy implementation asked about a recent example of strategy implementation to reduce the risk of retrospective bias, aspects (if any) that were changed during implementation, including probing about what was changed and why, and any changes that were not formally approved in advance. We again questioned why and how this happened. Following the format of semi-structured interviews, the questions were supplemented by probing questions and more detailed discussions of the areas emphasized by the interviewees. This allowed us to capture data on strategies implemented as intended and unintended, which was necessary for answering our research question.

We increased the likelihood of open and honest answers by offering anonymity and not engaging with the wider organizations. Nevertheless, self-reports may involve memory errors. The risk of retrospective bias was reduced by asking informants to speak about recent experiences. Furthermore, the potential risk of self-justification or impression management was limited because many informants were open about their own satisficing and self-interested behavior. In addition, nearly all middle managers admitted to strategy deviations, offering face validity to our data. Therefore, we are confident in the trustworthiness of the data, a vital quality criterion of qualitative research (Pratt et al., 2020).

By collecting data about how informants recalled their motivations and actions during strategy implementation, we adopted an interpretivist perspective (Duberley et al., 2012). We took an emic approach and accepted middle managers' descriptions and discussion of their actions, a common approach in strategy research (e.g., Balogun and Johnson, 2004; Fiss and Zajac, 2006; Luscher and Lewis, 2008).

Data analysis

We took an abductive approach to data analysis. Abduction aims to find a middle ground between inductive and deductive methods (Thompson, 2022). Abductive research is neither data-driven nor hypothesis-driven but rather engages equally with empirical data and extant theoretical understanding (Rinehart, 2021; Timmermans and Tavory, 2012). This approach was useful because it allowed us to use the existing literature to develop an interview guide and coding procedure. Specifically, it allowed us to develop deductive, a priori, coding schemes and frameworks to structure the analysis (Boyatzis, 1998; Lochmiller, 2021) and to inductively conduct interpretive, subjective, and bottom-up reflexive analyses (Braun et al., 2019). Specifically, our abductive method used deduction to apply prior literature to design an interview guide and create an initial coding template, then induction to code the data and revise the coding template, deduction again to verify if there was a statistical significance in the differences between activities for intended and unintended strategy implementation outcomes, and back to induction to create hypotheses and develop our model.

Overall, our data analysis involved three main steps: (1) identifying first-order concepts, second-order themes, and aggregate dimensions, (2) comparing the activities of middle managers for intended and unintended strategy implementation outcomes, and (3) developing a model based on an analysis of the impact of activities on outcomes. Thereby, we classified the 122 strategies as intended or unintended and focused on how different activities relate to whether the strategy was implemented as intended or unintended. As part of our mixed abductive method, we therefore added a deduction stage by testing the statistical significance in the difference between the frequencies of the implementation activities for the two outcomes.

Identifying first-order concepts, second-order themes, and aggregate dimensions. We began by thematically analyzing the interview data (Saldaña, 2021). We applied multiple cycles of theme development (e.g., Shaw, 2019; Jaskiewicz et al., 2015). For the first cycle, we developed an initial coding list based on our literature review, including middle management strategy implementation activities and the outcomes of intended and unintended strategies. We quickly found that this initial list was insufficient to capture all relevant activities, triggering iterative rounds of coding to revise and expand the codes to arrive at the final first-order codes. For instance, the initial codes did not include activities relating to the use of middle manager accrued characteristics. As this analysis progressed, most first-order concepts became increasingly rooted in informants' responses, reflecting user-centric language.

Next, by relating the data to theory, we grouped the first-order concepts (i.e., middle managers' actions) into second-order themes (i.e., situated strategy implementation activities or activities in short). We followed some of Grodal, Anteby, and Holm's (2021) categorization steps for rigorous qualitative research, including the dropping, merging, splitting, and sequencing of categories to identify activity themes. Drawing on existing knowledge of middle managers and strategy implementation behaviors and practices, we clustered the strategy implementation activities into one aggregate dimension that reflected all activities.

Comparing middle manager activities for intended and unintended strategy implementation outcomes. As the research question relates to how implementation activities lead to different outcomes (intended and unintended strategies), we compared responses for these two outcomes, which we consider as comprising a second aggregate dimension of strategic outcomes. The strategy implementation outcomes were coded as an intended strategy if substantially implemented as intended and roughly on time. The outcomes were coded as an unintended strategy if the strategy was not implemented at all, significantly delayed, or implemented substantially differently from top management intentions. Of the 122 strategies examined, 30 were implemented as intended (24.6%), and 92 led to unintended strategies (75.4%). Table 2 includes illustrative quotations for this coding.

Based on this coding, we compared the frequencies of implementation activities across the 122 intended strategies. We noticed substantial differences in activities based on outcomes; therefore, we also used *t*-tests to verify the activities' statistical significance. Adding a quantitative analysis to a primarily qualitative approach allowed us to verify our interpretation. This aligns with the general advice for qualitative researchers to develop approaches that fit their work rather than rigidly following one method (Bansal et al., 2018).

We also examined whether the five sampling criteria and strategy categories (functional, country-, or business-level strategy) influenced the data patterns by systematically analyzing the findings for each factor. We did not detect any systematic pattern, except for the highly regulated financial services sector (with low strategic flexibility), reducing middle managers' scope for deviating from intended strategies. Furthermore, the partial duplication of companies (13 informants from three companies) allowed us to minimally assess company effects, of which we found none.

Model development. To theorize from our data (Cornelissen, 2017), we developed a model of middle manager activities in strategy implementation and outlined corresponding propositions for the primary relationships. We qualitatively analyzed relationships by coding instances in which a middle manager described how activities were related as well as how activities influenced strategy implementation outcomes.

Findings

Our findings reveal how the strategy implementation activities of middle managers relate to both intended strategies (30 instances, 24.6%) and unintended strategies (92 instances, 75.4%). This section introduces those strategy implementation activities that middle managers highlighted as leading to these outcomes. These are conceptualized using accrued characteristics, personal autonomy, cooperation, and coalitions. We also describe how activities and relevant actions differed depending on the outcome. Furthermore, we suggest propositions and theorize a model from our findings. Table 3 includes additional empirical evidence for each strategy implementation activity.

Activities related to using accrued characteristics

Some activities related to middle managers' individual-level characteristics, which we call the situated activity of "using accrued characteristics," a second-order theme. We found the use of multiple accrued characteristics; each can allow the middle manager to use activities when engaging with an intended strategy.

Draw on long experience. This concept refers to using general experience that is relevant to an intended strategy. Middle managers often had relevant experience in a specific business context that they deemed to be superior to the top manager's experience. This experience offered credibility that gave the middle manager autonomy and trust, allowing them to engage more freely with the intended strategy during implementation. For instance, one middle manager stated that it helped to develop context-specific expertise from previous experience and to be the "go-to" person in strategy implementation to gain their top manager's trust:

> "So, they wouldn't necessarily go and ask somebody else; they want me to opine on it because they trust my expertise and my judgment regarding all aspects of the services we provide to Africa." (MM22)

Another middle manager described the link between long experience, credibility, and increased leeway in strategy implementation:

> "So, if you're a credible, a really credible, individual with a history, you are given more autonomy. If you're an unknown and inexperienced, one would assume that you would be guided more closely." (MM01)

Notably, having extensive experience aided strategy implementation regardless of whether the outcome was intended or

Table 2
Outcomes of strategy implementation.

Outcome	Illustrative example quotations
Unintended strategy (92 strategies, 75.4%)	"If your heart is not in it, then you won't be able to implement it as well. I think you would have to check a tick box. So, you have to show that you're doing it … but this would be just for show." (MM20) "We've definitely put things on hold, delayed things. But we've never stopped a proposal going through." (MM35) "We agree with 90%–100% but there are about 10% that we don't. Sometimes they don't seem feasible to us." (MM29)
Intended strategy (30 strategies, 24.6%)	"You just deliver what you promise, is number one. And just get things done." (MM02) "What's required and rolling that out and creating a vision for your own team that's in line with everything that you're expected of, or expected to deliver, for want of a better term." (MM01) "So, we are delivering by that, and sometimes we are not free to decide this is good or this is right in the strategy. Maybe, in the beginning, we can give our feedback, give our opinion to adjust. It is already maybe taking it as feedback [to] keep in mind about the strategy in the beginning, but I think once the strategy started … it's not that easy just to change." (MM05)

Table 3
Additional quotations for strategy implementation activities by middle managers.

Using Accrued Characteristics	
Draw on long experience	"But that's a confidence level; how experienced they are in the sector, whatever it is. How long have they worked in that organization? A whole range of different things. And so what is their experience, how long have they been there, have they worked in the sector before in other bodies?" (MM7)
	"Yes, people have more experience. They've seen how, on the whole, different strategies have played out previously. Whereas, when people start their job, they are usually very limited in their experience. Most people who come into these types of organizations have been technically trained, but there is very little training on strategy or the outcome of business decisions. So, people at the top have had more experience; therefore [they are] more qualified to make those types of decisions." (MM12)
Draw on performance track record	"I think, yes, at the end of the day, it's about results, isn't it? The more you've got a track record of proving something the easier it is going to be to be trusted for future things." (MM14)
	"So, I suppose there was a track record as well as there being a network relationship. There was a track record of results I think which also counts for a lot in the business I was working in." (MM15)
Draw on trust by superior	"Well, obviously, you've got to build the trust of your bosses. So, if they've got trust in you, and if they know that you will refer to them if there is a problem, and tell them about it, then they leave you to it." (MM07)
	"I think it's both, I think coming into a senior position you do assume a position of trust. But it's that age-old question, is trust built or is trust given? And the answer to that is both, you start off with the base level of trust, but over time your output will ensure that you're automatically given more trust to increase your autonomy." (MM16)
Using Personal Autonomy	
Use own judgment	"It is difficult. Hopefully, when that strategy materializes, people can see the benefit. But sometimes there will be a situation where a strategy is pushed down, but the people executing their strategy have almost proved that there is no benefit in that strategy. And I think that is when you need to make that nasty judgment and say this isn't worthwhile for the business." (MM21)
	"If you were professionally qualified in something you need to feel you are exercising your professional judgment and choosing the right tools for the job." (MM26)
Use flexibility	"We have that autonomy and flexibility. I think that's maybe because of the way we're actually delivering the overall business results. You know, we're just allowed to get on with what we're doing." (MM31)
	"I am given the flexibility and autonomy to develop as to how we do that, how we put together our SWOT analysis, how we get together our strategies, and how we define those key initiatives to allow us to do what we need to do, and how we make a success. So, that is what we do and it is rolled out." (MM34)
Use power of position	"You know, so on one side do we give it autonomy, on the other side, we then ask you to own it. So, I guess that's that phrase. With great power comes great responsibility. So, this is exactly that. It gives you the power, if it goes wrong, fix it. And if it means you have to get up at 12 o'clock at night you have to get up." (MM13)
	"But I feel like I'm empowered to make decisions appropriately, you know, for my pay grade. If there was something that I thought was above my pay grade, then I would refer it to her. But, yeah, there's nothing documented that says I'm allowed to make decisions on XYZ or anything like that. It's just part of a job profile, a job description." (MM35)
Using Co-operation	
Work with team	"This is what we can do to have more thoughts, more expectations, evaluate with our teams then we can come as a team and we say, Oh Mr. President, Mr. Manager, we have one, two, three [thoughts] about your strategy and I feel we are not happy with this, so … It should be through a team." (MM05)
	"So you mustn't confuse autonomy, autonomy doesn't mean separation from the team, separation from management, it's got to be about teamwork. "(MM07)
Work with superiors	"I think, you know, I would seek advice, seek support, seek help from them, so really still honor that hierarchy, and just really keep a close relationship, regularly chatting and asking for feedback and working closely with them." (MM15)
	"I think we were lucky because my boss, the CMO, was very open about that and he was very supportive about that program. I think when the CMO changed, the new CMO did not see the value of that at all. So he stopped that program and dissolved the team." (MM23)
Using Coalition	
Seek powerful allies	"Sometimes there are difficult decisions that have to be made and they cannot be made by committee. So, sometimes there are – especially if there are opposing viewpoints – you can get into paralysis and gridlock. And at that point, in this case, our CEO has to make a decision." (MM12)
	"We managed to convince the CEO of that [Country X] operator to have the afternoon meeting, a 3 hour workshop with us, and when we walked into the room with my marketing colleague together with the accounts director for the account, the guy who was running this particular client account, he said to us, 'look at this room, in this room, there are 15 people, I only know 3 of them … Thanks to you, Marketing, you have opened the door to these 12 new people I have never met before.'" (MM23)
Create alliances	"I think in both cases what I've tried to do is bridge the gap between the way, I think leadership sees things a certain way and customers or staff can see it in a different way and often there's a void. So, if you can bridge that void and help both teams, or both stakeholders, to see it from the other perspective and give them solutions." (MM10)
	"But that was all about alliance; that was all about getting in touch with the HR guys and agreeing together that it would be a good thing to do because you would make our plan much more credible." (MM23)

unintended. One middle manager explained the connection between drawing on long experience and strategy deviation:

> "The credibility to change the strategy, it is the knowledge and experience together. So, some time ago, we have noticed in my department that if someone is experienced, he is credible, but now experience is not enough. If someone [is] knowledgeable and experienced, this is the credibility to change." (MM05)

Another middle manager emphasized that he had to compensate for his lack of relevant experience to implement an intended strategy:

> "I struggled getting Commercial on board at the time. I didn't have an example that I could copy. And my boss at the time was such an iconic person that everyone recognized as the person to go to even though he wanted to get away from that

> responsibility, and he had shifted it onto me. People were still going to him, and so I had to really build my persona within the business so that I could get traction from the Commercial team." (MM25)

Draw on good past performance. This concept refers to middle managers using their demonstrated track record of delivering against targets and objectives that are visible to top managers. Reflecting on what facilitated success in strategy implementation, one middle manager emphasized the importance of their past performance:

> "So, I think it is just through the level of work that I have carried out and completed, especially the way you operate on past performance." (MM21)

Good past performance helped middle managers during strategy implementation because it allowed others to feel confident in their actions. This allowed middle managers to exercise autonomy in strategy implementation, as expressed by one interviewee:

> "I think it just means it's easier and quicker to implement change because there is less red tape. It's easier to get buy-in if you can reference previous success." (MM06)

Draw on trust by superior. This refers to a middle manager having a trusting interpersonal connection with their top manager and other managers in senior ranks that they mobilize during strategy implementation. Heyden et al. (2017) discuss top managers giving "support" to middle managers in the context of change. Some middle managers mentioned that a good relationship allowed them to gain their top manager's trust, thereby giving them the autonomy to implement strategies:

> "So, with the current supervisor, there is a really great relationship, for the most part. I do feel because there are only two of us in the UK, and I don't blame him, but he'll take the best bits of work and allow me to be autonomous for the bits he doesn't really want." (MM8)

A trusting relationship with their top manager gave middle managers more say in strategy implementation. One middle manager discussed a strategy that had been modified:

> "We had a really good relationship, and there was a large amount of trust there. I would tell him my ideas, and I never felt that he was making the decision. It was more a joint discussion, and then we would move forward with things." (MM09)

Another middle manager was completely trusted by her superiors to implement strategies as she saw best:

> "… they [the Chinese executives] have to sign documents in Spanish, and they don't know one word in Spanish. They don't know who to trust. So, how can you get them that they can trust you? And I think the only way is to tell them the truth, to be very honest, to tell them in simple words. So, I think this has created a bond." (MM39)

Having introduced the use of three accrued characteristics—long experience, good past performance, and trust by superiors—the following section discusses their prevalence in the two strategy implementation outcomes.

Frequency of using accrued characteristics. The first block of Table 4 shows the frequency of each activity in the two outcomes—intended and unintended strategies—across the 122 strategies in our sample and the *t*-test statistical assessment of the difference between them.

Notably, the use of accrued characteristics were prevalent for both strategy implementation outcomes, ranging from 70% to 87%. This suggests that drawing on accrued characteristics is central to middle managers' strategy implementations. Furthermore, there was little difference in the use of accrued characteristics between the two implementation outcomes (*t*-test not significant). This implies that these accrued characteristics enable strategy implementation regardless of whether a strategy is implemented as intended or unintended. This results in the following propositions.

Table 4
Comparison of middle managers' strategy implementation activities.

	Unintended strategy (%)	Intended strategy (%)	*t*-test statistic	
	n = 92	n = 30		
Using accrued characteristics				
Draw on long experience	76	70	0.63	n.s.
Draw on good past performance	85	87	−0.27	n.s.
Draw on trust by superior	75	70	0.52	n.s.
Using personal autonomy				
Use own judgment	92	7	15.87	*
Use flexibility	88	3	17.19	*
Use power of position	84	33	5.26	*
Using co-operation				
Work with team	66	90	−3.18	*
Work with superiors	27	87	−7.58	*
Using coalitions				
Seek powerful allies	40	7	4.85	*
Create alliances	66	13	6.60	*

* with degrees of freedom = 29, statistics >2.46 are significant at $p < 0.01$ (2-tail); n.s., not significant.

Proposition 1. *The use of accrued characteristics by middle managers—extensive experience, a good performance track record, and trust by superiors—has similar effects on implementations that result in intended and unintended strategies.*

Activities related to using personal autonomy

Another set of strategy implementation actions related to the second-order theme of using personal autonomy.

Use own judgment. Middle managers have the autonomy to use their judgment to assess a strategy's soundness and to decide whether or not to implement the strategy as intended. One respondent explained:

> "You cannot accurately forecast everything. So, there are things that come in, and you have to make a judgment call as long as it is not outside the strategy. You might not have considered it at the planning stage, but as long as it complements what you are trying to do, you can go ahead." (MM11)

When middle managers elaborated on how they used their personal judgment during strategy implementation, many middle managers discussed being allowed to prioritize and focus on specific aspects of strategy implementation. In the following example, a middle manager was allowed to prioritize as long it was done with consideration for colleagues and the organization's overall strategy implementation remained aligned:

> "So, you have to be able to prioritize; you have to be able to plan your work. You should be able to have the end in mind, what you're trying to achieve, and how you're going to do it. You need to be methodical as well as structured, as well as adaptable, so you can adapt your approach. All this requires self-autonomy and being able to prioritize what you need to do to deliver those results. Now, if you cannot exercise personal autonomy with respect and consideration to others, you will not be successful in this organization." (MM31)

This exemplifies how middle managers use their own judgment to execute intended and unintended strategies.

Use flexibility. Some middle managers were also given the flexibility to make small changes to strategies. This flexibility could take the form of "translating" intended strategies, as one middle manager stated:

> "You're looking at very much adhering to it. But to adhere to it, you might need to change what you're doing, or it's a different translation. So, a strategic direction translation as translated into my team might be very different than the team next to me." (MM06)

Middle managers were also allowed to make some changes to strategies:

> "The financial targets weren't flexible, but the strategy in order to achieve those targets could adapt or flex where necessary." (MM09)

In summary, middle managers can apply flexibility on a selective basis to obtain different outcomes.

Use power of position. If making minor adjustments to the intended strategy was insufficient, some middle managers used their position and power, especially their role autonomy and control over resources, to decide whether to act on an intended strategy. One middle manager was very explicit about her power to affect strategy implementation:

> "I still firmly believe the middle manager is the most powerful individual that can either prevent or make something from happening." (MM01)

Another middle manager stressed his power to implement an intended strategy:

> "Our principles: a team should have complete autonomy to listen to production and have the power, have the knowledge, and have the ways and means to do that." (MM13)

Some middle managers had the power to prevent an intended strategy from being implemented:

> "You have the power to stop some investment decisions, but it has to be evidence-based." (MM17)

Two middle managers discussed how they used their power over resources to implement a strategy or deviate from it:

> "Yes, so we had a lot of money, we had a lot of resources, we could attract the best people in the market." (MM02)

> "I guess because of the resources that we have, there has been a key focus on making sure that they are engaged and that they are involved, which means giving them autonomy and giving us more autonomy." (MM10)

One middle manager exercised her power and autonomy to take action in their interest within her core capabilities. This allowed her to be engaged and to use her knowledge and skills:

> "Yes, they fall to the bottom of the queue because I had autonomy to do the things that I felt were the most synergistic with what they were interested in. That's where the sweet spot was for me because I was engaged, I was knowledgeable about it, I could impact the company, I could apply my framework, so they let me get on with it and do that." (MM09)

In summary, middle managers can use their positional power selectively to obtain their desired outcome.

Frequency of personal autonomy activities. The second block in Table 4 shows the frequency of the three personal autonomy activities for the two outcomes across the 122 strategies. Notably, these activities were significantly more prevalent in unintended strategies, ranging from 84% to 92%, compared with intended strategies, ranging from 3% to 33%. All corresponding *t*-test statistics were significant, corroborating the conclusion that how middle managers' activities relate to personal autonomy varies across strategy implementation outcomes. Combined with our qualitative data presented above, this shows that if middle managers choose to deviate from an intended strategy, they must increase and leverage their personal autonomy during strategy implementation. This leads us to suggest the following.

Proposition 2. *Middle managers will use personal autonomy activities—their judgment, flexibility, and position of power—more when deviating from an intended strategy than implementing it as intended.*

Activities related to using cooperation

The following middle manager strategy implementation activities involve cooperation. This may involve middle managers collaborating with colleagues in their team (downward) or with their superiors (upward) in the process of implementing a strategy.

Work with team. This refers to how middle managers work with their teams to implement or deviate from intended strategies. It highlights the downward influence of middle managers in strategy implementation. In our study, all middle managers operated in teams, and many found it necessary to adapt strategies to obtain team support and make it more relatable, as explained by one informant:

> "I think you can change it in the sense that you can make it more relatable. Let's say it might not necessarily be the strategy employed at one level is relevant or relatable to what you're doing, so the value of having conversations and say, 'OK, this is where we want to get to; this is how I can make that happen in my area." (MM03)

Middle managers also sought an agreement to align the deployment of the strategy, for example, if the proposed strategic change was interdepartmental:

> "If it was something that affected others, then, of course. You need to have a structure in place to make sure that you are all in alignment with how you're deploying a strategy. But if it's within my own team, then I have autonomy to create a risk framework to create the structure around deploying the strategy." (MM06)

Some middle managers worked with their own or other teams to implement a strategy:

> "It's an implicit understanding of who has the roles and responsibilities, and then I will be able to relay back to management, 'this is why – this is what it means.' So, we're looking at taking this strategy, relaying it to my team: this is what it means for my team." (MM06)

Another middle manager felt that it was important to influence and motivate team members through exemplary leadership. This meant it was possible to deviate from a strategy:

> "The reality is, we have moved away from the command and control organization where people bark orders at people, and then they expect everyone to do stuff, right? Even if people are reporting to you, you have to be able to influence them to stay motivated to achieve goals. And as a leader, part of your responsibility is to motivate and influence people." (MM22)

Work with superiors. This concept describes how middle managers work with their superiors to implement or deviate from an intended strategy and demonstrates their upward influence in strategy implementation:

> "If they [other top managers] say 'no,' realistically, that's it; it's their call. However, what will happen then is, I will report that back to New York, my boss in New York, and then there could be pressure put on them in a slightly different way. They probably wouldn't say no." (MM01)

Middle managers worked with their superiors to deviate from an intended strategy. One informant described how this might happen:

> "And at those board meetings, I present what is going on and things that we need to address. So, in terms of autonomy, I don't necessarily come up and change the strategy, but I will have to present why it needs to be changed and then get a vote." (MM11)

Other middle managers would specifically look for, or even create, an opportunity for their top managers to be receptive to deviations from an intended strategy:

> "You have to choose the right moment … So, I took him out for breakfast, and we had a breakfast meeting about it, and we talked about it, and he was receptive … there's formal meetings for the numbers and processes, but there is an informal opportunity to shape the direction and strategy through relationships and through empathy and through understanding people's position." (MM10)

Frequency of using co-operation activities. The third block of Table 4 shows the frequency of each co-operation activity for the two outcomes across the 122 intended strategies. We found statistically significant differences: middle managers often work with their team (90%) and their top manager (87%) when implementing strategies as intended. In contrast, when deviating from an intended strategy, middle managers work less downwards with teams (66%) and much less upwards with top managers (27%). This suggests that middle managers seeking to deviate from an intended strategy co-operate less across organizational levels. Therefore, we suggest the following.

Proposition 3. *Middle managers will make less use of co-operation activities—working with teams (downwards) and superiors (upwards)—when deviating from an intended strategy rather than implementing it.*

Activities related to using coalitions

The final set of activities relates to how middle managers use their networks to create coalitions, which extend beyond their personal autonomy and immediate team or superior to encompass working with the wider organization. To do this, middle managers can seek powerful allies or create alliances.

Seek powerful allies. This involves a middle manager realizing the need for powerful allies higher up in the organization to obtain support for strategy implementation. A middle manager explained how he turned his top manager into a powerful ally:

> "I gave him [my boss] some feedback on things that we could be doing better as a team, and he was very receptive to that, and he said, 'let's go and implement it; you have the ability to go and do that, go and put it into play.' And it's not something that's just generally under my area, but it's something that I felt that we could do better at." (MM10)

Another middle manager described the importance of being perceived as working with top executives. He stated that this would minimize most potential refusals from others:

> "Well, it helps that the request to … [execute] a strategy came from the COO, I'll be honest. Because people know that it's him that asked me to do it, so I don't get a lot of no's. 'I'm not going to help you,' because everyone knows that I'm representing someone quite powerful, much bigger than me. So, I've often told my own staff, managers, when I'm coaching them, developing them, 'don't play the authority card very often.'" (MM30)

Create alliances. This refers to middle managers forming alliances across unit boundaries to implement strategies. There were many opportunities for such cross-unit alliances for middle managers in large and complex organizations:

> "Rather than autonomy, I am thinking of alliance, an internal alliance with people working together either formally or informally to get something done. So, I think for me, one of the big things I was very, very keen on at [company] was to involve the HR [human resources] community." (MM23)

One middle manager created alliances and ensured all key stakeholders were on board before presenting her strategy implementation plan for approval:

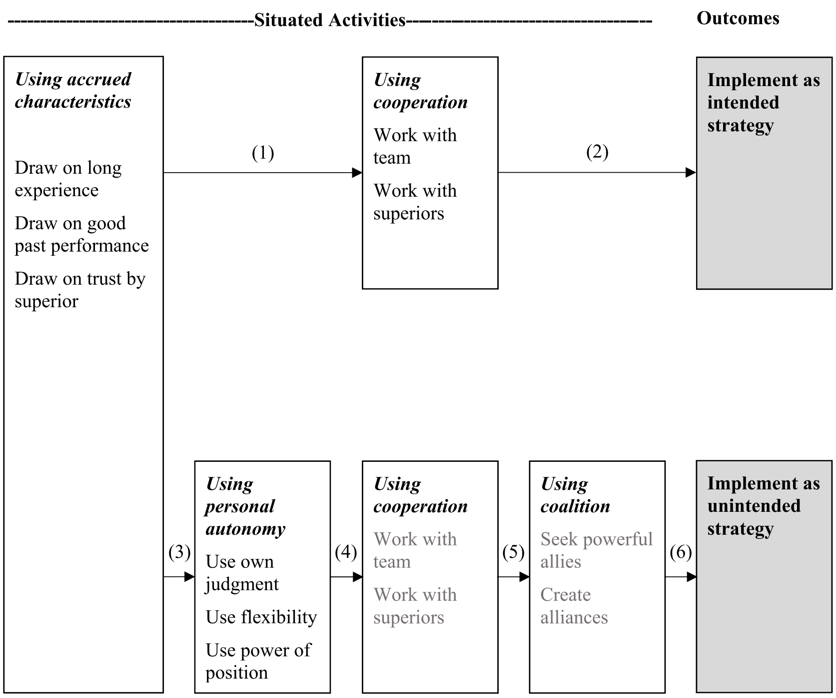

Fig. 1. Model of middle manager activities in strategy implementation. Note 1: Second-order themes are shown as bold headings within each box, with supporting first-order concepts, within each box. Note 2: Concepts in black font show high frequency of use, concepts in gray font show medium frequency at < 67%.

> "I would involve all my key stakeholders along the way with decision-making. I asked for a woman, who I really respected, to be my informal mentor so that I had a sounding board outside of the people directly related to my particular area of the business … It was an unwritten part of my role that I needed to have everyone, all the directors, on board with what I was presenting." (MM15)

Frequency of using coalition activities. The fourth block of Table 4 shows the frequency of these activities in each of the two outcomes across the 122 intended strategies. Again, we found statistically significant differences in the use of these activities for each of the two strategy implementation outcomes.

Notably, the two coalition-building activities were much more prevalent in unintended than intended strategies. A total of 40% of unintended strategies involved middle managers using internal alliances, but this occurred in only 7% of the intended strategies implemented by middle managers. Similarly, middle managers made extensive use of external alliances for unintended strategies (66%) but did so less commonly when implementing strategies as intended (13%). This suggests that middle managers use coalitions beyond cooperation with their immediate team to deviate from strategies because such alliances allow them to work around top managers' strategic intentions. In contrast, implementing strategies as intended requires fewer organizational alliances or coalitions. Therefore, we propose the following.

Proposition 4. *Middle managers will make more use of coalition activities—seeking powerful allies and creating alliances—when deviating from intended strategies than when implementing strategies as intended.*

A model of middle managers' strategy implementation activities

Building on these detailed findings about middle managers' strategy implementation activities, we develop a theoretical model that suggests how various situated activities relate to each other and the two strategy implementation outcomes (see Fig. 1). Fig. 1 illustrates the four second-order activity themes using bold headings within each box, plus the underlying first-order concepts.

Logically, the model begins with middle managers using their accrued characteristics, which exist before they are tasked with implementing strategy. As shown in Table 4, attaining strategy implementation outcomes requires all three accrued characteristics (as argued in Proposition 1). Using the three accrued characteristics—long experience, good past performance, and trust by superiors—gives middle managers vital scope for agency in strategy implementation (paths 1 and 3 in Fig. 1). Our earlier discussion shows how middle managers used these characteristics to implement or deviate from intended strategies.

As there were substantial differences in how other activities were used, depending on the strategy implementation outcome, our model (shown in Fig. 1) outlines two pathways, one for each outcome. To implement strategies as intended, middle managers co-operate by working with their team and superiors (as argued in Proposition 3 and shown in path 2). Therefore, in our model, the co-operation activities mediate the relationship between middle managers' accrued characteristics and their implementation of strategies as intended. Middle managers must take these actions to move from intention to realization. Even with strong accrued characteristics, middle managers do not implement strategies in isolation.

Our model depicts how middle managers must mobilize a broader spectrum of activities when deviating from intended strategies. This is shown in the bottom half of Fig. 1. Middle managers use personal autonomy activities, including their own judgment, flexibility, and position of power, when they deviate from an intended strategy (see Proposition 2 and paths 4, 5, and 6). Using their personal autonomy allows middle managers to directly implement or deviate from intended strategies without persuading other actors. Interestingly, middle managers co-operate less when deviating from an intended strategy than when implementing a strategy as intended (see Proposition 3). This suggests that middle managers attempt to circumvent their top manager's influence and power as they may be skeptical about or resistant to strategy deviations. If middle managers require help to deviate from an intended strategy, they implement coalition activities by seeking powerful allies and creating alliances (see Proposition 4 and path 6). Even when using strong accrued characteristics, they need the additional power of allies and alliances to act against a top manager's intentions.

Discussion

This study explored the situated activities of strategy implementation from a middle manager perspective. Our research question was: which middle manager activities result in strategy implementation in its intended or unintended form? Based on interviews with middle managers on the implementation of 122 strategies, we uncover activities that jointly enable strategy implementation. We also demonstrate how these activities are similar and different across the two main strategy implementation outcomes of intended and unintended strategy. We develop a theoretical model of the activities undertaken by middle managers in strategy implementation (Fig. 1). These findings offer two main contributions. First, we contribute to the literature on strategy implementation by conceptualizing a critical link in how different strategy implementation outcomes come about. Second, we contribute to the middle management perspective on strategy by extending the understanding of the various activities that explain how middle managers engage with strategy.

Contribution to theory on middle managers and strategy implementation

Substantial research on middle managers and strategy implementation has outlined various implementation activities, such as translating strategy (Boyett and Currie, 2004); sensemaking and sensegiving to interpret and sell strategic change at the organizational interface (Rouleau and Balogun, 2011); reframing strategy (Sillince and Mueller, 2007); issue selling (Ling et al., 2005); overcoming knowledge distribution challenges and mastering solution development (Tippmann et al., 2013; Tippmann et al., 2014); adapting strategy in evolving environments (Guo et al., 2017); and structure and process matching, resource matching, monitoring, framing, and negotiating (Friesl et al., 2021). However, how middle managers combine activities to implement strategies remains unclear. To address this, our study reveals the logical progression in middle managers' use of four sequential layers of situated activities that enable the implementation of intended and unintended strategies (see Fig. 1). Middle managers first use their accrued characteristics (drawing on long experience, good past performance, and trust by superiors), and may then use their autonomy (their judgment, flexibility, and power of position), before using co-operation with their immediate co-workers (working with both their teams and their superiors), and, then, as a last resort, using coalitions (seek powerful allies and create alliances).

By using the accrued characteristics of middle managers as a starting point, and considering these alongside the logical progression of situated activities, our model expands the range of strategy implementation activities identified in earlier studies and emphasizes the role of human agency in strategy implementation. This is central to the strategy-as-practice perspective (Golsorkhi et al., 2015). Previous studies have noted the impact of individual-level characteristics on middle managers' strategic behavior. For instance, Dokko et al. (2009) show that middle managers new to their position or company may not be as effective in implementation practices as middle managers with longer tenure because of their limited role-relevant experience. More generally, management experience has been shown to influence strategic activities (Elia et al., 2021; Bendig et al., 2017), and it may influence middle management actions in strategy implementation. Middle managers' qualifications (e.g., Beatty and Lee, 1992), career ambitions, political skills (Grosser et al., 2018), and loyalty to the business unit and to subordinate colleagues (Ahearne et al., 2014), as well as personal traits such as entrepreneurialism (e.g., Fulop, 1991) have also been found to influence their strategic behavior. In general, the importance of individual middle managers' characteristics is supported by Mollick (2012)'s large sample study, which finds that middle managers' personal identities have a more significant influence on firm performance than organizational factors. Extending these insights, we find that the *use* of accrued characteristics, rather than their availability, is a critical strategy implementation activity.

As all the middle managers worked in large multinational companies, many needed to apply the cooperation and coalition activities highlighted in Fig. 1 across geographically dispersed actors. As listed earlier only 9 of the 122 strategies were explicitly at the sub-global scale, being national or regional, and most of the other strategies implied need for dispersed coordination. However, only a few middle managers spoke explicitly of international issues, probably because the interview guide did not probe into international management issues. Yet, some middle managers spoke of greater autonomy coming from geographic distance from their manager and their ability to generate more viable ideas than their HQ senior managers. These findings provide some support for the role of middle managers in subsidiaries when connecting dispersed initiatives and generating ideas that do not stem from headquarters (Fourné et al., 2014; Decreton et al., 2023). This challenge of dispersion will get greater with increasing digitization and globalization of management and leadership tasks and roles (Christie and Tippmann, 2024).

Last, our findings on how middle managers choose different activities to implement or change intended strategies also support Weiser et al.'s (2020) call for research to examine the continuous interplay of conceptualizing and enacting strategies, the roles of different actors, and the coordination of strategic action. In our study, managers tried multiple paths and actions to remake intended strategies during their implementation.

Explaining strategy implementation outcomes: intended and unintended strategies

Our findings differentiate the activities of middle managers across two strategy implementation outcomes: intended and unintended. This extends prior studies that have focused on either deviated or unintended strategies (e.g., Meyer, 2006; Ates et al., 2020) or strategies implemented as intended (e.g., studies reviewed by Wang et al., 2017). Our study simultaneously relates situated activities to both strategy outcomes, enabling the comparison of strategy implementation activities between them.

As shown in Fig. 1, both intended and unintended outcomes depend on middle managers' use of accrued characteristics. In addition, both outcomes depend on co-operation within the immediate team; however, middle managers work with both subordinates and superiors when delivering intended outcomes, while they work less with superiors when delivering unintended outcomes (Table 4). The most significant difference between intended and unintended strategy outcomes is the use of personal autonomy activities. Middle managers use personal autonomy to deliver unintended outcomes. These differences exist because personal autonomy allows managers to directly implement or deviate from intended strategies without persuading other players, particularly their superiors.

Our study reveals a generic set of activities by examining strategy implementation activities for both outcomes. Some prior research on unintended strategy implementation has identified the prevalence of activities with negative connotations, including "sabotage," "foot-dragging" (Guth and Macmillan, 1986: 314), and opportunism (Sillince and Mueller, 2007). Observed in unintended strategy implementation, these activities focus on one strategy implementation outcome. Our findings reveal activities that can explain both strategy implementation results.

Limitations and opportunities for future research

Our study has several limitations. First, our sample means that our findings are relevant only to large for-profit organizations with articulated strategies. Middle managers in firms with other types of governance, such as state-owned or family-owned, may have more or less autonomy than experienced by the middle managers in our study. State-owned firms are typically more bureaucratic, while family-owned firms are typically more vision-driven, in both cases giving less autonomy in strategy to middle managers. Second, employing a cross-sectional research design limited the opportunity to explore the research phenomenon longitudinally. Third, the decision not to consider other stakeholders, such as top managers and subordinates to middle managers, as data sources limits the diversity of perspectives considered in this research. Fourth, we did not examine the possible subsets of unintended strategy outcomes. Fifth, we recognize the limitations of using abduction rather than a purer research method, including the greater scope for researcher discretion as to when to use the deductive or inductive aspects of abduction.

Given these limitations, we offer several opportunities for further research. First, a quantitative study could test our propositions and model. Second, our research has highlighted the importance of the relationship between the middle manager and the supervising top manager. Further research could recruit middle manager–top manager dyads to examine the micro-level components of this relationship and its effects on strategy implementation. Third, a future study could examine possible subsets of unintended strategy outcomes such as avoidance, delay and different types of change. Fourth, a future study could take place in firms with other types of governance such as state-owned and family-owned.

Managerial implications

Our study provides lessons for both middle managers and top managers. To improve their strategy execution, middle managers should build up and leverage the accrued characteristics we have identified: long experience, good past performance, and being trusted by their superiors. Furthermore, middle managers should be aware of the range of activities that they can use to execute strategy. Top managers should also understand the methods middle managers use to implement or deviate from their intended strategies. This awareness will allow top managers to engage with middle managers early on in the implementation process if they perceive inappropriate deviation. Also, most middle managers are tasked to implement more strategic activities than they can manage with the available time and resources. In consequence, middle managers are often motivated to use and increase their autonomy to not implement strategy as intended. This may even be more so the case for strategies that are hard for a middle manager to implement. In such cases, top managers should be alert to how to help middle managers use these situated activities in ways that support implementation of the intended strategy rather than deviate from it.

Conclusion

Middle managers are key players in strategy implementation. Our study has highlighted which of their actions influence strategy implementation in organizations. Therefore, our study offers some valuable insights into why and how strategies are implemented as intended or unintended.

CRediT authorship contribution statement

Annabel Christie: Conceptualization, Data curation, Formal analysis, Funding acquisition, Investigation, Methodology, Project administration, Resources, Software, Writing – original draft. **Esther Tippmann:** Conceptualization, Methodology, Validation, Writing – review & editing.

Declarations of interest

None.

Data availability

The data that has been used is confidential.

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Annabel Hana Christie is Lecturer in Business Strategy at Royal Docks School of Business and Law, University of East London, UK. She holds a PhD from Cranfield School of Management, completing in 2020 her thesis "Why and How Do Middle Managers Use Autonomy in Strategy". Her research focuses on the topic of internal organizational barriers to the effective implementation of a company's strategy. She also holds a law degree from the London School of Economics and Political Science and a Master in Tax Law from the University of London. A UK qualified lawyer, Annabel has worked in the financial and property sectors for top UK law firms and in a hedge fund.

Esther Tippmann is Professor of Strategy at University of Galway, Ireland. Her interests revolve around the strategic challenges of internationally operating organizations. She has worked with several scaling firms and multinational corporations in Ireland, France, U.K. and the U.S. She has been published in the Strategic Management Journal, Journal of International Business Studies, Organization Studies, Journal of World Business, Journal of Management Studies, Global Strategy Journal, Harvard Business Review and Sloan Management Review, among others. Esther serves as Senior Editor for the Journal of World Business and on the editorial boards of the Journal of International Business Studies and Long Range Planning.