Introduction: What Is Strategy as Practice?

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Strategy as Practice as a Research Approach

Strategy as Practice (SAP) has emerged as a distinctive approach for studying strategic management, strategic decision-making, strategizing, strategy-making and strategy work (Jarzabkowski, Balogun and Seidl 2007; Johnson, Melin and Whittington 2003; Whittington 1996). In recent years, SAP research has become more popular than ever (Jarzabkowski, Seidl and Balogun 2022; Kohtamäki et al. 2022). SAP provides not only an organizational perspective into strategic decision-making but also a strategic angle for examining the process of organizing, and thereby it serves as a research programme and social movement for connecting contemporary strategic management research with organizational studies. This third edition of the Handbook offers an updated and forward-looking reflection about what we have learned and how to make the most out of this powerful perspective in future research.

SAP can be regarded as an alternative to the mainstream strategy research via its attempt to shift attention from a focus on performance alone to a more comprehensive, in-depth analysis of what actually takes place in strategy formulation, planning, implementation and other activities that deal with the thinking and doing of strategy. The roots of SAP research can be linked with strategy process research (Mintzberg 1973; Mintzberg and Waters 1985; Pettigrew 1973), but with its focus on practices, it enables us to conduct theoretically sophisticated in-depth analyses of strategy work. Because of its micro-level focus, studies following the SAP agenda tend to draw on theories and apply methods that differ from the usual practices of strategy scholars. In this way, SAP research can contribute to the development of strategic management as a discipline and body of knowledge with new theoretical ideas and methodological choices.

It would, however, be a mistake not to link SAP research to the broader 'practice turn' in contemporary social sciences. In fact, 'practice' has emerged as a key concept for understanding central questions about how agency and structure, and individual action and institutions are linked in social systems, cultures and organizations (Bourdieu 1990; de Certeau 1984; Foucault 1977; Giddens 1984; Schatzki 2002; Sztompka 1991). This practice turn is visible in many areas of the social sciences today, including organizational research (Brown and Duguid 1991; Feldman and Orlikowski 2011; Nicolini 2012; Nicolini, Gherardi and Yanow 2003; Orlikowski 2000). And with SAP it has also been utilized to enrich our understanding of organizational strategy.

'Practice' is a very special concept in that it also allows researchers to engage in a direct dialogue with practitioners. Studying practices enables one to examine issues that are directly relevant to those who are dealing with strategy, either as strategists engaged in strategic planning or other activities linked with strategy, or with those who have to cope with the strategies and their implications. By so doing, studies under this broad umbrella promise to accomplish something which is rare in contemporary management and organization research: to advance our theoretical understanding in a way that has practical relevance for managers and other organizational members.

When the SAP approach emerged more than two decades ago, their proponents had a choice: they

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could either develop it into a clearly defined but narrow theoretico-methodological perspective, or they could grow it into an open and versatile research programme that is constantly stretching its boundaries. As recounted in a recent review article (Jarzabkowski, Seidl and Balogun 2022), the first generation of SAP scholars opted for the latter alternative, which they reinforced with the slogan 'let a thousand flowers bloom'. This Handbook, and particularly this third edition, is meant to underline this explicitly pluralistic ethos of SAP. By spelling out and elaborating various alternative perspectives on SAP, we wish to contribute to the expansion and further development of this research approach. Although there stands a risk of eclecticism and ambiguity, we believe that the benefits of theoretical and methodological innovation and continued discussion outweigh such concerns. Our view of SAP emphasizes the usefulness of studying 'practical reason' – the starting point in Dewey's (1938) or Bourdieu's (1990) analyses of social practice. According to this view, we must focus on the actual practices that constitute strategy and strategizing while at the same time reflecting on our own positions, perspectives and practices as researchers. This includes a need to draw from, apply and develop various theoretical ideas and empirical methods.

This Handbook represents a unique collection of ontological, epistemological, theoretical and methodological perspectives as well as work on substantive topic areas on SAP written by leading scholars in the field. When compiling the Handbook, we as editors had three specific goals in mind. First, as explained above, we wished to open up, even more extensively than in the second edition, the multiple ways in which academics from other perspectives think about and conduct SAP research. This is shown in the multiplicity of approaches presented in our five parts, complementing each other in multiple ways. In this endeavour, we emphasize the need to study both concrete instances of organizational strategizing and broader issues, such as the institutionalization of strategy as a body of knowledge and praxis (Seidl and Whittington 2014). Second, we were determined to promote critical thinking. This is important to make sure that SAP research does not dissolve into a restricted study of top management but includes analysis of how others contribute to strategizing and how they at times may resist strategies and their implications. Moreover, reflection on strategy as a body of knowledge (Knights and Morgan 1991) and praxis (Whittington 2006) that has all kinds of power implications must continue. Third, unlike some other handbooks, we emphasize the future. Thus, the chapters included in this book not only provide overviews of what has already been done in this field but also spell out theoretical or methodological ideas for the future.

The Practice Turn in Social Sciences

The purpose of this section is to highlight central ideas in the so-called practice turn in social sciences. A comprehensive review of the various perspectives is, however, beyond the scope of this Introduction (see Nicolini 2012). To begin with, it is important to note that representatives of several schools of thought have contributed to our understanding of the central role of practices in social reality. These include philosophers (Dreyfus 1991; Foucault 1977; Schatzki 2002; Tuomela 2005; Wittgenstein 1951), sociologists (Bourdieu 1990; de Certeau 1984; Giddens 1984), anthropologists (Ortner 2006), activity theorists (Engeström, Miettinen and Punamäki 1999; Vygotsky 1978), discourse analysts (Fairclough 2003), feminist scholars (Martin 2003), and many others.

Although there is no single motive behind this collective interest, four things should be emphasized. First, a focus on practice provides an opportunity to examine the micro level of social activity and its construction in a real social context or field. Thus, a practice approach allows one to move from general and abstract reflection on social activity to an increasingly targeted analysis of social reality. This is not to say that all practice-oriented research would have to engage in ethnographic research, discourse or conversation analysis, activity theory, or any other type of micro-level empirical study. On the contrary, a key part of the practice literature has been very theoretical in nature. Nevertheless, the

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advantage a practice approach brings to areas like strategy lies predominantly in its ability to elucidate the micro-level foundations of social activity in a particular setting – in either theoretical or empirical studies. Furthermore, the flexibility of the practice view makes it possible to analyse activities from multiple angles. Activity can be studied as more or less intentional action, cognition, embodied material practice, discourse or text – and the list does not stop here.

Second, the practice approach breaks with methodological individualism by emphasizing that activities need to be understood as enabled or constrained by the prevailing practices in the field in question. Thus, a practice approach to strategy should not merely focus on the behaviours or actions of managers but seek to examine how these behaviours or actions are linked with prevailing practices. A fundamental insight in practice theories is that individual behaviours or actions – however they are defined – are always related to the ways in which social actors are supposed to think or feel or communicate in and through language in a given situation. Moreover, most practice theories emphasize the latent connection to material aspects of social reality. That is, specific behaviours or actions are closely linked with or mediated by material resources.

Third, the notion of practice allows one to deal with one of the most fundamental issues in contemporary social analysis: how social action is linked with structure and agency. Although views on the linkage of practice and activity differ, most scholars emphasize the potential of the concept of practice to explain why and how social action sometimes follows and reproduces routines, rules and norms and sometimes does not. For example, Giddens's (1984), Foucault's (1980a) and Bourdieu's (1990) seminal work all focus on 'practice' as a key theoretical concept when dealing with social activity. For Giddens (1984), structuration is the key issue; practices are reproduced and at times transformed in social action, thus reifying social structures. For Foucault (1977; 1980b), the point is that we are all constrained and enabled by discursive practices that include all kinds of social practices in addition to pure discourse. And for Bourdieu (1990; 1994), practices constitute an essential part of all human activity; they are part of a grammar of dispositions (inculcated in *habitus*) that defines what can and will be done in social fields.

Fourth, the practice approach puts emphasis on the knowledgeability of actors. As Rouleau and Cloutier (2022: 729) recently highlighted, taking the practice approach seriously 'means shifting from practices as activities or as empirical observable things to practices viewed as ways and/or "sites of knowing"'. According to Nicolini (2011: 602), 'practice is where knowledgeability manifests itself and agency becomes possible'. Practice has to do with the multiple and distributed ways that the practical knowledge of actors is instantiated in their everyday sayings and doings.

This all may give the impression that there is a meta-theory of social practice that could be applied to areas such as strategy research. The fact remains, however, that a closer look at the various perspectives referred to above reveals fundamental epistemological, theoretical and methodological differences. This multiplicity of perspectives does not, however, have to be seen as an impediment to the development of practice-based approaches, but a richness that can help us to better understand various aspects of social activities and practices in contexts such as SAP.

Overview of SAP Research

SAP research developed from several sources. Classics of strategy process research (Burgelman 1983; Mintzberg, Raisinghani and Théoret 1976; Mintzberg and Waters 1985; Pettigrew 1973) and various attempts to broaden and renew strategic management (Eisenhardt 1989; Gioia and Chittipeddi 1991; Johnson and Huff 1998; Knights and Morgan 1991; Langley 1989; Oakes, Townley and Cooper 1998) can be seen as its intellectual roots. However, despite its many important predecessors, it has only been from the early 2000s that SAP has established itself as a clearly defined subfield in strategy research, bringing together like-minded colleagues whose ideas might otherwise have 'remained marginal and isolated voices in the wilderness' (Johnson et al. 2007: 212). An important enabler in this development has been

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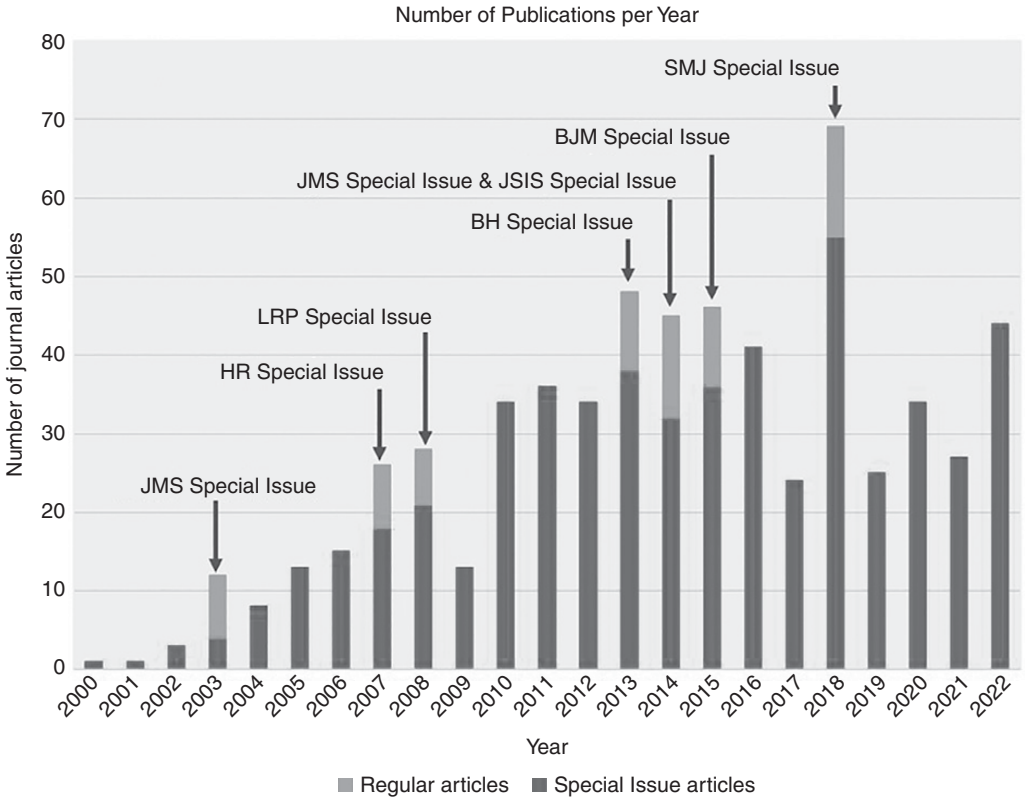


Figure 0.1 Publication of SAP articles since 2000
Source: Extended and updated from Jarzabkowski, Seidl and Balogun (2022: 1535).

the special issue of the *Journal of Management Studies* on 'Micro Strategy and Strategizing' (Johnson, Melin and Whittington 2003), which formally defined the SAP research agenda for the first time. Since then, we have seen an enormous rise in publications taking a SAP perspective. Over the last two decades, there have been more than 500 journal articles in leading journals, eight special issues, several foundational books, at least four comprehensive review papers and numerous book chapters, not to speak of the wealth of conference papers presented every year since (see Figure 0.1 for the development of paper publications since the year 2000). In the following we will provide a short overview of this research stream. We will first focus on the contributions that have aimed at developing the SAP research agenda and then turn to important themes within this area.

Development of the Research Agenda

Important efforts have been made to define and develop the SAP approach per se. This includes analyses that have focused on the *role and characteristics of SAP research in relation to other subfields of strategy and organization studies*. A key paper to do so was Whittington (1996), which positioned SAP with reference to the policy, planning and process approaches as the major perspectives on strategy. Given the affinities of the SAP approach with the process approach it is not surprising that others have elaborated on the similarities and differences between the two (e.g., Burgelman et al. 2018; Chia and MacKay 2007; Floyd et al. 2011; Johnson et al. 2007; Whittington 2007). In addition, there are several works that show how SAP can be understood as a complementary approach to the resource-based

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view in general (Johnson, Melin and Whittington 2003; 2007) and dynamic capabilities in particular (Regnér 2008). More recently, scholars have linked SAP to the attention-based view (Nicolini and Mengis 2023; Ocasio, Laamanen and Vaara 2018) arguing that 'a theoretical practice view complements and enriches the ABV by offering a less voluntarist and top-down view and proposing a richer view of situatedness' (Nicolini and Mengis 2023). Others have advanced the research agenda by linking SAP to domains of organization studies, such as entrepreneurship-as-practice (Jarzabkowski, Seidl and Balogun 2022), routine dynamics (Seidl, Grossmann-Hensel and Jarzabkowski 2021), institutional theory (Suddaby, Seidl and Lê 2013), information systems (Whittington 2014) and business history (Jarzabkowski et al. 2022).

SAP research has included publications that have *offered frameworks for studying SAP*. This includes the seminal paper by Johnson, Melin and Whittington (2003), in which the SAP approach – at that time labelled 'activity-based view of strategy' – was introduced for the first time and characterized as concern 'for the close understanding of the myriad, micro activities that make up strategy and strategizing in practice' (p. 3). This characterization was refined by Whittington (2006), who emphasized that the strategizing activities needed to be understood in their wider social context: actors are not working in isolation but are drawing upon the regular, socially defined *modus operandi* that arise from the plural social institutions to which they belong. Based on this, Whittington proposed the overarching '3P framework' differentiating between 'practitioners' (i.e., those who do the actual work of making, shaping and executing strategy), 'praxis' (i.e., the concrete, situated doing of strategy) and 'practices' (i.e., the routinized types of behaviour drawn upon in the concrete doing of strategy) as the three building blocks that make up strategizing.

This framework was further developed by Jarzabkowski, Balogun and Seidl (2007), who argued that, due to pragmatic reasons, empirical studies would do well to focus on the relation between any two of the building blocks while (temporarily) bracketing out the third. In their review of the SAP literature of the time, they show how all papers can be placed within this framework, identifying particular gaps from which they develop a research agenda for future work. Johnson et al. (2007) proposed another overarching framework that positions different research projects according to the level of analysis (the level of actions, the organizational level and the field level) and according to whether they are concerned with content or process issues. The authors use this framework to examine the strength and distinctiveness of the existing research and propose their own agenda for future work. A literature review and research agenda on the basis of this framework is provided by Jarzabkowski and Spee (2009). Whittington (2007; 2019), in turn, extended the '3P framework' to the '4P framework' by adding 'profession' as an important aspect shaping strategy work. As he explained: 'the 4P model helps make explicit the trans-organizational dimension that is sometimes neglected in earlier Strategy-as-Practice studies . . . Adding the fourth dimension of professional field protects against such insularity: episodes of organizational praxis are typically infused by practices existing at the macro level of Strategy as profession' (Whittington 2019: 31).

There are several useful discussions of various *theoretical perspectives* on SAP research. Jarzabkowski, for example, explored activity theory (Jarzabkowski 2003; 2005), different theories of social practice (Jarzabkowski 2004) and structuration theory in particular (Jarzabkowski 2008). Denis, Langley and Rouleau (2007) compared potential contributions from theories of social practice, convention theory and Actor–Network theory. In Johnson et al. (2007), we find an exploration of situated learning theory, Actor–Network theory, the Carnegie tradition of the sensemaking and routines perspective, and institutional theory. In addition, Chia and Holt (2006) have explored the potential of the Heideggerian perspective, Herepath (2014) Archer's critical realist perspective, Neyland and Whittle (2018) Garfinkel's ethnomethodology, Whittle et al. (2021) Goffman's dramaturgical perspective, Chia and Holt (2023) Nietzsche's perspective of will to power, Campbell-Hunt (2007) complexity theory, Seidl (2007) systemic-discursive theories (such as those by Wittgenstein, Lyotard and Luhmann),

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Fenton and Langley (2011) and Brown and Thompson (2013) the narrative perspective, Ezzamel and Willmott (2010) poststructuralist analysis, and Vaara (2010) critical discourse analysis as fruitful bases for SAP research. Following Hendry and Seidl (2003), Katzberg (2013) has drawn on Luhmann's system theory for theorizing the interconnectedness between different organizational arenas. Balogun et al. (2014) have in turn elaborated on the role of discourse as the central foci of SAP research, and Guérard, Langley and Seidl (2013) have explored the potential of different performativity perspectives such as Austin, Butler, Lyotard and Callon. In a review article, Seidl and Whittington (2014) have provided an overview of different theoretical perspectives in terms of the ways in which they allow linking local strategizing activity to larger social phenomena.

Closely related, there also are several *methodological reflections on SAP*. Balogun, Huff and Johnson (2003) is the first paper to address this issue and to suggest specific methodological approaches. The paper summarizes the methodological challenges of SAP research as follows: 'The growing need of researchers to be close to the phenomena of study, to concentrate on context and detail, and simultaneously to be broad in their scope of study, attending to many parts of the organization, clearly creates conflicts' (p. 198). This issue is also taken up in a separate chapter in Johnson et al. (2007), providing illustrations of various methodological choices and their respective advantages and disadvantages. Rasche and Chia (2009) also deal with methodological challenges in a section of their paper that propagates ethnographic approaches as most suitable for SAP research. Extending on that, Vesa and Vaara (2014) elaborate on new forms of ethnographic approaches in SAP research such as auto-ethnography (allowing for a better understanding of the strategists' lived experiences in different contexts), video-ethnography (allowing for in-depth analysis of strategic practices in their socio-material context), comparative ethnography (allowing for comparisons practices in different contexts) and virtual ethnography (allowing for advancing our understanding of virtual aspects of strategy work). Jarzabkowski, Bednarek and Cabantous (2015) describe the advantages of global team-based forms of ethnography to capture geographically distributed strategic practices and their wider implications. Gylfe et al. (2016) examined the potential of various video methods in studying strategizing work. Vaara and Lamberg (2016) proposed different historical methods, and Venkateswaran and Prabhu (2010) process and clinical studies for advancing our knowledge of the practice of strategy-making. Addressing the challenge of linking micro and macro levels of analysis in strategy research, Kouamé and Langley (2018) compared three different methodological approaches for that. For a broad range of novel ways of interacting with informants, collecting data, involving collaborators and so on, the chapter written by Huff, Neyer and Moslein (2010) in the first edition of this Handbook remains an important methodological piece to consult. Abdallah, Basque and Rouleau (2018) address the methodological conversations of the field and review the research design of SAP empirical papers. They suggest the existence of three research design profiles in SAP research (classical, extended and comprehensive) and bring up some suggestions for renewing how we do SAP research.

However, others have *criticized the predominant definitions and approaches to SAP research*. In particular, Robert Chia and his colleagues have provided alternative perspectives on the analysis of strategy (Chia and Holt 2009; Chia and MacKay 2007; MacKay, Chia and Nair 2021; Rasche and Chia 2009). Rather than building on the proposed frameworks, they criticized current research for its lack of distinctiveness and call for a more focused approach that breaks away from the methodological individualism that still dominates SAP work. In addition, Clegg, Carter and Kornberger (Carter 2013; Carter, Clegg and Kornberger 2008; 2010; Clegg, Carter, Kornberger 2004) have critiqued the conceptual and methodological bases of much of the research in this area. In a nutshell, they argued for more theoretically advanced and critically oriented studies to explore fundamental issues of identity and power. This critique served as a key motivator for the expansion and development of the SAP research agenda in the second and third

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edition of this Handbook with contributions focusing on these issues such as Chapter 24 by Clegg and Kornberger on SAP and power and Chapter 25 by Blom and Alvesson on SAP and critical approaches.

More recently, Jarzabkowski, Kavas and Krull (2021) in an article entitled 'It's practice. But is it strategy?' initiated a discussion on the very notion of strategy. The authors argued that SAP researchers have stifled the potential of the SAP approach by adhering to conventional conceptualizations of what characterizes activities as strategic. Thus to 'reinvigorate' SAP and to unleash its full potential the authors have called for researchers to extend the definition of strategic activities to any activities that can be considered consequential (Kornberger and Vaara 2022). Complementing the article by Jarzabkowski, Kavas and Krull, Rouleau and Cloutier (2022) – in their article entitled 'It's strategy. But is it practice?' – problematized the notion of practice underlying SAP research extending on an earlier article on that topic (Rouleau 2013). The authors propose that to advance SAP research 'strategy-as-practice scholars place a knowledgeability principle at the core of their conceptualization of practice. We believe that taking the notion of practice more seriously in our research in this way will help not only reinvigorate, but also revitalize our field by deepening our understanding of the relationship between practice research and strategic organization' (Rouleau and Cloutier 2022: 722).

Central Themes in SAP Research

SAP research has focused on several themes, including strategy work in different settings, formal strategic practices, sensemaking in strategizing, materiality and tools in strategy work, discursive practices of strategy, roles and identities in strategizing, and power in strategy.

The thrust of existing research has focused on *ways in which strategy work is conducted in specific organizational settings*. In fact, most studies in this area have concentrated on organizational processes, activities and practices in particular contexts. In addition to studying business organizations, such as venture capital firms (King 2008), financial services organizations (Ambrosini, Bowman and Burton-Taylor 2007), airlines (Vaara, Kleymann and Seristö 2004), clothing companies (Rouleau 2005), reinsurance companies (Jarzabkowski, Spee and Smets 2013) or multi-business firms (Jarzabkowski and Balogun 2009; Paroutis and Pettigrew 2007), scholars have examined strategizing in orchestras (Maitlis and Lawrence 2003), artistic organizations (Daigle and Rouleau 2010), hospitals (Denis et al. 2011; von Arx 2008), cities (Kornberger and Clegg 2011; Pälli, Vaara and Sorsa 2009), universities (Jarzabkowski 2003; 2004; 2005; Jarzabkowski and Seidl 2008), as well as crowds and communities (Dobusch and Kapeller 2018). These analyses have also revealed distinctive patterns in strategizing; for example, Regnér (2003) showed that there are significant differences in the way that people at the centre of a firm strategize compared to those who work on the periphery and Hydle (2015) has drawn attention to the way that strategy work is organized temporally and spatially.

Researchers have also focused special attention on *formal strategic practices*. Studies have examined strategy workshops (Bourque and Johnson 2008; Healey et al. 2015; Hendry and Seidl 2003; Hodgkinson et al. 2006; MacIntosh, MacLean and Seidl 2010; Paroutis, Franco and Papadopoulos 2015; Whittington et al. 2006), inter-organizational workshops (Seidl and Werle 2018), strategy meetings (Asmuss and Oshima 2012; Jarzabkowski and Seidl 2008; Wodak, Kwon and Clarke 2011), committees (Hoon 2007), formal teams (Hendry, Kiel and Nicholson 2010; Paroutis and Pettigrew 2007), practices of transparency and inclusion (Hautz, Seidl and Whittington 2017; Splitter, Jarzabkowski and Seidl 2021) and various formal administrative routines (Jarzabkowski 2003; 2005; Jarzabkowski and Wilson 2002). These formal practices play a key role in strategy formation, and for this reason, Whittington and Cailluet (2008) have dedicated an entire special issue of *Long Range Planning* to the exploration of new avenues for research on strategic planning.

A significant part of SAP research to date has been devoted to the study of *sensemaking in strategizing*. In contrast to earlier works on cognitive

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aspects, SAP scholars have been interested in the social dimensions of sensemaking. Accordingly, researchers have focused on the socially negotiated nature of sensemaking (Balogun and Johnson 2004; 2005; Balogun and Rouleau 2017; Rouleau and Balogun 2011), the political contests around the framing of strategic issues (Kaplan 2008), the temporal dimension of sensemaking (Kaplan and Orlikowski 2013), the interaction between individual-level and organizational-level sensemaking (Stensaker and Falkenberg 2007), inter-organizational sensemaking (Seidl and Werle 2018), the influence of the wider societal context on sensemaking activities at the organizational interface (Rouleau 2005; Teulier and Rouleau 2013), the political aspects (Mueller et al. 2013) and the role of emotions in sensemaking (Liu and Maitlis 2014).

Studies on the *discursive aspects of strategy* make up an important part of SAP research, which has also been the theme of an influential special issue in the *Journal of Management Studies* (Balogun et al. 2014). The first paper to address this topic was the seminal paper by Knights and Morgan (1991) that examined the historical emergence of the strategic management discourse, its assumptions and implications on management. Hendry (2000) provides another influential account of strategy as an essentially discursive practice. Based on ethnomethodology and conversation analysis, Samra-Fredericks (2003; 2004; 2005) has focused the rhetorical micro-processes of strategizing and the ways in which conversations impact strategy, and thereafter strategy conversations have been examined from other perspectives, too (Kwon, Clarke and Wodak 2014; Whittle et al. 2014; Wodak, Kwon and Clarke 2011). Coming from a somewhat different perspective, Seidl (2007) points to the differences between different types of strategy discourses and the problematic relations between them. Drawing on critical discourse analysis, authors have examined how discursive practices make up strategy (Vaara, Kleymann and Seristö 2004), how strategy discourse is appropriated and resisted (Laine and Vaara 2007), how discourses may impede or promote participation in strategic decision-making (Mantere and Vaara 2008: Tavella 2021) and how strategy is staged in CEO keynote performances (Wenzel and Koch 2018). Phillips, Sewell and Jaynes (2008) have followed suit to provide an integrative model of the role of discourse in strategic decision-making. Hardy and Thomas (2014) offer an illuminative analysis of how strategy discourses construct objects and subjects, and Mantere and Whittington (2021) examine the role of discourse in the strategists' identity work. Drawing on seminal work on strategy and narratives (Barry and Elmes 1997), SAP researchers have focused on the role of narratives and storytelling in strategy work (Brown and Thompson 2013; Fenton and Langley 2011; Vaara and Pedersen 2014; Vaara and Rantakari 2023). Strategic plans have also received special attention (Cornut, Giroux and Langley 2012; Spee and Jarzabkowski 2011; Vaara, Sorsa and Pälli 2010).

Research around the role of *materiality and tools* in strategizing is another important and growing area of contribution, which has also been the theme of a dedicated special issue of the *British Journal of Management* (Dameron, Lê and LeBaron 2015). In the wake of this research stream, Vuorinen et al. (2018) provide a review of the strategy tools addressed in leading journals over the last quarter of a century. More specifically, Whittington et al. (2006) have focused on physical objects as particular means of communication and Heracleous and Jacobs (2008) have shown how material artefacts are purposefully employed in change interventions in order to stimulate particular sensemaking processes. Some authors have studied the ways in which tools and techniques change according to context (Jarzabkowski and Wilson 2006; Seidl 2007). Others have examined strategy tools as potential boundary objects that can span across different organizational contexts (Spee and Jarzabkowski 2009). Kaplan's (2011) analysis of PowerPoint has elucidated the specific ways in which material objects influence strategy processes. Wright, Paroutis and Blettner (2013) examine how, when and to what effect strategy tools are used in strategy work. Jarzabkowski, Spee and Smets (2013) as well as Werle and Seidl (2015) focus on how knowledge is inscribed in visual artefacts and the way these shape unfolding strategy processes. Jarzabkowski and Kaplan (2015)

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provide a framework for understanding the reciprocal relationship between the agency of actors and the selection, application and outcomes of tools. Moreover, there have been calls to analyse the ways in which strategizing work has changed through the use of technologies such as mobile phones, video conferencing technology, social media, AI and the like (e.g., Molloy and Whittington 2005; Neeley and Leonardi 2018; Seidl and Whittington 2021).

Researchers have also examined the *roles and identities of managers and other organizational members engaged in strategy work*. Accordingly, a great deal of research has been devoted to the strategic role of CEOs (Ma and Seidl 2018; Ma, Seidl and Guérard 2015; Wenzel and Koch 2018) and middle managers (Balogun and Johnson 2004; 2005; Fauré and Rouleau 2011; Mantere 2005; 2008; Rouleau 2005; Rouleau and Balogun 2011; Rouleau, Balogun and Floyd 2015; Sillince and Mueller 2007; Splitter, Jarzabkowski and Seidl 2021; Thomas, Sargent and Hardy 2011; Toegel, Levy and Jonsen 2022). Other actors have received specific attention as well, including Chief Strategy Officers (Knight and Jarzabkowski 2022), consultants (Nordqvist and Melin 2008; Schwarz 2004), employees (Mantere and Vaara 2008; Splitter, Jarzabkowski and Seidl 2021) and regulators (Jarzabkowski, Matthiesen and Van de Ven 2009). In addition, scholars have pointed out the need for research into the strategic roles of strategy teachers and strategy gurus (Hendry 2000; Whittington et al. 2003). Furthermore, Rouleau (2003) has examined the impact of gender on strategizing practice. Beech and Johnson (2005) have in turn showed the recursive relation between a strategist's identity and strategizing activities during a larger change project. In another study, Lounsbury and Crumley (2007) provide a conceptualization of agency that accounts for the way in which practitioners are constrained by wider societal belief systems, providing meaning to their activities and prescribing them specific roles that delimit the scope for performativity. Following Knights and Morgan (1991), others have focused on the social construction of the identity and subjectivity of strategists (Dameron and Torset 2014; Dick and Collings 2014; Laine and Vaara, 2007; Laine et al. 2016; Mantere and Whittington 2021; Splitter, Jarzabkowski and Seidl 2021). These analyses have been closely connected with discourse and power, as explained next.

Ever since the beginning of SAP research, scholars have also been interested in *issues of power*. Knights and Morgan (1991) set out on an analysis of the 'disciplinary force' of strategy as a particular institutional practice. Studies drawing on critical discourse analyses have also focused on the ways in which strategy discourse can be used to legitimate or resist specific ideas and to promote or protect one's own power position (Laine and Vaara 2007; Mantere and Vaara 2008). This has been followed by studies by Ezzamel and Willmott (2008) and McCabe (2010), who examined the power differentials and inequalities in the strategizing processes occurring in a global retailer and manufacturing company and a UK building society, respectively, focusing attention on various modes of resistance. Other studies focus on power as the central issue of strategic processes and practices. Samra-Fredericks (2005), for example, provides a fine-grained study of the everyday interactional constitution of power based on an analysis of the talk within a strategy meeting. Vaara, Sorsa and Pälli (2010) examine the 'force potential' of strategy texts and Knight, Paroutis and Heracleous (2018) the power of PowerPoint. Kornberger and Clegg (2011) in their study of the strategy-making process undertaken by the City of Sydney highlight the power effects resulting from the simultaneous representation of facts and values. They argue that strategy is a socio-political practice aimed at mobilizing people, marshalling political will and legitimizing decisions. Mueller et al. (2013) studied a multinational apparel company highlighting how politics constitutes a central interpretive method through which organizational reality is constructed and strategic decisions are made. Based on a case study of a global telecommunication company, Hardy and Thomas (2014) in turn show how the power effects of discourses are intensified through particular discursive and material practices, leading to the production of objects and subjects that are clearly aligned with the strategy.

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The Sections of the Handbook

This Handbook is structured into five parts addressing different aspects of SAP.

Part I: Ontological and Epistemological Questions

The SAP approach was born from a break with the traditional notion of strategy as a property of organizations. Instead, strategy was to be understood as an activity or practice: strategy is not something that firms *have*, but something that people *do* (Jarzabkowski, Balogun and Seidl 2007; Johnson, Melin and Whittington 2003). If taken seriously, this reconceptualization implies a fundamental ontological shift in several respects. First, the world of strategy is no longer taken to be something stable that can be observed, but constitutes a reality in flux (a dynamic and processual perspective). Second, strategy is no longer regarded as 'located' on the organizational level; instead, it is spread out across several levels from the level of individual actions to the institutional level (multilevel perspective). Third, the world of strategy constitutes a social reality created and recreated in the interactions between various actors inside and outside the organization (open perspective). Accordingly, there are several fundamental epistemological consequences for both researchers and practitioners. So far, however, SAP scholars have focused relatively little attention on epistemological questions. In this sense, the chapters in Part I of this third edition of the Handbook pave the way for a better understanding of these fundamental issues.

In the first chapter of Part I (Chapter 1), Robert Chia and Andreas Rasche elaborate on the challenges of capturing the actual doing of strategy, which requires researchers to adopt a new *building* worldview. Drawing on Heidegger's philosophy, Haridimos Tsoukas then develops a framework that distinguishes between four different types of actions according to the involved form and degree of intentionality. Simon Grand, Widar von Arx and Johannes Rüegg-Stürm, in turn, argue in their chapter (Chapter 3) that practice research needs to be accompanied by constructivist epistemologies and what that entails. Ann Langley addresses a central question in SAP research: How can we build a cumulative body of knowledge when SAP interests tend to favour small intensive samples and fine-grained analysis? In the final chapter of Part I (Chapter 5), Violetta Splitter and David Seidl reflect on the practical relevance of practice-based research on strategy.

Part II: Theoretical Resources: Social Theory

With Kurt Lewin's adage 'nothing is so practical as a good theory' in mind, it is important to focus attention on the theoretical basis of SAP. A 'good' theory allows us to advance knowledge without having to reinvent the wheel. By offering a means to make sense of the very processes, activities and practices that constitute strategy and strategizing, it can also serve practitioners. However, there is no one theory of practice that can provide a basis for all relevant research questions at various levels of analysis, which range from reflections on strategy as a body of knowledge and praxis to studies of the idiosyncrasies of specific strategic and organizational processes in different institutional and cultural contexts. Neither should a unified theory be the objective if we wish to advance the theoretical discussion of practices and their implications. Consequently, SAP research can and must be informed by alternative conceptions of practice and strategy. Various approaches have been offered and applied, the most important of which will be presented and discussed in Parts II and III of this Handbook.

Part II focuses on general social theories. It serves to explain how specific approaches are able to elucidate not only our understanding of concrete strategic decision-making, but also of strategy as a body of knowledge and praxis.

In the first chapter of Part II (Chapter 6), Richard Whittington explains how Giddens's (1984) structuration theory can be applied to SAP research. Carola Wolf and Paula Jarzabkowski then focus on activity theory as an approach for studying SAP. This is followed by Marie-Léandre Gomez, who provides a Bourdieusian perspective on SAP. Saku Mantere draws on Wittgenstein and reflects

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on the role of language games. Florence Allard-Poesi then adopts a Foucauldian view on, and Valérie-Inès de La Ville and Eléonore Mounoud outline a narrative approach to, SAP. This is followed by Christopher Chapman, Wai-Fong Chua and Habib Mahama, who discuss the varieties of points of contact between Actor–Network theory and SAP research. Andrea Whittle and Frank Mueller, in turn, offer a dramaturgical perspective. Davide Nicolini, David Seidl and Violetta Splitter provide yet another very useful theoretical perspective by explaining how Schatzki's work can be used in SAP research. Jean-Pascal Gond, Bernard Leca, Charlotte Cloutier and Alfredo Grattarola introduce the 'Economies of Worth' (EW) perspective to SAP scholars, emphasizing its critical distance from earlier forms of critical sociology and its distinctiveness from the concept of institutional logic. Finally, in their chapter on performativity, Jean-Pascal Gond, Guillaume Carton and Yuval Millo investigate how SAP and the constitution of strategy as a specific body of expert knowledge can learn from each other.

Part III: Theoretical Resources: Management and Organization Theory

In Part III of the Handbook, we are continuing our theoretical exploration and exploitation of useful perspectives to understand SAP. However, in contrast to the chapters in Part II, the focus here is not on general social theories but on management and organization theories. SAP research is characterized by a high degree of theoretical pluralism. Its rapid expansion in the last decade is partly due to the interests for this perspective demonstrated by other areas in management and organization theories. This part proposes ways to advance SAP research by drawing on such theories.

In the first chapter (Chapter 17), Michael Smets, Royston Greenwood, Mike Lounsbury and Deborah Anderson show the potential of institutional theory for SAP. This is followed by David Oliver, who advances the perspective of 'identity work' as a form of strategic practice. Joep Cornelissen and Henri Schildt then discuss the sensemaking perspective and its potential and Martha Feldman the similarities and synergies between the study of routines as dynamic processes and the study of SAP. François Cooren, Nicolas Bencherki, Mathieu Chaput and Consuelo Vásquez develop a communicational approach to strategy and strategy-making in an attempt to foster a dialogue with the SAP literature and its latest explorations around talk and text. Tyson Rallens, Tom Lawrence and Nelson Phillips adopt a social-symbolic perspective on strategy work, and Patrick Regnér examines commonalities and differences, potential relationships and synergies between SAP and other contemporary approaches in strategy research. Next Stewart Clegg and Martin Kornberger focus on one of the most important but still understudied dimensions in SAP: power. In the last chapter of Part III (Chapter 25), Martin Blom and Mats Alvesson then highlight the value of SAP scholars adopting a 'critical eye' on their research.

Part IV: Methodological Resources

Since the inception of the SAP movement, scholars (Balogun, Huff and Johnson 2003) have pointed to its methodological challenges, which require the researcher simultaneously to be close to actual practice while employing a broad range of theoretical and methodological tools. There have been calls for an exploration of methods that allow us to observe and understand the longitudinal and processual dynamics of the practices, routines and actions of the situated actors, to uncover their interdependences and interactions, and also to focus on discourses and their performativity, the disclosure of the 'non-says', of what is implicit or couched in rhetoric. While longitudinal case studies remain the most frequently used research design in SAP, there is a notable trend towards applying and developing other methodologies (Abdallah, Basque and Rouleau 2018). Some of the most promising approaches are presented and discussed in Part IV of this Handbook. As will become clear, the call for 'methodologically innovative' approaches does not necessarily mean that one has to develop entirely new methodologies; it rather suggests that we look at them through

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a 'practice lens' and use innovative ways to approach managers and reconstruct their strategizing activities and roles.

Ann Cunliffe offers in the first chapter of Part IV (Chapter 26) a stimulating reflection on the connection between ethnography and the study of practice. The chapter by Danielle Zandee (Chapter 27) explores everything SAP researchers always wanted to know about action-research methods but were afraid to consider in their own work. Linda Rouleau suggests that biographical research provides a set of narrative methods of inquiry for carrying out in-depth studies of strategizing practices. In the following chapter, Anne Smith, Ace Beorchia and Jaewoo Jung respond to calls for more innovative methods in SAP research by elaborating on the foundations of photographic methods and exploring their relevance. Eero Vaara looks at the discursive aspects of strategy and strategizing from a critical discursive angle, and Mona Ericsson, Leif Melin and Andrew Popp discuss the fruitfulness of historical methods for SAP research. In the final chapter of Part IV (Chapter 32), Tomi Laamanen, Emmanuelle Reuter, Markus Schimmer, Florian Ueberbacher and Xena Welch argue that even though most work in SAP research has been qualitative in nature, there are significant opportunities for studying strategy practices quantitatively.

Part V: Substantive Topic Areas

In the final part of the Handbook, we focus on central substantive topic areas in SAP research. By substantive topic areas, we mean areas that can be viewed as important sub-streams of SAP research. These topic areas show what we have learned about central issues and questions over time, and the chapters in this section offer an overview as well as directions for future research.

Ann Langley and Maria Lusiani focus on the practice of strategic planning, and David Seidl, Stéphane Guérard and Tania Räcker review and synthesize the extant literature on the role of meetings in the context of strategy. Jane Lê and Paul Spee then set an agenda for the growing body of research exploring the role of materiality in strategy research. Pikka-Maaria Laine and Eero Vaara examine participation in SAP research, and this is followed by Leonhard Dobusch, Julia Hautz and Thomas Ortner, who focus on Open Strategy. Next Ethel Brundin and Feng Liu examine the role of emotions, Nina Granqvist and Ari Kuismin focus on temporality, Eric Knight and Matthias Wenzel examine multimodality, and Claus Jacobs and Jane Lê discuss the role of play in strategizing. Pikka-Maaria Laine, Susan Meriläinen, Johanna Moisander and Janne Tienari then focus on a very important but largely neglected topic: gender and feminism in SAP research. Co-authored by Markus Hällgren, Oscar Rantatalo and Ola Lindberg, the final chapter of this Handbook (Chapter 43) examines the interface between research on extreme contexts and SAP research.

Challenges for Future Research: A Research Agenda

This Handbook strives to be future-oriented. Each of the chapters provides innovative ideas to further advance our understanding of SAP. With this in mind, the editors wish to take this opportunity to spell out a renewed agenda for SAP research. First and foremost, we would like to reiterate that it is vital to make sure that these new insights connect with other streams of strategic management. Hence, one of the key challenges for the future is to strengthen, both on theoretical and empirical fronts, its linkages to other important sub-fields in strategy, like the strategy process school, institutional approaches to strategy, the resource-based view and its new applications, Open Strategy, cognition and sensemaking in and around strategy, evolutionary perspectives, learning, and communication in strategic management.

Future research on SAP holds great promise if it can continue to draw from and apply the theories and methodologies of the social sciences in novel ways. It is paramount that this research approach does not reinvent the wheel or develop in a vacuum but is linked with other areas of social science. The goal should be not only to be informed, but also to be able to contribute to other fields. As the chapters of this Handbook demonstrate, research on SAP has a great deal to offer to contemporary social

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research on process, practice, activity, institutions, network, communication and discourse. For example, focused analyses of strategy and strategizing can add to the ways in which Schatzkian and Goffmanian traditions can be applied in addressing crucial issues in contemporary organizations or society at large.

However, it is crucial that SAP research continues the trajectory of theoretical and empirical analysis, aiming at an increasingly better understanding of the activities, processes and practices that characterize organizational strategy and strategizing. The contributions of this Handbook illustrate how much we have learned since this research approach came into being. But many issues still warrant targeted research efforts. They include the following:

Linkage of the macro and micro in strategy. One of the great advantages of the practice approach is that it provides an opportunity to analyse how concrete micro-level activities reflect broader socio-cultural and institutionalized practices. This link has been made visible, for example, in discursive analyses of strategy. Even though we now have new methodological avenues for discussing the connections of institutions and strategy (Kouamé and Langley 2018), many aspects of the social and organizational practices that constitute strategy and strategizing remain unexplored. Whether we call it practice-driven institutionalism (Lounsbury, Anderson and Spee 2021) or argue for a flat ontology perspective (Seidl and Whittington 2014) to build micro-macro connections, there is still a great deal of work to be done to explain how widely held assumptions about appropriate strategizing approaches influence what is actually done in organizations, and how these activities, then, reproduce or at times transform prevailing understandings and practices.

Agency in strategy and strategizing. A key reason for the emergence of practice theories was the need to develop concepts that explain how structure and agency are linked. SAP studies have added to our understanding of the role, identity and subjectivity of the strategists in many ways and yet we still know little about those who are unable to participate in strategic decision-making. Furthermore, there are still few analyses that specify the ways in which organizational actors are at the same time constrained and enabled by prevailing practices. We must go beyond the conventional view in strategic management that assumes that all strategists are omnipotent actors and only managers are strategizing. For instance, the Open Strategy perspective is now helping us to enlarge our perspective on agency. But we can do more than that. In a context where climate change and ecology matters, SAP researchers need to adopt a larger vision of agency that includes materiality and nature (Rouleau 2022). This is a major theoretical question that should be extended towards the importance of values and moral work in strategizing. No doubt theoretical and empirical analyses of agency have a great deal to offer to enrich our understanding.

Connections and cross-pollination between perspectives and communities. As SAP research is entering in the 'propagation phase' (Jarzabkowski, Seidl and Balogun 2022), there is a need to become more reflexive about the field and our research practices. Recent reviews of the field showed that it comprises different streams of research and argue for building more connections between them (Kohtamäki et al. 2021). Moreover, SAP has extended over the years by dialoguing with other streams of research in management and organization studies (e.g., institutional theory, information technology, history, entrepreneurship, accounting, routine dynamics). There is a need to develop new ways of reinforcing these connections and think about the challenge of maintaining coherence in a fragmented field.

Spread of strategy as discourse and praxis to new areas. SAP research is by definition contextual; the focus of the analysis lies in the processes, practices and activities that constitute strategy and strategizing in a given setting. Apart from studies of strategizing in business organizations, it is important and relevant to analyse the spread of strategy as a body of knowledge and praxis to other types of context, in particular public organizations such as government, municipalities, universities, hospitals or kindergartens. As the existing studies show, such settings are often characterized by all kinds of struggles and clashes. This is even truer when we look at the organizations involved or trapped in the strategic management of grand challenges or extreme contexts (Hällgren, Rouleau and de Rond 2018; Howard-

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Grenville 2021). Examining these organizational and inter-organizational contexts from a SAP perspective will help us to better understand the complexities and intricacies of processes and practices when actors are anticipating and organizing in such contexts. At the same time, these contexts provide examples of recontextualization and hybridization of practices, as well as innovations for dealing with global problems and challenges.

Cross-national comparisons and geographic connection of the field. Decision-making and strategizing practices have evolved in distinctive ways in different national contexts. Future research on SAP could zoom in on these differences and examine trends of practice convergence or divergence. Until now, SAP conversations have been particularly intense in Europa and North America. There is a need to find ways of enlarging these conversations with researchers from the Global South. This will allow SAP researchers to connect and explore other forms and modes of strategizing while developing our knowledge of the role of these institutional contexts and global challenges these other parts of the world are experiencing and the practices they draw on to deal with them.

Longitudinal and multimodal research. Not all research has to be longitudinal or multimodal, but a more fine-grained understanding of the processes and practices of strategic decision-making and change would benefit from longer-term and multi-perspectives analyses that elucidate changes in strategy and strategizing. Furthermore, historical analysis and semiotics and communication studies can help us to better understand how practices have evolved as well as the role of innovation and visuality in strategy and strategizing.

Justification, critique and resistance. Conventional research tends to ignore how people justify, critique and resist what is happening during strategic change; these topics are often framed as obstacles to be dealt with and/or as illegitimate behaviour. If we want to better understand the social processes in strategizing, we need to take the issues of justification, critique and resistance seriously. As demonstrated in the contributions of this Handbook, such analysis involves a reconceptualization of the ways in which organizational actors interpret, make sense of, legitimize or delegitimize, or react to strategies that are imposed upon them. The reactions range from various competing worldviews and modes of coping to outright resistance. Future research on SAP would benefit from exploring existing critical analyses of power on this endeavour.

Temporal and spatial dimension of strategizing. As various practice theorists have highlighted, we cannot properly understand human activity without paying attention to its temporal and spatial dimensions. There is some research that has examined how strategy work is organized in time and space (see Hydle 2015; Picard, Durocher and Gendron 2020) but there is a need to take additional steps. In terms of 'objective' time and space, we need to pursue our analyses about where and when strategy work is being carried out. Strategy work is dispersed both across different physical and discursive spaces and taking place at various different points in time. In terms of 'subjective' time and space – or better: temporality and spatiality – we need to increase our understanding of how they are socially constructed in and through our strategizing practices.

Emotions, body and gender in strategy work. Closely related to sensemaking, several calls have been made for taking emotions, body and gender seriously in strategy-making. Recently, it seems that the topics of emotion (Kouamé and Liu 2021; Liu and Maitlis 2014; Vuori, Vuori and Huy 2018) and body (Gylfe et al. 2016; Wenzel and Koch 2018) have emerged as insightful and stimulating dimensions that are transversal to any strategic practices and situations. As 'emotion' is related to a variety of embodied sentiments, feelings and affects embodied, there is a need to develop our understanding of their role in strategic planning and change. Related to cognition and sensemaking, emotions and body can either support or weaken strategic intents and attention. Moreover, they are gendered, culturally and institutionally embedded and linked with power relations. However, gender which intersects with other social categories such as ethnicity, age, class and so on, has been a relatively neglected topic in SAP. While emotions and body appear to be relevant topics to advance our view of strategy-making as a social practice, we now need to also address the gender challenge in strategizing and strategizing processes.

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Shifts in organizing and technology. Notable changes in organizations and advances in information technology, robotics and generative artificial intelligence are currently reshaping the ways strategy is planned and implemented. SAP research has remained relatively silent about the ways in which the various types of information technology, digitalization tools and other communication media affect the processes and practices of strategizing. The use of digital media to communicate and interact constitute a complex mix of external and internal interfaces through which strategy is achieved, contested and resisted. These fundamental features of contemporary organizations and society warrant the attention of SAP researchers in their own right.

SAP research for whom? Finally, SAP research should be accessible to practitioners. Increasingly sophisticated theoretical analysis runs the risk of becoming alienated from the problems and challenges of the practitioners. Researchers should be mindful of this and strive to better understand the world of the practitioner with new epistemological, theoretical and methodological perspectives. For example, future research could challenge the prevailing view that holds that academic knowledge is superior to practical knowledge. Theoretical work could develop concepts and ideas that draw from what is relevant – either useful or problematic – in the practitioners' world. In addition, new research could aim at a reappropriation of methods such as action, collaborative and participative research. Future research could also be more reflexive about the relevance of practice research not only for practitioners but also about the ways in which SAP scholars are teaching and disseminating their research to a broader audience.

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