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Chapter 34
Strategy-as-practice research on middle managers' strategy work

Linda Rouleau, Julia Balogun and Steven W. Floyd

Advancing research on middle managers, strategy and strategic change is particularly important given the fast-changing strategic contexts in which many organizations operate. Unlike top managers, who are recognised as having formal strategic roles, middle managers' strategizing actions are often informal, occurring across many different organizational subunits throughout the strategy process (Balogun and Johnson 2004). Given that they cannot rely exclusively on formal authority, middle managers need to draw on a diverse set of resources and skills to influence the development of the firm's competitive advantage (Lechner, Frankenberger and Floyd 2010; Huy 2011; Rouleau and Balogun 2011). This raises an interesting question: what do middle managers do in their strategy work and how do they do it? This question speaks directly to the research agenda of the strategy-as-practice perspective (Jarzabkowksi, Balogun and Seidl 2007; Vaara and Whittington 2012). By looking at middle managers' strategy work (Whittington 2006) – or, put differently, at their 'practices' or their 'situated' formal and informal strategic activities – strategy-as-practice researchers studying middle managers are opening the black box of their strategic roles (Mantere 2008). They are consequently providing a better understanding of what kinds of resources and skills it takes to enact these roles.

Since the papers written by Balogun and Johnson (2004; 2005) on middle managers and strategic change, strategy-as-practice research on middle managers has burgeoned (see, for example, Besson and Mahieu 2011; Thomas, Sargent and Hardy 2011; Beck and Plowman 2009; Nielsen 2009; Hoon 2007). This chapter reviews this growing body of research and suggests directions for its future development. The review shows existing research to provide important insights into the multiple ways middle managers draw on their skills in doing their strategy work. This chapter argues that there remain five main challenges that should be addressed in order to develop the full potential of SAP research on middle managers. First, there is a need for more theoretical depth in drawing on social practice theories for studying middle managers' strategy work. Second, the methodologies used might be more innovative. Third, the lack of coherence and consistency in describing middle manager practices impedes the development of cumulative middle manager strategy-as-practice research. Fourth, research has failed to examine how middle manager practices are embodied and materially mediated. Fifth, middle manager SAP researchers have not put sufficient emphasis on developing critical reflection and discussing the practical relevance of their findings.

The chapter is organized as follows. We start by discussing why it is important to better understand middle managers' strategy work. We then review the existing research on middle managers, strategy and strategic change from a strategy-as-practice perspective. To date, four theoretical lenses have been used by SAP researchers: sensemaking, discursive, political and institutional. Finally, we discuss the five main challenges for middle manager strategy-as-practice research and suggest ways that future research could begin to meet such challenges.

Why study middle managers in strategy as practice?

Middle managers have not always been seen to be as significant strategically as they are now. During the 1980s middle managers became the target of many critics. In a context of delayering and downsizing, many researchers were even predicting the death of middle managers (Pinsonneault and Kraemer 1997; Dopson and Stuart 1990; 1992). Nevertheless, extensive research (such as Dutton *et al*. 2001; Floyd and Wooldridge 1992; 1994; 1997) about this period has shown that, even in the traditional hierarchical and bureaucratic organizations common in the 1980s, the importance of the middle manager role was underestimated. Such research was already showing that, in fact, middle managers were a strategic asset, important for their ability to synthesize information and champion strategic ideas, as well as facilitating adaptability and implementing change.

Far from disappearing, middle managers are more present than ever. While the flattening of hierarchies in the 1980s may have reduced the numbers of middle managers, other changes have subsequently increased them. In the more global organizations of today, in which technology and ease of travel have changed spans of control and levels of autonomy, more senior managers are drawn into the middle manager net, becoming middle managers of the corporation rather than autonomous country-based subsidiary managers. Furthermore, there is no longer an archetypal middle manager profile, as there was for the role of middle managers in traditional bureaucratic organizations. As Wooldridge, Schmid and Floyd (2008) suggest, they now form a heterogeneous group that includes, beside the middle manager as a hierarchical position, general line managers (for example, divisional or business unit managers), functional line managers (such as a vice president of marketing) and even project-based managers. Therefore, their roles and functions in strategic change have been largely transformed. The strategy-as-practice perspective provides a way of exploring how middle managers are evolving as a professional group along with the evolution of their organizations.

There are many reasons for focusing more attention on the strategic role middle managers play in contemporary organizations. In contemporary organizations middle managers *face a complex set of new issues*, while they are often asked to do more *with less resource* (Balogun 2007; Hassard and McCann 2004). Since organizations are becoming ever more customer-oriented, *middle managers have to*

find in their day-to-day activities different ways to accommodate the organizational logic of control with the operational flexibility needed in such contexts (Sharma and Good 2013; Bryant and Stensaker 2011; Fauré and Rouleau 2011; Ling, Floyd and Baldridge 2005). Not only are they acting as linking pins between top and lower management but, in decentralized and networked organizations, they are also frequently interacting with colleagues from other departments and divisions, and even from other organizations (Rouleau and Balogun 2011; Neilsen 2009; Laine and Vaara 2007; Frow, Marginson and Ogden 2005).

While there are many small and medium-sized enterprises, there remain many large organizations that in comparison to their predecessors are flatter, more team-based and more international with greater diversity, changing spans of control and creating a need for management of geographically distant and dispersed teams and team members. Moreover, organizations are becoming pluralistic (Denis, Langley and Rouleau 2007) and their frontiers seem to be more permeable than before (Balogun *et al*. 2005). Therefore, exploring the work of boundary-spanning middle managers resonates with the call of Vaara and Whittington (2012) for a better understanding of how practitioners are acting through an interlocked web of practices that can be micro- or macro-organizational and even institutional (Frow, Marginson and Ogden 2005; Sharma and Good 2013; Teulier and Rouleau 2013).

The invasion of new communication technologies – such as e-mails, cellphones and the internet – also impacts on how middle managers interact with their superiors, peers and subordinates within and outside the organization. Nowadays middle managers interact with virtual teams scattered around the globe, and they also deal with a huge amount of information available on the internet for promoting their projects and retaining the attention of their superiors. Communication technologies transform the ways middle managers play their role in complex organizations. Instant messaging, electronic monitoring and filtering tend to complement and/or even sometimes displace the usefulness of informal face-to-face conversation around the coffee machine. All these technical changes are impacting on the way middle managers accomplish their strategic role in organizational settings. The multiple ways through which practitioners are communicating in different contexts are of major importance in SAP research (Bryant and Stensaker 2011; Wooldridge, Schmid and Floyd 2008; Rouleau and Balogun 2011). Since strategy as practice is concerned with the sociomateriality of strategy-making (Jarratt and Stiles 2010; Jarzabkowski, Spee and Smets 2013; Spee and Jarzabkowski 2009), studying middle managers is of great interest, as they are pivotal to the activation of the organizational strategic infrastructure.

Furthermore, middle managers' lack of formal power in comparison to senior managers brings to the surface skills that all strategic players need but are less obvious in those with formal power. Thus, studying them teaches us something about strategic work that is not so obvious (though undoubtedly still needed) in others. As strategy-as-practice research is interested in looking at the skills and activities of practitioners (Jarzabkowski, Balogun and Seidl 2007), research on

middle managers is essential for better understanding the social construction of the organizational world. In their daily activities, middle managers have to meet conflicting demands and respond to contradictory logics (Bryant and Stensaker 2011; Lüscher and Lewis 2008). To resolve different organizational and managerial paradoxes, they are developing more or less intentionally discursive and political strategies and tactics that need to be highlighted (Balogun *et al.* 2005; Hope 2010). Consequently, studying middle managers in SAP research appears to be a way to highlight the essence of managerial work in complex organizations.

As part of the developing strategy-as-practice research agenda, it is also necessary to understand more about the nature of middle manager agency, since current research ignores what enables or constrains middle managers from fulfilling role expectations. Mantere (2008) identifies particular enablers of middle management agency, but also finds that, for middle manager agency to take place, reciprocal actions by top management is needed for the fulfilment of roles. Similarly, Mantere and Vaara (2008) reveal that certain discourses impede or promote participation in strategy work by middle managers. Again, as organizations change, and the nature of middle managers and their relationships with others – particularly senior managers – also changes, then what impedes or promotes their agency and participation may also change. Strategy as practice is a particularly beneficial lens for such research, since it encourages a focus on both agency and structure, by considering not just the strategic work of strategy practitioners but also the practices guiding and fuelling this activity (Mantere 2005).

To sum up, given that middle managers play a central role in the strategy-making process, SAP research is interested in the multiple ways in which middle managers enact their roles, and how they accomplish them on a daily basis. Put differently, those researching middle managers and strategy as practice are interested in opening the black box of middle manager strategic roles in order to look at their 'practices' or their 'situated' formal and informal strategic activities, accomplished through their daily tasks in different contexts and at different levels of the organization. This is why in this chapter we talk in terms of middle managers' strategy work (Whittington 2006) instead of middle managers' strategic role. We next review the research to date on strategy-as-practice middle manager research, to see how this research has until now answered these questions and what contributions it has provided since the beginning of the 2000s.

Researching middle managers through four lenses

Middle managers' strategy work is complex and requires them to draw on numerous relational skills as they seek to maintain their pivotal or boundary role between departments, divisions and even organizations. To study what middle managers do when they are strategizing, strategy-as-practice researchers have until now used four theoretical lens: the sensemaking lens (Table 34.1), the discursive lens (Table 34.2), the political lens (Table 34.3) and the institutional lens (Table

34.4). We use these lenses to synthesize the SAP middle manager research in this review.

Table 34.1 Strategy-as-practice research on middle managers: a sensemaking lens

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
Balogun (2003)	Sensemaking and change (a range of activities for interpreting the strategic change intent)	Diaries, interviews, focus group – longitudinal case study (organizational restructuring)	Middle managers in a hierarchical position (lateral and downward)	Undertaking personal change Keeping the business going Helping others through change Implementing change through departments
Balogun and Johnson (2004)	Sensemaking and change (process through which people create and maintain an intersubjective world)	Diaries, interviews, focus group – longitudinal case study (organizational restructuring)	Middle managers in a hierarchical position (lateral interactions)	Sensemaking schema development (moving from 'shared' to 'clustered' and finally 'recomposed' sensemaking)
Balogun and Johnson (2005)	Sensemaking and change (process referring to the level of intersubjective face-to-face conversations and interactions)	Diaries, interviews, focus group – longitudinal case study (organizational restructuring)	Middle managers in a hierarchical position (lateral interactions)	Middle managers' sensemaking processes leads to both intended and unintended change outcomes (two levels of sensemaking)
Rouleau (2005)	Sensemaking and knowledge (a set of micro-practices anchored in implicit and contextual knowledge)	Organizational ethnography, interviews – longitudinal case study (strategic reorientation)	Selling directors (organizational boundary, customers)	Translating the orientation Over-coding the strategy Disciplining the client Justifying the change

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
Ling, Floyd and Baldridge (2005)	Issue-selling and cultural embeddedness (directing top managers' attention to issues and helping them to understand these issues)	Extensive literature review	Local subsidiary managers (upward relations with multinational managers)	Issue-selling practices are embedded in national cultures (16 propositions are elaborated)
Lüscher and Lewis (2008)	Sensemaking, change and paradox (efforts to interpret and create coherence)	Action research (organizational restructuring)	Production managers (downward to employees)	Paradox of performing, belonging and organizing
Beck and Plowman (2009)	Sensemaking and unusual events (assigning meanings to events collectively)	Extensive literature review (referring to the space shuttle Columbia disaster)	Middle managers in a hierarchical position (multi-level and multi-stage)	Encourage divergence in interpretations during early stages of the change and blend and synthesize the divergent interpretations during later stages
Smith, Plowman and Duchon (2010)	Sensegiving and values (everyday effort to influence and shape the meaning constructions of others)	In-depth interviews and on-site visits of 11 manufacturing companies (strategic continuity)	Successful plants managers (downward with employees)	Valuing people Valuing openness Valuing being positive Valuing being part of a larger community
Rouleau and Balogun (2011)	Strategic sensemaking (an ability to craft and share a	In-depth interviews (organizational restructuring)	A production manager and a coordinator	Performing conversation Setting the scene

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
	message in order to influence others)	and focus groups (organizational change)	(upward and downwards) A functional line manager and a project manager (lateral and upward interactions)	

Table 34.2 Strategy-as-practice research on middle managers: a discursive lens

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
Hoon (2007)	Strategic conversations (discussions on strategic issues and informal interactions around committees)	Management meetings, interviews and documents – longitudinal case study (radical change)	Middle managers in a hierarchical position (upward and downward)	Generating an understanding of the issue Aligning towards an issue Making pre-arrangements
Nielsen (2009)	'Talk-in-interaction' (possibility for creating a context for the employees to manoeuvre in)	Department meetings in 5 firms (15 meetings recorded and others); 6 excerpts are analysed (organizational change)	Department heads (downward)	Labelling Categorizing Introducing new words Making conversational repairs
Davis, Allen and Dibrell (2012)	Strategy messages (means for transmitting ideas about the organizational	Questionnaire to top, middle and boundary personnel (change in customer services)	Middle managers in a hierarchical position (multi-level)	The influence middle managers exercise on boundary personnel's strategic

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
	position in the market place)			awareness depends on the clarity of their messages
Besson and Mahieu (2011)	Strategic dialogue (managers' discussions in situations of exploration) and controversies (discursive processes related to competing views of change)	Action research – longitudinal case study (radical change)	Middle managers responsible for operational units (in interaction in committee with top managers)	Becoming a strategist entails the construction of new systems of roles and identities, along with development of appropriate dialogue modes Developing a new strategy necessitates transformating the organization's social fabric
Thomas, Sargent and Hardy (2011)	Dialogue (communicative interactions in which meanings are debated, contested and/or agreed upon by participants)	Workshop observation, interviews and documents – longitudinal case study (organizational restructuring)	Middle managers in a hierarchical position (in interaction in committee with top managers)	A set of 13 communicative practices (inviting, affirming, clarifying and so on) from which two coexisting dialogue patterns deduced: a generative and a degenerative pattern
Fauré and Rouleau (2011)	Conversations (strategic competence referring to the knowledge of	Conversation analysis of 3 budgeting conversations –	Middle managers and accountants (lateral interactions)	Invoking the usefulness of numbers to activate local projects

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
	the strategy drawn in daily activities)	longitudinal field study (introduction of a partnership strategy)		Constructing the acceptability of numbers to report them to external partners Authorizing the plausibility of numbers to reconcile local contingencies and global coherence

Table 34.3 Strategy-as-practice research on middle managers: a political lens

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
Balogun *et al*. (2005)	Power is relational, and knowledgeable agents are constituted by networks as well as they mobilize resources, processes and meaning for acting upon them	Diaries, focus groups, interviews (organizational change)	Change agents (intra-organizational boundary and multi-level)	Adjusting management systems Aligning agendas selling Engaging in stage management Gathering intelligence Managing up
Laine and Vaara (2007)	Power as discursive struggle over subjectivity	Participant observation, interviews, documents – longitudinal case study (strategic development)	Middle managers in a hierarchical position (upward and lateral influence)	Middle managers resist discursive hegemony by initiating a strategic discourse of their own (an

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
				entrepreneurial discourse) to create room for manoeuvring in controversial situations
Smith *et al*. (2009)	Political skill as interpersonal style combining social astuteness, ability to relate well, network ability and apparent sincerity	In-depth interviews and on-site visits of 11 manufacturing companies (strategic continuity)	Successful plant managers (downward with employees)	Effective plant managers use their political skills and the unobtrusive and systemic power to achieve both affective and substantive outcomes
McCabe (2010)	Power and resistance relations; power exercised is ambiguous and contradictory in that it both supports and disrupts managerial purposes	Interviews and documents – longitudinal case study in financial services (re-engineering and customer service change)	Middle managers in a hierarchical position (upward resistance)	The ambiguities, contradictions and uncertainties involved in strategizing illuminate the possibility of interrogating and challenging claims to power; ambiguity also has the potential to amplify conflict and resistance
Vickers and Fox (2010)	Power as an attribute of networks, not centrally diffused but arising in interactions (enrolment and	Self-ethnography – longitudinal case study (post-acquisition strategy)	Human resource managers (lateral and multi-level interactions)	The unofficial network of middle managers effectively changed the top management strategy for the

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
	counter-enrolment through unofficial networks)			benefit of the organization
Hope (2010)	Power as resource, process and the management of meaning in creating a perception of legitimacy	Diaries and interviews – longitudinal case study (organizational change)	Heads of sections and department heads (downward relations)	Disobeying management Handpicking loyal and skilled personnel Taking control over staffing project Placing trusted man in strategic position Taking control over the information Developing a memo for justifying reasons and positions Manipulating the flow of information Etc.
Bryant and Stensaker (2011)	Exploration of the negotiation processes through which middle managers manage competing roles	Theoretical paper (literature review on middle managers' competing roles and presentation of theory of negotiated order)	Hierarchical middle managers(multi directional)	Using negotiated order theory for studying middle managers involves an understanding of the negotiation contexts in which middle managers are engaged and an

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers (relations with others)	Processes, practices and skills
				understanding of their negotiations at three levels : new ways of working, negotiation within the self and negotiation of boundaries

Table 34.4 Strategy-as-practice research on middle managers: an institutional lens

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers(type of relations with others)	Processes, practices and skills
Kellog (2009)	Institutional change and social movement literatures	Observation, interviews, documents – 2 longitudinal case studies (change under a new regulation)	Middle manager surgeons (mutual influence)	In one hospital, 'relational spaces' enabled middle manager reformers and their subordinates to change the daily practice targeted by the new regulation, but not in the other
Bjerregaard (2011)	Institutional theory and Bourdieu	Interviews and participant observation – 2 longitudinal case studies (introduction of a new public management strategy)	Middle managers in a hierarchical position (downward and lateral relations)	Differential institutional orders are maintained by middle managers and front-line staff despite exposure to the same demands

	Theoretical definitions and influences	Methods (type of strategic change)	Types of middle managers(type of relations with others)	Processes, practices and skills
Sharma and Good (2013)	Institutional work, institutional logics and sensemaking	A conceptual paper for explaining how middle managers managed the tensions between social and profit logics	Middle managers in a hierarchical position (relations with external stakeholders)	Reflexivity, sensemaking and sensegiving based on middle managers' capacities for integrative, emotional and behavioural complexity
Teulier and Rouleau (2013)	Scandinavian institutional school of translation and sensemaking	Video-ethnography, interviews and documents – longitudinal case study (the introduction of a 3D software platform)	Technical directors (external sectoral stakeholders and software publishers)	Four 'translation spaces' and a set of editing practices (framing problems, staging the collaboration, adjusting their vision, materializing the change, selling the change, speaking for the technology, stabilizing meanings and taking absent stakeholders into account)

The sensemaking lens

Following the foundational work of Floyd and Wooldrige (1997), as well as that of Dutton and her colleagues (2001), much strategy-as-practice middle manager research has adopted a sensemaking perpsective. This research draws on a Weickian view of sensemaking and explores how middle managers contribute to sensemaking in and of strategic change in two different ways (Table 34.1). The first group of studies explores processes of sensemaking accompanying strategic change, and examines how middle managers contribute to the recreation of order and the

stabilization of equivocal views of strategic change over time (Balogun and Johnson 2004; 2005; Beck and Plowman 2009). The second group of studies explores sensemaking as a set of activities (Balogun 2003; Ling, Floyd and Baldridge 2005), micro-practices (Rouleau 2005) and skills and efforts (Rouleau and Balogun 2011; Lüscher and Lewis 2008; Smith, Plowman and Duchon 2010). These studies seek to explain how middle managers contribute to the creation of a collective sense of shared meanings and interpretations through a focus on what they do in terms of activities and practices. While the authors generally do not make any formal distinction between sensemaking and sensegiving, some studies are nevertheless more concerned than others as to the ways middle managers give sense and influence others (Ling, Floyd and Baldridge 2005; Rouleau 2005; Smith *et al*. 2009; Rouleau and Balogun 2011).

Several of these studies combine sensemaking with literature on organizational change (Balogun 2003; Balogun and Johnson 2004; 2005; Lüscher and Lewis 2008). This is because of the fact that middle managers were studied in a context mainly related to significant restructuring projects. Except for two papers presenting a set of propositions and arguments based on extensive literature reviews (Beck and Plowman 2009; Ling, Floyd and Baldridge 2005), only the study done by Smith *et al*. (2009) has been conducted in a context of strategic continuity. Most of the empirical papers were drawn from longitudinal studies using narrative methods such as interviews, diaries and focus groups. Surprisingly, only two studies are based on organizational ethnography and action research (Rouleau 2005; Lüscher and Lewis 2008). Even though the middle managers studied under the sensemaking lens seem to be traditional middle managers as defined by their hierarchical position in large organizations, they nevertheless point to the importance of middle manager lateral and multi-level relations when they are making sense of change, rather than exclusively focusing on their upward and downward relationships during the change.

In terms of research outcomes, the strategy-as-practice research on middle managers and sensemaking has highlighted patterns in the process by which middle managers make sense of a change. For example, Balogun and Johnson (2004) identify a sensemaking development process that goes from 'shared' (before the change) to 'fractured and clustered' (during the change) and finally ends up as 'recomposed' (after the change) sensemaking. More recently, Beck and Plowman (2009) have shown how middle managers encourage divergence in interpretations across hierarchical levels during the early stages of a strategic change yet, during the later stages, tend to blend and synthesize divergent interpretations.

Research that explores the activities, micro-practices and skills of middle managers in interpreting and diffusing strategic change provides empirical findings related to what Rouleau (2005) calls the 'third-order explanation of sensemaking' in three ways. First, sensemaking is locally and culturally embedded, drawing on tacit knowledge (Ling, Floyd and Baldrige 2005; Rouleau 2005). Second, middle managers' strategic sensemaking depends on their capacity to deal with paradoxical

demands related to their organizational position and that of others as well as the tasks that they need to accomplish during strategic change (Balogun 2003; Lüscher and Lewis 2008). Third, strategic sensemaking is related to the performance of discursive skills by middle managers in the course of their action (Rouleau and Balogun 2011, Smith, Plowman and Duchon 2010).

By focusing on middle managers' interactions with others, this body of research from a sensemaking perspective has indubitably provided us with a deeper understanding of the strategizing activities, practices and skills of middle managers. Nevertheless, this research presents a rather neutral view of sensemaking (Mills, Thurlow and Mills 2010), underestimating issues of power and knowledge at play as middle managers, in and through their relations with others, try to make sense of change in their organizations. Moreover, research interested in the concrete set of activities and abilities through which middle managers make sense of change provides us with empirical findings that seem to be quite specific and diverse from one study to another.

The discursive lens

The discursive perspective is rooted in Westley's (1990) seminal paper, from a quarter of a century ago, on middle managers' strategic conversations. Strategy-as-practice researchers who have adopted a discursive lens (Table 34.2) are interested in the discrete talk and communicative actions of middle managers in meetings and conversations to do with strategy development and change (Hoon 2007; Nielsen 2009; Davis, Allen and Dibrell 2012; Besson and Mahieu 2011; Thomas, Sargent and Hardy 2011; Fauré and Rouleau 2011). These studies draw on diverse discursive metaphors, such as conversations (Hoon 2007; Nielsen 2009; Fauré and Rouleau 2011), messages (Davis, Allen and Dibrell 2012) and dialogue (Besson and Mahieu 2011; Thomas, Sargent and Hardy 2011), for describing the middle managers' communication-based interactions. Conversations, messages and dialogue are seen as strategic in the sense that middle managers draw on these communicative practices to achieve their goals through discussions with others.

Most of the strategy-as-practice research on middle managers using a discursive lens has been conducted through longitudinal studies of organizational and strategic change. For example, Hoon (2007) and Besson and Mahieu (2011) have targeted the meetings-based interactions between top and middle managers in order to show the importance of formal and informal interactions for reframing the strategy and building new identities. While these studies are mainly presented in the form of case studies, in two other studies one can also find variants of conversation analysis using a small number of excerpts in order to depict specific communicative practices (Nielsen 2009; Fauré and Rouleau 2011). These fine-grained conversation analyses allow the researchers to show how, through conversations, middle managers do strategic leadership and reframe understandings of their roles and those of others. Contrary to SAP studies on middle managers' sensemaking that mainly focus on traditional middle managers engaged in downward and lateral

relations, research adopting a discursive lens has a strong interest in exploring the verbal negotiations between middle managers and their superiors during particular strategy episodes, such as meetings related to change.

The strategy-as-practice research on middle managers adopting the discursive lens describes a diverse set of communicative practices that seem to be central to the accomplishment of middle managers' strategy work. Even though the studies show a high level of variation, the communicative practices identified reveal the importance in middle managers' strategy work of choosing words and negotiating them (Nielsen 2009; Besson and Mahieu 2011; Hoon 2007). The choice of words is part of the set of middle managers' relational skills, however, and is not entirely intentional (Fauré and Rouleau 2011). Rather than being simply sold or transmitted, the communicative practices of middle managers are debated and contested as much by top managers and subordinates in the course of verbal exchanges. According to Thomas, Sargent and Hardy (2011), this process may or may not be generative for accomplishing strategic change.

Overall, these studies adopting a discursive lens seem to be poorly anchored in language or other practice theory. Most of them offer a rather objectivist view of language and communication. The notions of conversation, message and dialogue are often used with managerial categories – for example, time or agenda of dialogue, sources and efficacy of messages, budgeting conversations – rather than being constructed and used as a specific perspective on communication and language. In this regard, the studies by Thomas, Sargent and Hardy (2011) and Fauré and Rouleau (2011) are exceptions. They adopt, respectively, a Foucauldian and a Giddensian view of communication, but they both deal with it as a resisting and competent practice.

The political lens

Middle manager research has identified the importance of their political behaviours (see, for example, Burgelman 1983; Floyd and Wooldridge 1997) to the evolution of strategy. Middle managers do not have the formal authority to impose their views, as is the case for top managers. Therefore, they constantly have to influence others and negotiate with them in their strategy work (Table 34.3). Strategy-as-practice research on middle managers adopts two broad views on power: the relational and the control-resistance perspectives. In the relational view of power, middle managers are considered as autonomous or knowledgeable subjects, able to mobilize resources, processes and meanings on the basis of the room for manoeuvre provided by the context in which they interact (Balogun *et al.* 2005; Smith *et al.* 2009; Hope 2010; Bryant and Stensaker 2011). In the control-resistance view of power, middle managers achieve their goals and fulfil their interests less by using the available resources and meanings related to their hierarchical positions and more by formally or informally resisting the official discourse of strategic change (Laine and Vaara 2007; McCabe 2010; Vickers and Fox 2010).

Hope (2010) explores how middle managers in an insurance company seek to influence strategic change outcomes through the political management of meanings. Adopting a negotiated order approach, Bryant and Stensaker (2011) look at how middle managers navigate between competing roles on a day-to-day basis, and propose a framework for better understanding how they negotiate these roles in their work, within the self and when intervening at the multiple organizational boundaries. Balogun *et al*. (2005) show how middle managers exercise their power as boundary-shakers in the networks they belong to. Vickers and Fox (2010) provide a fine-grained analysis of the resistance, enrolment and counter-enrolment practices of an unofficial network of managers, who used a formal human resource management programme to resist the official strategy of the firm. The critical approach taken by Laine and Vaara (2007) highlights how middle managers and organizational members effectively resisted new top-down strategy, subjectively distancing themselves by drawing on competing discourses. McCabe (2010) shows that power is exercised in contradictory ways that support middle managers' initiatives and, at the same time, create possibilities for resistance.

To explore the political side of middle managers' work, strategy-as-practice researchers have until now drawn on a variety of theoretical definitions of power and politics, ranging from negotiated order (Smith *et al*. 2009; Hope 2010; Bryant and Stensaker 2011) to network (Balogun *et al*. 2005; Vickers and Fox 2010) and critical theories (Laine and Vaara 2007; McCabe 2010). Not surprisingly, the SAP research on middle managers from a political perspective draws on similar methodologies used by researchers associated with the sensemaking and the discursive lenses. The collection of interview data in longitudinal studies of change remains the standard. Strategy-as-practice research on middle managers adopting a political lens studies middle managers occupying heterogeneous positions in organizations for whom lateral and multi-levels relations are central.

In terms of outcomes, the SAP research on middle managers under the political lens provides us with an understanding of a set of political activities (Balogun *et al*. 2005; Hope 2010), skills (Smith *et al*. 2009) and resistance practices (Laine and Vaara 2007; Vickers and Fox 2010; McCabe 2010). These studies show how middle managers are active movers, and even shakers, of networks. We now know that their power depends on their interpersonal skills and their capacity to negotiate their competing roles during the strategic change. The main outcome is related to the rehabilitation of middle managers' resistance, however. Contrary to the general belief that middle managers are resistant to change, the research on middle managers and strategy as practice adopting a political lens shows us that their resistance might also have positive organizational effects.

Overall, the research still largely takes a managerial view of strategy and power, as if these are essentially the prerogative of senior management, thus leaving hidden how inequality and discrimination are perpetuated through the dominant strategic discourse. Even in the two critical papers in our sample (Laine and Vaara 2007; McCabe 2010), power as domination and discipline is not the pillar of the analysis. It

is important to note that these critical papers are not explicitly designed as middle management research. In these studies, middle managers represent only an organizational group with divergent interests, instead of being studied under a middle manager perspective.

The institutional lens

Nowadays middle managers increasingly have to be involved in inter-organizational collaboration with various stakeholders in order to position their organization in a fast-changing environment (Teulier and Rouleau 2013). In so doing, they contribute to change in their institutional environment – or, put differently, we can also say that they are doing some kind of institutional work (Lawrence and Suddaby 2006). The classic study in strategic management by Daniels, Johnson and de Chernatony (2002), about institutional influences on senior and middle managers' mental models of competition, was in some ways a precursor to the middle manager research from the institutional lens (Table 34.4). Research on middle managers' institutional practices follows the recent calls to build bridges between institutional theory and strategy-as-practice research (Vaara and Whittington 2012; Suddaby, Seidl and Lê 2013).

To our knowledge, there are to date only four strategy-as-practice studies on middle managers under this lens (Kellog 2009; Bjerregaard 2011; Sharma and Good 2013; Teulier and Rouleau 2013), and so the review of these studies is by necessity briefer than the others. While the first two studies examine the role of middle managers in implementing institutional change in two health care organizations, the other two were conducted in the private sector and look at the relationships between middle managers and their external stakeholders. At the organizational level, the existence of relational spaces in which middle managers construct new identities with others (Kellog 2009) and their previous experiences with the institutional logics embodied in habitus (Bjerregaard 2011) explain why some organizations are more successful in implementing institutional change at the organizational level. At the inter-organizational level, it is either by maintaining the hybridity between the profit and social institutional logics during the implementation of corporate social initiatives (Sharma and Good 2013) or by strategically using sets of editing practices that are specific to the different 'translation spaces' in which they are involved that middle managers make sense of the institutional change (Teulier and Rouleau 2013).

Besides institutional theory influences, these studies draw on social movement theory (Kellog 2009), Bourdieu (Bjerregaard 2011) and sensemaking (Sharma and Good 2013; Teulier and Rouleau 2013). Again, longitudinal cases studies based on observation, interviews and documents are the main methods used, though Teulier and Rouleau (2013) innovate in drawing on video-ethnography data. While the papers by Bjerregaard (2011) and Sharma and Good (2013) look at traditional middle managers in hierarchical positions, the two others propose a larger view of middle managers having higher status and more resource access (Kellog 2009;

Teulier and Rouleau 2013). For most of them, however, middle managers interact with others in a multidirectional way.

Research within the institutional lens draws attention to the broader contexts in which middle managers are intervening, rather than focusing analysis on their managerial actions and interactions, as we have seen in papers belonging to the other lenses. Therefore, institutional studies present a richer view of middle manager organizational activities and practices. Not only are middle managers playing their managerial role, they also have to act in different kinds of interactive 'spaces', in which their capacities and competences are strategic for answering the institutional demands of their environment.

Given the small number of strategy-as-practice studies on middle managers that use an institutional lens, it is difficult to criticize their content. Their main challenges remain the theoretical difficulties of linking the macro and the micro levels of analysis when looking at what middle managers do in practice. Supportive theory and clear definitions of institutional work will certainly be needed for advancing research on middle managers under the institutional lens.

Challenges and a future agenda

Without any doubt, strategy-as-practice research on middle managers now constitutes a lively and burgeoning sub-stream on which we can build cumulatively. At first glance, this review reveals the importance of the sensemaking lens, even though other theoretically informed approaches have been added over time. It also confirms the fact that middle managers constitute a heterogeneous group, formed not only by managers in traditionally placed hierarchical roles but also by managers in more diverse, mediating positions. This transformation of middle managers' organizational positions invites us to pay specific attention to their boundary practices, and specifically when interacting with external stakeholders. Moreover, this review indicates that we still know little about how middle managers deal with paradoxes and their competing roles in fast-changing environments. There is at least one study in each of our four lenses above that explores this, but more needs to be done (Lüscher and Lewis 2008; Mc Cabe 2010; Thomas, Sargent and Hardy 2011; Bryant and Stensaker 2011; Sharma and Good 2013).

Nevertheless, five challenges facing SAP middle manager research fall out of this review. First, our review shows that there is little research on strategy as practice and middle managers that explicitly adopts a practice theory approach, and, as a result, many of the studies take a managerialist approach to the study of the strategic work of middle managers. Second, the review shows that the methodologies used could be more innovative, using alternatives to longitudinal case studies and interviews. Third, there is a lack of coherence and consistency in describing middle manager strategic practices, preventing the drawing together of research to develop a cumulative perspective. Fourth, research to date has under-examined how the practices described are materially mediated and embodied, even

though they have to deal with new technological ways of communicating and interacting with others. Fifth, middle manager strategy-as-practice research has not put sufficient emphasis on developing a critical reflection and discussing the practical relevance of the findings.

Taking a social practice approach

In line with the practice turn (Schatzki 2011), strategy as practice involves a recognition that the practice of strategy occurs in a broader context (Balogun *et al.* 2014). Strategizing comprises those 'actions, interactions and negotiations of multiple actors and the *situated practices* that they draw upon in accomplishing that activity' (Jarzabkowski, Balogun and Seidl 2007: 8, emphasis added). As argued above, however, existing research on middle managers' strategic work and roles still largely takes a managerial view of strategy, thus leaving hidden, for example, issues such as how inequality and discrimination are perpetuated through the dominant strategic discourse, and how strategists are shaped by and shape the social and economic institutions in which they are embedded. Of course, there are exceptions (Bjerregaard 2011); Kellog 2009; McCabe 2010; Lüscher and Lewis 2008; Rouleau 2005; Thomas, Sargent and Hardy 2011). Mantere (2008) explicitly sets out to explore the influence of role expectations on the work of middle managers, both their own and that of their senior managers, thereby starting to bring together considerations of how the strategic work of middle managers is embedded in a wider structure (here, role expectations).

Accordingly, there is more to be done by adopting social-practice-based and discourse approaches. As the foregoing discussion suggests, part of what is needed involves incorporating other social theories (de Certeau, Latour, Bakhtine and so forth) and a dose of epistemological pluralism. A fuller picture of middle manager strategy practice, for example, should go more deeply into the fine-grained analysis of their practices while connecting them with economic, social and environmental outcomes. This may require the incorporation of ideas from social sciences domains, as well as organizational economics and governance theory that have heretofore been seen as distant from, or even antagonistic towards, the strategy-as-practice agenda. Pursuing this opportunity will require an epistemological dialogue and, ultimately, a translation of such constructs into epistemologically consistent terms.

Increasing the range of methods

The above review reveals the extent to which current work relies on interviews, and, in fact, retrospective interviews in particular. More work is needed that, for example, observes middle managers in action or draws them in as co-researchers. Johnson, Melin and Whittington argued back in 2003, in the first special journal issue on strategy as practice, that most research followed a 'recipe' founded in the process tradition, based on case study and ethnographic research – approaches with data collection centred on interviews, observation and documentation. This is even true of much strategy-as-practice research on middle managers. The calls by

Balogun, Huff and Johnson (2003) for innovation in methods to get closer to practice, in order to encourage greater self-reflection from respondents, have largely been ignored when researching middle managers.

Balogun, Huff and Johnson (2003) in particular call for the use of interactive discussion groups such as focus groups, self-report methods such as diaries, and practitioner research in which respondents become collaborators. Some have used such methods for researching middle managers (Balogun and Johnson 2004; 2005; Hope 2010). Others have called for the use of narratives of work life stories (Rouleau 2010). These methods remain rare, however. Other kinds of self-reports, such as personality instruments, would be useful in building an understanding of how constructs such as core self-evaluation and self-confidence, which have been studied among top managers, relate to middle manager willingness to engage in risky practices, such as those associated with resistance towards induced strategic change. Even a method such as repertory grid technique (Huff 1990) and the construction of so-called mental maps would be useful for a better understanding of how middle managers think about the institutional contexts within which strategy practices are embedded. In sum, recognizing that practices are thoughtful phenomena implies a search for links between the inner and outer worlds of middle manager strategy praxis.

Methodological innovation has recently occurred in strategy-as-practice research, through the use of video and video-ethnography in particular. This is allowing researchers to get closer to the practice of strategy by middle managers (Teulier and Rouleau 2013). Such methods position the researcher as interpreter, however, and do not encourage greater reflection by practitioners themselves. Furthermore, methodological innovation needs to extend beyond data collection. Langley and Abdallah (2011) explore templates in qualitative strategy research and reveal how much research either follows the Gioia method (in-depth longitudinal single-site case studies) or the Eisenhardt method (multiple case studies). Both these approaches come with particular epistemological foundations and a specific logic, which influences not just how data are collected but also how they are then analysed and presented. These templates become 'iron cages' and a straightjacket in themselves, as others seek to emulate approaches that have apparently led to successful publication. There are alternatives for analysis, presentation and write-up in middle manager research, however, such as the use of vignettes (Balogun *et al*. 2005; Rouleau and Balogun 2011).

Improving coherence and consistency

The third challenge is a lack of coherence and consistency in strategy-as-practice research on middle managers, preventing the drawing together of research to develop cumulative SAP research on middle managers. As seen in the literature review, research generally identifies diverse sets of practices and activities that are generally very specific to the middle managers in the context studied. As we have been able to group these studies through four lenses, there are certainly some

communalities or consistency between them. Nevertheless, there is a need for future strategy-as-practice research on middle managers not only to take the position of opening the black box of their roles but also to make a specific effort to build on existing knowledge about them. Moreover, there is a need to advance our knowledge of the concepts developed by strategy-as-practice researchers related to middle managers' strategy work, such as, for example, strategic conversations (Hoon 2007), discursive competence (Rouleau and Balogun 2011), the paradoxes of performing, belonging and organizing (Lüscher and Lewis 2008) and generative dialogue (Thomas, Sargent and Hardy 2011). These notions might help strengthening the coherence and consistency challenges that a research stream faces as it grows (Rouleau 2013).

Another way to increase the coherence and consistency of strategy-as-practice research on middle managers is, according to Balogun, Huff and Johnson (2003), to draw together multiple data coming from diverse in-depth case studies. To our knowledge, though, there is only one example in the SAP field in which different research projects are drawn together to throw light on an aspect of strategy work, and, coincidentally, it is a middle manager study (see Rouleau and Balogun 2011). The multiplicity of theoretical approaches does make it hard to draw together existing studies to make a coherent statement about particular aspects of middle manager strategic work. On the other hand, Rouleau and Balogun (2011) show that, even when data are collected through different methods, it is then possible to bring together the two different data sets to throw light on a common phenomenon. This does require collaboration between researchers, however, and not just the reading of each other's work. We would suggest that, given the number of data sets that now exist on middle managers, drawing these data sets together to synthesize conclusions about the nature of middle manager strategic practice could be a valuable endeavour for researchers in the field.

Paying attention to sociomateriality and embodiment

Building on the practice turn, strategy as practice is also concerned with sociomateriality – how tools and locations, for example, configure strategic interactions between bodies and things (Balogun *et al*. 2014; Jarzabkowski, Spee and Smets 2013). This challenge is being taken up in the field more generally, but it is still absent from middle manager research, although as Balogun *et al.* (2014: 29) point out, it is not that sociomateriality is absent from existing studies but, rather, that it has not been the focus. Research on middle managers and sensemaking, for example, reveals the significance of material items and practices. Rouleau's (2005) middle managers were working with clothes from a fashion range when seeking to engage and discipline their customers. Rouleau and Balogun (2011) reveal the role of, for example, room arrangements and gestures in middle manager discursive competence.

We still need to do more to understand how middle manager strategic practices are embodied and materially mediated, however, and how this situation differs – if it

does – for middle managers as opposed to more senior managers. In addition, we should explore how middle manager emotions, and their display, influence their strategic practice, though the exploration of emotions and strategy work remains in its infancy (see, for example, Liu and Maitlis 2014). Such research will simultaneously advance what we know about middle managers' sensemaking and their discursive, political and even institutional practices.

Encouraging critical reflection

We point out above that a criticism of much research on middle managers, and strategy-as-practice research in general, is that it does not encourage reflection and engagement by the participants involved. As Ketokivi and Mantere (2010) suggest, the goal of researchers in the organizational sciences is scientifically informed prescription, and this is likely to require links between middle manager strategy practices and outcomes recognized by practitioners as worth pursuing. Therefore, we still need to engage more fully with methods that encourage participants to provide their point of view on what is critical (through, for example, self-report methods: see Balogun, Huff and Johnson 2003), or that encourage participants to explore their understandings of their situation and their work together, encouraging deeper reflection (through, for example, focus groups), or to even become co-researchers, exploring themselves and their practices alongside the academics. Such approaches may have more potential for use among middle managers than among senior executives, purely because the greater number of middle managers makes it more feasible to bring together a group of them in an organization. There are also other means through which we can build greater critical reflection into research on middle managers (though this is not unique to middle manager research). For example, we should consider working in partnership with organizations. Research supported by consortia of organizations can be used to encourage the organizations to reflect on and challenge the interpretations of researchers on data collected in their organizations.

As suggested by Vaara and Whittington (2012), we should also develop a more critical view of strategy-as-practice research in general and on middle managers in particular. For example, we started this chapter by highlighting the changing nature of the discourses on middle managers and the nature of their role. While research is increasingly recognizing the strategic nature of their work, this is not always the case in organizations. How, then, do the traditional discourses, which typically devalue the nature of middle managers and their roles yet pervade organizations, and even extend into the institutional realm, affect the strategic work of middle managers? How is this different in organizations taking a more participative view of middle managers (Canales 2013; Mantere and Vaara 2008)? How do the more general discourses about organizations, and the forms they should take in response to a more global world, lead to restructuring in organizations, including the redefinition of middle manager roles and degrees of autonomy and participation? How do middle managers promote and resist this (Balogun, Jarzabkowski and Vaara 2011)?

Addressing the challenges

Addressing these challenges demands an ambitious research agenda. We would suggest that future research should be designed to respond in an integrative way to all five challenges. The most impactful work is likely to arise out of studies that take practice theory as a starting point, are motivated in the context of prior work, employ innovative methods, incorporate sociomateriality and draw on managers' critical reflections. For example, more work is needed that extends what we know about middle manager practices in their various strategic activities. Imagine that video recordings of middle managers' meetings, either with their superiors, subordinates or colleagues, could be played back to middle manager participants in groups and/or as individuals with an eye towards seeking their self-understandings of what they do to participate in the meeting. Moving beyond discursive practices, self-interpretations could yield insights into practices that would otherwise be difficult to observe, such as those associated with influence attempts, coalition-building and resistance. Such a robust data set is likely also to address so far unanswered questions about differences between senior and middle manager practices, the impact of physical space, the body and material objects, and the role of middle managers' emotions. Coupled with videos of the meetings themselves, interview, archival and observation data of middle manager efforts to design and orchestrate meetings could provide the kind of 360-degree interpretations required to get a holistic sense of how institutionalized structures interact with middle manager agency to influence meeting outcomes such as shared intentionality regarding deliberate strategic change.

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