



## Essay

# Steven W. Floyd: His legacy as a scholar and academic community builder

Strategic Organization

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**Julia Balogun** 

University of Liverpool Management School, UK

**Christoph Lechner**

University of St.Gallen, Switzerland

**Linda Rouleau** 

HEC Montreal, Canada

**Bill Wooldridge**

University of Massachusetts Boston, USA

## Abstract

Steven W. Floyd sadly passed away in October 2022. This essay is written in memory of him. Our intent is to celebrate Steve's lasting legacy, which includes not just his track record as a distinguished scholar in the field of strategic management but also his unselfish citizenship in the academic community. During his career, Steve mentored and supported numerous junior faculty and doctoral students, served as an editor of several journals, and provided institutional leadership both at the Schools where he worked and within the field's professional societies. We are honored to have been asked to write this essay as individuals who worked with Steve and knew him as a colleague and friend.

## Keywords

strategic planning, strategy as practice, strategy formulation, strategy implementation, strategy process

## Introduction

Steven W. Floyd, known as Steve to his family, friends, colleagues, and collaborators, sadly passed away in October 2022. This essay is written in memory of him at the request of SO! Our intent is to celebrate Steve's lasting legacy, which includes not just his track record as a distinguished scholar in the field of strategic management but also his unselfish citizenship in the academic

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### Corresponding author:

Julia Balogun, University of Liverpool Management School, Chatham Building, Liverpool L69 7ZH, UK.

Email: [jbalogun@liverpool.ac.uk](mailto:jbalogun@liverpool.ac.uk)

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We are honored to have been asked to write this essay as individuals who worked with Steve and knew him as a colleague and friend. We hope that in what follows, we have captured not just his scholarly contributions but also his legacy as a leader supporting the development of the Strategic Management Society and journals such as the *Journal of Management Studies* and the careers of many early career researchers and his role as a bridge bringing together scholars from the United States and Europe at a time when the two research communities were more separate.

## **Establishing an identity as a scholar**

A baby boomer born in 1950, Steve began his professional career among a cadre of young managers who ultimately challenged the command-and-control management style of the World War 2 generation (Ansoff, 1965). In 1978, he became the President of a small entrepreneurial manufacturing firm where his emphasis was the professionalization of the management team. He invested heavily in his managers' training and development and practiced facilitative leadership, stressing consensus building over traditional edict-driven approaches.

When he began his doctoral studies in 1981 the "strategy formulation/implementation" dichotomy very much dominated the academic strategic management literature (Porter, 1979). At the same time, new information technologies were emerging and there was a growing sense that these would replace middle managers, who were seen as mere implementers of top management strategies.

Open-minded and curious, Steve's dissertation examined the role of information technologies in large organizations. Tasks were categorized based on the degree to which they were routine and repetitive versus novel and complex. His data showed that, while extremely useful for enhancing efficiency, information technologies at the time were relegated to what he referred to as "phantom" functions and in no way were they a replacement for the judgment and decision making of managers. Given what we know now and the development of AI, these findings may have been more recognized as more significant making Steve more of a pioneer in this area than they were considered then, given their implications for the development of information technologies. Yet it wasn't this research for which he became known.

Graduating from his PhD at Colorado in 1985, he moved first to Old Dominion University and then to the University of Massachusetts in 1986, where his long-time friend from his days as an MBA and PhD student at Colorado, Bill Wooldridge, was already working. With his academic career beginning to develop, Steve's interest in strategy process from his time as a manager drew him to literature that examined how consensus on strategy among members of the top management team influenced organizational performance (Bourgeois, 1985; Dess, 1987). While theoretically compelling, empirical studies in this area had failed to consistently show a clear relationship between TMT consensus and firm performance. These equivocal findings led Steve, working with Bill, to posit that the relationship between consensus and performance might depend on the scope and content of such agreement—that is, who was included in the definition of strategic agreement and what they agree about (Wooldridge and Floyd, 1989).

The original case for a consensus-performance link was that agreement among top managers would result in a coherent set of arrangements (structure, control systems, etc.) that would compel efficient implementation by middle managers. This "thinking versus doing" assumption (Mintzberg, 1990) prevented researchers from recognizing that even if organizational arrangements

encouraged appropriate activity, efficient implementation might not occur if managers at various levels didn't understand strategy or weren't committed to it. To address this concern, Steve and Bill collaborated on a study that examined strategic consensus among middle-level managers (Wooldridge and Floyd, 1990). The thinking was that managers' involvement in strategy-making would drive their understanding and commitment to it.

The findings were interesting in that they showed that only when middle managers were involved in setting goals and generating alternatives was the effect on performance significant. This study was the first to demonstrate middle managers' substantive contributions to strategy-making in a large-sample statistical study. From these early origins, a long-term collaboration on the strategic significance of middle managers between Steve and Bill was born, extending for over 30 years to Steve's and Bill's retirements.

Steve and Bill launched a second study (Floyd and Wooldridge, 1992) in which they set out to identify specific strategic roles for middle managers and identified a set of middle manager strategic roles and their characteristics. This led to the establishment of a research agenda by Steve and Bill on the strategic role of middle managers and which ultimately influenced many other scholars to take up research into the strategic role of middle managers. Their early work put middle management behavior in the context of strategy making and provided evidence that patterns of middle management activity were related to the development and realization of organizational strategy. For the next several years, Steve who moved to UConn in 1990 continued to examine managers' involvement in strategy-making with Bill and many others, co-authoring papers and two books on the subject. The significance of their influence in developing this defining middle manager research avenue ultimately resulted in a lifetime achievement award from the Strategic Management Society (SMS) for both of them as a team.

By the time Steve came up for tenure, he had made significant contributions to the strategy process and renewal literature. His work had been published in the best journals in the field and was now regularly included in PhD strategy seminars. While for many, this might have been a cause to reflect and unwind, Steve's natural curiosity for people, places, and ideas led him to a sabbatical at Cranfield University in the United Kingdom and a new chapter in his academic life. There, he began to develop a diverse cohort of international co-authors and friends and embarked on research from which he made his most meaningful and durable contributions to the strategic management academic community.

## **Career shaping sabbatical: Cranfield School of Management**

At the invitation of Gerry Johnson, Steve spent his first sabbatical, in the mid-1990s, in the United Kingdom at the Cranfield School of Management. At the time, strategy process and strategic change were primary subjects for many scholars in Europe, including Andrew Pettigrew, Gerry Johnson, and Richard Whittington. Steve focused on their work and the European research community, sharing with them an interest in moving away from the traditional formulation-implementation dichotomy prevalent in the mainstream Strategic Management literature. Research on strategy process and change as well as qualitative methods were more in favor at European institutions than at US schools with their emphasis on content-related research and quantitative methodologies. Although the distinction between strategy "content" and strategy "process" has been engrained since the strategic management field emerged around 1965, many US scholars trained in economics continued to prefer the former, whereas in Europe, many scholars were more interested in the latter and how strategies developed and changed over time. This chimed with Steve's interest in emergent and autonomous strategy formation and the role of middle managers. When Steve

returned to the States at the end of his sabbatical he brought with him new ideas, friendships, and collaborations that importantly shaped the rest of his career.

His connection with the European and process communities was also career-shaping for others, such as two authors of this essay, Julia Balogun and Linda Rouleau, who expanded the research by Steve to explore in their own research the strategic roles of middle managers with his encouragement. They shared workshops and events at conferences with him, developing the middle manager agenda, although they didn't publish together until much later (Rouleau et al., 2015).

## **Collaborating and mentoring others**

By the time he returned to North America, Steve had changed his approach to research. Instead of leading and pushing forward research projects on his own or with similarly ranked colleagues, he began to devote more time and attention to joint research projects with PhD students and junior faculty. In these collaborations, Steve nurtured the development of his junior colleagues, making a lasting impression and a significant difference in the trajectory of their careers. This approach continued for the remainder of Steve's career and is an enduring facet of his legacy.

For example, Steve co-authored articles on strategy consensus with Franz Kellermanns (now at the University of North Carolina) and Jorge Walter (now at George Washington University). Conceptualizing strategies in the form of "strategic initiatives" in the Bower-Burgelman tradition, he carried out research with Christoph Lechner and Karolin Frankenberger (both now at the University of St. Gallen) on the micropolitics and social embeddedness of strategic initiatives. With his former PhD student Carola Wolf (now at the University of Liverpool), he examined research on strategic planning. Indeed, a look at his publication record reveals that Steve worked not with a limited set of other scholars but combined his efforts with an impressive group of academics, ranging from PhD students to post-docs, and assistant and associate professors.

Throughout the inevitable ups and downs of research projects, he was able to keep his colleagues highly motivated and focused on the overarching goals. He was flexible in adapting his work and often generated and followed new insights emerging from qualitative or quantitative data. Steve had a "golden touch" when crafting and polishing papers for submission to journals. He knew how to avoid harsh breaks in a paper's flow, how to build connected chains of arguments, and how to distill the main message. He generously shared his skill in crafting outstanding papers with younger scholars, working not only to advance a given project but also to develop these abilities in others.

Due to his talent and extensive experience, Steve was able to successfully re-construct and re-write papers based on the critical comments of reviewers, including those of the junior scholars he was advising. He was able to share his knowledge on how to handle reviewers in a non-aggressive way and how to carefully take their comments into consideration. He always viewed research as a "conversation" between researchers and their unknown reviewers representing the academic community. This did not necessarily mean that he always adopted their proposals and simply tried to accommodate their views. However, even when he disagreed with their critiques, he did so in a gentle way by finding common ground, or diligently and politely arguing for his case.

It is understandable that junior and senior colleagues alike were impressed by Steve's capabilities and tried to learn as much as possible from his work. The field of knowledge management defines "tacit" knowledge as knowledge that cannot be expressed in explicit form but must be observed in the complex ways of professionals and imitated over longer periods of time. This transfer of "tacit" knowledge from Steve to other researchers was one of the reasons why so many scholars sought his attention and tried to engage him in joint research projects. They felt that they could develop invaluable skills by collaborating with him and took every opportunity to do so.

## **A continued connection with Europe**

Although Steve returned to the University of Connecticut following his sabbatical at Cranfield, he never lost contact with his colleagues in Europe and he was eventually convinced to take on the role of editor for the *Journal of Management Studies*. He was first an Editor and then General Editor from 2004 to 2010 and was one of the first non-UK editors of the journal, helping to internationalize its reach and its community.

Several years later Steve's involvement with Europe grew when he accepted a position as Chair for Strategic Management at the University of St. Gallen (Switzerland) in 2005. In this position he also became Co-Director of the Institute of Management & Strategy. As a co-director of a large institute, he was involved in leading people, guiding PhD assistants, and undertaking entrepreneurial initiatives. The University of St. Gallen is deeply embedded in a network of executives, corporations, alumni, joint research-practice projects, and executive education. In his new role, Steve had to deal with the demands of numerous stakeholders, and indeed, much of what attracted Steve to St. Gallen and Europe was its focus on real-world relevancy.

Within this new setting, new insights had to not only be publishable in respected journals but also have a clearly visible impact on the managerial world. Steve embraced this criterion and his new role. He believed that the study of strategic management was an applied science rather than a form of science relevant for its own sake. Given this underlying assumption, Steve was always interested in real-world phenomena, and he carefully chose his research topics, such as initiatives, consensus-building, or strategic renewal, for this reason. He was eclectic in the selection of theories he applied to explain these phenomena and saw limited sense in applying one dominant theory throughout his work, as other scholars did and still do. As a result, executives from numerous firms sought Steve out for his opinions and judgments on real-life strategic issues. This led to several projects with firms such as Siemens, ABB, UBS, and Daimler in which his strategy process skills were highly valued. For example, he undertook research with Maximilian Kownatzki (now CEO of the airline Sun Express) on decision-making speed between corporate and business levels.

## **Back to the states: leadership in the field as a distinguished scholar**

In 2011, Steve moved back to the United States for family-related reasons, first to the University of Virginia and then to the University of Massachusetts Amherst, where he stayed until his retirement in 2019. Amherst was something of a homecoming for Steve, since, as mentioned above, he worked at Amherst from 1987 to 1990 as an Assistant Professor. Bill Wooldridge, his long-standing collaborator in middle manager research, was still at Amherst as were many old colleagues. By the time he returned to the United States, Steve's research record of over 100 scholarly articles and books clearly established him as a distinguished scholar, playing a significant role in shaping the field of strategy. Undoubtedly, his research on middle management constitutes the core of his scholarly contribution (Floyd and Wooldridge, 1992, 1994, 1996, 1997, 2000; Wooldridge and Floyd, 1990), yet over his career, he made significant research contributions in three areas: the strategic roles of middle managers, strategic renewal and implementation, and strategy processes and practices. While these research themes were part of his research agenda during his entire career, we can also see them as three interrelated ways of approaching strategic change that characterized Steve's academic production over time.

His research on middle managers moved beyond promoting the view of middle managers as strategic assets instead of a necessary evil, providing researchers with a set of foundational strategic roles and behaviors (Floyd and Wooldridge, 1992). It also invited researchers of strategy to consider the multi-directional roles that middle managers have, which is an area in which those

researching middle management are still looking to advance our knowledge (see, for example, Tarakci et al., 2023).

Although Steve's interest in middle manager research and his collaboration with Bill Wooldridge never faded over the years (Floyd and Wooldridge, 2017; Rouleau et al., 2015), Steve's concern for resolving conflicts and achieving performance, as well as his international life experience, led him to investigate the organizational level of strategic change. His work on strategic renewal and implementation with the collaborators mentioned above provided space for developing analyses that bridged multiple levels of strategic roles (top, middle and operating) with the diversity of organizational issues (e.g. time horizon, information requirements and core values), which created dissensus and conflicts during strategic renewal and implementation. This work provided the strategic management field with frameworks and propositions on the nature of consensus and its management (Floyd and Lane, 2000), the norms of constructive confrontation in management teams (Kellermanns et al., 2008) and the effect of strategic alignment on consensus–performance relationships (Kellermanns et al., 2011; Walter et al., 2013). It is worth noting that in this work on strategic renewal and implementation remains of utmost importance for current research in strategic management, given that Steve and his colleagues as mentioned above militated for ignoring the traditional divide between strategy formulation and implementation dear to mainstream strategic management literature. For instance, in their review of the past 40 years of strategy implementation research, Weiser et al. (2020) called for “the continuous interplay of conceptualizing and enacting strategies at multiple hierarchical levels and in multiple organizational units simultaneously” (p. 969).

By the end of the first decade of the 2000s, Steve's work had taken an integrative turn. He expanded his reach exploring new territory with other senior scholars by examining linkages between strategy process research and the emerging strategy-as-practice movement. Focusing on the processes and practices involved in strategy-making allowed him to reconcile his research interests with strategy practitioners and the organizational level of strategy-making (Burgelman et al., 2018; Floyd et al., 2011; Johnson et al., 2010; Prashantham and Floyd, 2012, 2019). In part it was Steve's strong convictions about the need to consider what managers do and the role of organization in strategy literature that led him, in the second decade of the 2000s, to connect with the strategy-as-practice community. His research on the ritualization of strategy workshops (Johnson et al., 2010), learning (Lechner and Floyd, 2007), and the routinization and liminality of the internalization process (Prashantham and Floyd, 2012, 2019) allowed him to develop a strong interest in looking at “strategy as patterns of activities and as the performances or practices that make up these patterns” (Floyd et al., 2011: 934). He became a fervent promoter of process- and practice-oriented approaches. We all will remember how proud he was when he used the SAPP (for strategy as practice and process) label during his last academic interventions.

Steve also influenced generations of strategy scholars by writing thorough literature reviews, setting stimulating research agendas on middle managers (Wooldridge et al., 2008), strategic renewal and implementation (Kellermanns et al., 2011, 2005) and strategy processes and practices (Burgelman et al., 2018; Wolf and Floyd, 2017). One aspect that is less known concerns his reflexive work related to central theory-building debates in management and organization research. Some of us might remember his paper on the issue of conflict over credit in joint research, in which he and his colleagues set up four collaborative approaches for handling such situations and finding mutually beneficial solutions (Floyd et al., 1994). With other colleagues, he tackled controversy regarding the practical relevance of academic research by examining 120 publications in leading management journals, arguing for a positive association between academic quality and practical relevance (Baldrige et al., 2004). In 2009, he wrote for the *Journal of Management Studies*' Point-Counterpoint section about theory borrowing, suggesting that the two positions in this



debate—develop management field by integrating theory from other disciplinary domains or by building on managerial notions as if it was a distinctive and autonomous field of research—needed to be reconciled (Floyd, 2009). A few years later, he discussed the need for and benefits of combining different traditions of strategy and organizational research by emphasizing the difference and complementarity of “umbrella” and “bridging” constructs in theory building (Floyd et al., 2011). In all these debates, Steve was always on the side of scholars who looked to build interconnexions between opposite visions of the world to achieve a truly cumulative body of knowledge in management and organization research.

## Bridge building and institutional leadership

A significant aspect of Steve’s career that distinguishes and differentiates him was the leadership he exercised, not just in his field through his research, but in the wider management discipline through his editorial and learned society roles. This leadership served to bring European and US research traditions and scholars together. Three significant parts of this leadership stand out. First, his role as the General Editor of the *Journal of Management Studies*. Second, his roles at the SMS and his Associate Editorship of the *Strategic Management Journal*. Third, he took more general leadership roles in which he also encouraged the bridging of communities.

As noted previously, Steve spent his first sabbatical at Cranfield School of Management in the United Kingdom, and the reputation he established there eventually led to editorial roles at the *Journal of Management Studies*. As one of the first non-UK editors of the journal Steve played a significant role in helping to internationalize the journal’s reach and its community. In their farewell to their roles as General Editors of the journal in 2009, Tim Clark and Mike Wright wrote of their efforts to develop the journal,

our aim was to build upon the traditional strengths and distinctive ethos of the Journal . . . (and) ensure the Journal’s continuing pre-eminent standing within the international business and management community. We placed particular emphasis on enhancing JMS’s long-standing, but sometimes forgotten, tradition as an independent, broad based management journal of international standing.

Steve was a crucial part of this effort. In particular, he was able to champion the journal in the US emphasizing its developmental as opposed to gatekeeping review process, making it a “go to” journal for US academics who had not previously considered it as an outlet for their work. Working with Mike Wright and Tim Clark he also played a central role furthering professionalization of the journal’s operation.

At the SMS, Steve provided leadership as an executive board member and treasurer, and during a pivotal phase, as SMS moved to become a more professional organization. Over the years, SMS has become an important membership organization for strategy scholars, not just because of its pre-eminent and leading journal, the *Strategic Management Journal* (SMJ), but for the conferences it runs and its community-building activities. Without the SMS and SMJ, it is doubtful that the strategic management field would have become the strong force it is as it evolved from the field of business policy. As such, Steve’s role at SMS provides another legacy important for strategy scholars today.

Steve also served as an Associate Editor of the SMJ. As with JMS, his work as editor enabled him to continue his development of junior and emerging scholars through his ethos of developmental reviews. Steve was always thoughtful in his approach to the work by others, weighing its merits but also considering how he could help them to improve their research and their communication of it. His work with SMS was such that in 2018, he was awarded an SMS Service Award. Only one of these is awarded each year and it is conferred

in recognition of significant and enduring service that made an outstanding and distinguished contribution to the Strategic Management Society and its members. The recipient is a person who has rendered lengthy, significant, and effective service to the SMS and its members. (<https://www.strategicmanagement.net/award/sms-service-award/>)

Alluded to throughout this essay, a third important aspect of Steve's leadership was his activities in building bridges across research traditions and geographic boundaries. As an example, his 2017 co-edited volume includes scholars from across the globe and brings together a large body of work that forms a foundation for others to build on. Also noteworthy, was his involvement in bridging the academic strategy process and strategy practice communities, the latter being largely European in its genesis. This led to him championing and editing alongside those from the strategy practice tradition, a 2018 SMJ Process and Practice Special Issue. More generally, a look at his publications list shows the extent to which in his role as a mentor he connected many scholars from the United States to others globally, although particularly in Europe. His CV shows a remarkable array of co-authors — at different career stages, backgrounds, nationalities, etc. He truly was an international bridge both intellectually and socially.

Throughout his career, he placed a heavy emphasis on developing others' research capabilities and interests. While an associate professor at the University of Connecticut, for example, he organized and hosted the first SMS mini-conference on strategy process. From 2004 through 2007 he served as an AIM (Advanced Institute of Management) Visiting International Fellow. AIM was launched in the United Kingdom in the early 2000s to provide UK scholars with funding to develop management research in the United Kingdom. Overlapping with his time as General Editor of JMS, Steve generously shared his significant knowledge about research and the publication process with AIM scholars. He brought to academics involved in AIM his strength in theorizing developed through his strong embeddedness in the tradition of theory building from empirical research.

## **The legacy**

Looking back over his career, we can see that Steve's scholarship has not only had a significant impact on the field of strategic management and its variants but has also inspired generations of researchers to research middle managers and their strategic roles, strategic renewal and implementation, and strategy processes and practices. He has also influenced the development of many individuals in ways that have been career shaping for those individuals. In other words, consistent with the integrative approach he has shown in so much of his research, he has influenced both research content and process. His research provides lessons for current and future researchers and can and should continue to guide current and future research agenda.

Steve began examining the role of middle managers at a time when strategy research strongly focused on top managers, with middle managers considered largely irrelevant and even dispensable, being little more than a linking pin, there to carry out senior manager instruction and link them to the wider organization. This work has, therefore, two important legacies. One this work on middle managers invites others to never be afraid to challenge the status quo and offer a different perspective to advance knowledge, and in order to produce not only rigorous but also relevant knowledge that helps managers cope with the key strategic challenges of contemporary organizations. Two, the middle manager research agenda remains relevant today. Indeed, the *Handbook of Middle Management Strategy Process Research* published by Steve and Bill 8 years ago now, still contains within it a research agenda for middle management research that can deepen our understanding of middle manager strategic roles and practice. Furthermore, since that book was published, we know organizations are changing and will change even more rapidly through AI. This



does not make middle managers redundant but rather means we need to set a new research agenda to understand what it does mean for middle managers and their strategic engagement. This also brings us full circle, potentially, to the topic Steve chose for his PhD. An additional extension is a consideration of the role of middle managers in advancing strategic agenda in organizations that relate to grand challenges and the UNSDGs, such as climate change or decent work and economic growth, maybe as institutional entrepreneurs.

A second legacy that should be carried into contemporary research agenda is the understanding by Steve that although he was highly interested in studying middle managers, he should not neglect and separate the study of them from their organizational environment. His work on middle managers, as well as on strategic renewal and implementation, reminds us of the importance of considering in research the complex and dynamic interactions between different organizational and hierarchical levels in which strategy is formulated and/or executed. A way of doing this that Steve turned to toward the end of his career, as noted above, is the use of process- and practice-oriented approaches, which he labeled SAPP. Here is the opportunity for another rich research agenda. Although strategy-as-practice researchers have been some of the strongest supporters of the middle manager research agenda (see Rouleau et al., 2015), there is still wide scope for additional research drawing on practice-based approaches a decade on from this chapter's consideration of progress made in middle manager research by "SAPP."

Third, building on the last point in the paragraph above, his entire research on strategy-making has been largely oriented toward finding integrative ways of using and reframing traditional dualities in strategy (e.g., content versus process approach, planning versus implementation, content versus process approach, process and practice). This approach is also typified in the way Steve managed to (very successfully) integrate North America and European perspectives. Strategic Management scholars should continue to follow in his footsteps and work to improve consensual relationships between diverse domains and research communities. This requires an openness of mind that all too often is not displayed. As an academic community, we are far more likely to resist perspectives different from our own and reject efforts at integration, seeing such efforts as a potential threat to theoretical purity rather than as a pragmatic way of moving knowledge frontiers forward. We would like to challenge our fellow academics to show the open-mindedness that Steve was capable of. The example of bridging European and North American perspectives on strategy and how we study it also suggests that curiosity and bravery are assets in setting influential research agenda, requiring individuals to explore strategy and strategy-making outside of their own cultures.

Finally, Steve has been exemplary in writing every academic piece with the aim of cultivating strong and fruitful collaborations with senior and junior academics to advance impactful research. In this endeavor, he was also educating himself, recognizing the significant potential for learning between senior and early career researchers when senior colleagues see themselves acting in a developmental capacity, rather than in the capacity of molding junior colleagues in their own image. More than ever, we should do the same to develop research practices that will contribute to making a better academic world while conducting strategic research that makes a difference in how our organizations are managed, recognizing what early career researchers bring to their field with their different world views and understandings.

## Summary

Richard Whittington, at an event to commemorate Steve at the Academy of Management in Boston, Summer 2023, described Steve as a scholar and a gentleman. This is probably one of the most fitting epitaphs for Steve. His intellectual legacy is without question. However, so is his personal

legacy. He will be missed for the so many contributions he was able to make to debates and discussions in a way that always had an impact and yet never offended. He was always courteous. He was always sincere. And he always succeeded in making the positive difference he wanted to make. He is missed by so many as a friend as well as a collaborator and a colleague.

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## ORCID iDs

Julia Balogun  <https://orcid.org/0000-0003-2863-004X>

Linda Rouleau  <https://orcid.org/0000-0002-4349-9628>

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## Author biographies

Julia Balogun is the Dean and the Brett Chair in Management at the University of Liverpool Management School. She is best known for her research on processes of strategy development and strategic change. She has a particular interest in how large corporations can be transformed to both retain and regain competitive advantage, focusing on the nature of the practices, actions, and activities of senior executives and middle managers engaged in corporate renewal, organization transformation, and radical restructuring. She has published in international journals such as *Academy of Management Journal*, *Organization Science*, *Organization Studies*, *Journal of Management Studies*, *Journal of International Business Studies*, and *Human Relations*. Her book on strategic change is in its 4th edition. Address: University of Liverpool Management School, Liverpool L69 7ZH, UK. [email: jbalogun@liverpool.ac.uk]

Christoph Lechner is a Chaired Professor of Strategic Management at the University of St. Gallen, Director of its Institute of Management & Strategy (IfB), and Academic Director of its “Master in General Management” (MGM). He also works as a Senior Advisor for the Boston Consulting Group (BCG). He published his work in leading academic journals such as *Strategic Management Journal*, *Academy of Management Journal*, *Academy of Management Review*, *Long Range Planning*, *Journal of Management*, *Strategy Science*, as well as in practitioner journals such as *Sloan Management Review*, *California Management Review*, or *Harvard Business Manager*. His current research interests are in the areas of digital platforms, ecosystems, and corporate strategy. His research has won several awards, such as the Sumantra Ghoshal Research and Practice Award of the Academy of Management, the Best Conference Paper Award of the Strategic Management Society, or the Best German Book Award of the VHB Society. Address: University of St. Gallen, Rosenbergstrasse 20-22, 9000 St. Gallen, Switzerland. [email: christoph.lechner@unisg.ch]

Linda Rouleau is a Professor of Organization Theory at the management department of HEC Montreal. Her research work focuses on middle managers, strategy-as-practice, and organizing and strategizing in extreme contexts. Over the years, she has published in peer-reviewed journals such as *Academy of Management Review*, *Organization Science*, *Accounting, Organization and Society*, *Organization Studies*, *Journal of Management Studies*, *Human Relations*, etc. She has co-edited the third edition of the *Cambridge Handbook of Strategy as Practice*. She is a senior editor for the journal *Organization Studies*. She recently published a book titled *Organization Theories in the Making* published by Oxford University Press. Address: HEC Montreal, Montréal, QC H3T 2AZ, Canada. [email: linda.rouleau@hec.ca]

Bill Wooldridge is a Professor Emeritus at the University of Massachusetts, Amherst. During his time at UMass he served as chair of the management department and founding director of the Berthiaume Center of Entrepreneurship. Professor Wooldridge received his PhD from the Leeds College of Business, University of Colorado. With Steve Floyd, he is the co-author of three books on middle managers and their role in strategy making and corporate entrepreneurship. His research has been published in leading academic journals including *Entrepreneurship Theory and Practice*, *Strategic Management Journal*, *Journal of Management*, and *Journal of Management Studies*. In 2014 he received a lifetime achievement award (with Steve Floyd) from the Strategic Management Society. As founding director of the Berthiaume Entrepreneurship Center, his accomplishments were recognized as the “Outstanding Emerging Entrepreneurship Program” by the United States Association for Small Business and Entrepreneurship. Since retiring in 2018, Professor Wooldridge has supported the turnaround of several underperforming small businesses. Address: University of Massachusetts Boston, Boston, MA 02125, USA. [email: billwool99@gmail.com]