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Constructing Interlocking Rationales in Top-driven Strategic Renewal

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Under top-driven change, active involvement of middle managers in strategy-making requires top and middle to find common ground. The paper offers inductive theoretical development of top managers' role as enablers for the strategic contribution of the middle levels. Central to this role is the symbolic reorganization where the middle managers' position is set. Next, middle managers' operational efficiency allows their performance to be shown and increases their reputation. In consequence, the middle level can actively shape the role suggested by top management, which increases their power base. Finally, when these previous interactions escalate into a two-way process where the middle and top management contribute to each other's efforts, interlocking rationales are achieved.

> Our managers only made strategy their own when they stopped chiselling stones and started building cathedrals. (CEO of the case studied)

This quote reflects an important problem for organizations where managers lose on opportunities when they have a too narrow focus. Middle-management research has placed the emphasis on the contributions of the middle line to strategy-making (Balogun, 2003; Floyd and Wooldridge, 2000; Wooldridge, Schmid and Floyd, 2008). However, it is left implied that the role of top management is somewhat exogenous to middle-management involvement. This paper puts this assumption into question.

The relationship of top to middle management, when facing top-driven change, may vary from confronting and negotiating anticipated resistance to bluntly pushing through it (Stensaker and Langley, 2010). The present paper addresses the former by studying the role of top management as enablers for the strategic contribution of middle levels under top-driven change. Essential to studying middle-management involvement are the attention-based view (ABV) (Ocasio, 1997) coupled with the symbolic dimension of organizing (March, 2010; Smircich and Stubbart, 1985; Weick, 1995) and symbolic power (Bourdieu, 1991; Pfeffer, 1994). This paper uses the political dimension of the process, which is crucial in explaining both the strategy formulation process and the outcome of this process (Mintzberg, 1983, 1994a; Pettigrew and McNulty, 1995; Pettigrew, 1986; Shrivastava and Grant, 1985). This approach has been underused in previous research on strategy process (Carter, Clegg and Kornberger, 2008). This paper contributes to this debate by offering a novel conceptualization of the interactions between top and middle management, which integrates the ABV with the political dimension of the strategy process and symbolic organizing.

The central argument in this paper is that the process of enabling middle managers is based on genuine, upfront communication from the top, promoting independent middle managers, as well as on the middle managers becoming

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responsible for the outcomes of strategies that they have proposed. This is important, because strategy-making is better understood as a social process of continuous change where organizational members take part to different degrees (Balogun, 2003; Currie, 1999; Floyd and Wooldridge, 2000). To understand strategy making as a social process (Whittington, 2007), we need to fully understand the interactions that shape the process and the mechanisms through which strategy becomes crystallized through these interactions into an activity system (Spender, 1995). Hence, the question that has guided this research is how, through interactions, top management enables or hinders strategic involvement in managers across the organization.

Theoretical background

Middle-management research has encouraged the redirecting of the focus to the contributions of the middle line to strategy-making (Wooldridge, Schmid and Floyd, 2008). However, it has not considered the role of top management in encouraging middle-management influence. This paper addresses the issue of how involvement of managers across the organization is promoted by redirecting their attention structures.

Bottom-up strategy-making theories put the emphasis on middle-management involvement, but overlook the role top managers play to enable or trigger such bottom-up processes (Balogun, 2003; Brauer, 2009; Currie, 1999; Floyd and Wooldridge, 2000). Notably, empowerment rests on the assumption that encouragement given to middle managers results in higher involvement in company matters (Spreitzer, 1995). However, this link may still suffer from numerous fractures, such as middle-management scepticism about top-management commitment (Labianca, Gray and Brass, 2000) or mutual self-interest (Mantere, 2008) and general resistance to change (Mantere and Vaara, 2008). This paper addresses how the role of top management as enablers of middle-managers' strategizing can link their involvement with encouragement. This is important, as empowerment remains a desirable organizational feature (Zhang and Bartol, 2010) because it makes strategy-making much more than a centralized, top-down phenomenon (Balogun, 2003; Balogun and Johnson, 2004; Wooldridge, Schmid and Floyd, 2008). Linking encouragement and involvement is central to understanding organizing and strategizing, especially when research has shown that the processes of organizing and strategizing are better viewed as ongoing enactment processes, continuously realized through the performance of specific organizational activities rather than as one-off spectacular away-day events carried out by top management (March, 2010; Smircich and Stubbart, 1985; Wooldridge, Schmid and Floyd, 2008).

Effective use of power and influence is perhaps the most important driver of action (Pfeffer, 1994). In consequence, if strategy is made with the aim of being implemented, it is necessarily an exercise of mobilizing political support (Mintzberg, 1983). Exercises such as strategy planning do not really produce strategy, but they can encourage coordination and action (Mintzberg, 1994b). Such coordination tends to occur under a participative learning system which allows adaptive planning (Shrivastava and Grant, 1985). As with any common endeavour, strategy-making relies on interdependencies, and such interdependencies generate outcomes that are different from the requests of a single agent. 'Interdependence exists whenever one actor does not necessarily control all of the conditions necessary for the achievement of an action or for obtaining the desired outcome from the action' (Pfeffer and Salanzik, 1978, p. 40). Where several causal agents, such as different management levels, are involved, power and influence will operate through interdependencies to produce outcomes (Pfeffer, 1994). One way to structure interdependencies and, in consequence power relations, is through categories that divide and configure power, such as middle and top management. However, it is not because of 'structural position that an individual or group possesses certain power resources' (Pettigrew, 1977, p. 84). Although responsibility and authority are vested in positions (Pfeffer, 1992, p. 76), position, reputation and performance are interrelated, and if any of the three is favourable, the others will be positively affected (Pfeffer, 1994, p. 142). It is the skill of mobilizing all power sources that converts potential power into actual influence (Pettigrew and McNulty, 1995).

Unless interactions bridge activities and knowledge, middle managers will remains an underused resource (Balogun, 2003; Jarzab-

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kowski and Balogun, 2009). Based on a partial understanding, different actors will tend to have different concepts of the purpose and activity of what they do (Spender, 1995). To pursue coordination and shared activity, the activity system will need to integrate top-down intentions and bottom-up features (Blackler, Crump and McDonald, 2000). In activity systems, knowledge cannot be separated from the activity, hence strategic activities are normally carried out by social automatic behaviour (Spender, 1998). Because of this, only significant stimuli will be able to redirect social behaviour, reorganize the activities and refocus the interactions. This stimulus can be a shift in the attention structure.

Within the ABV (Ocasio, 1997; Ocasio and Joseph, 2005), the focus of attention determines what managers do. The ABV is a useful conceptual lens for this study, because it is based on the premise that the behaviour of a firm depends on how a firm channels and distributes the attention of its decision-makers (Ocasio, 1997). This focus, in turn, is affected by the variation in multiple, seemingly interrelated, surrounding contingencies (Brauer, 2009). The focus and the context are dependent on how the firm's structure of attention – rules, resources and social relationships – controls the distribution and allocation of managers into different activities (Ocasio, 1997). All the aspects drawn to the attention of managers will eventually determine what they do. According to the ABV, 'the firm's structures of attention – its culture and rules, formal structure, political leadership and resources – shape the firm's focus of attention, thereby guiding how strategy is formulated and implemented' (Ocasio and Joseph, 2008, p. 252).

The enacted environment concept from the symbolic dimension of organizing plays a major role in shaping attention. When organizational members actively form their environment, a pattern of enactment establishes the foundations of organizational reality (Smircich and Stubbart, 1985). If organizations and environments are created together (Weick, 1995), the primary role of managers becomes the management of meaning (Turnbull, 2001). In this paper, the focus is on attention as the main driver of meaning, but enacted environments will be formed by myriad elements such as talk, metaphors, symbols, promises, lies, threats and memories (Weick, 1985, p. 128). Attention can be directed as a means to simplify reality, making it feasible for the managers who operate that reality or symbolic balancing (Stensaker and Langley, 2010). The reason for this is that 'rather than seeking to understand a complex world, organizations often seek to create a simple world they can understand' (March, 2010, p. 113). Hence, a logic of appropriateness is used for decision-making by answering the question, 'What does a person such as I, or an organization such as this, do in a situation such as this?' (March, 1994, p. 58). Answers and issues are central to the ABV in structuring strategy (Ocasio, 1997). In order for strategic projects to be selected, they have to enact the answer to a pre-existing issue. Individual attention is situated in a context where only some issues are prominent. The prominence of a subset of issues (or goals) will typically be determined by top-management design of a structure of attention. As a reaction, 'when individuals and organizations fulfill identities, they follow rules or procedures they see as appropriate to the situation in which they find themselves' (March, 1994, p. 57).

Shared goals can help coordinated action inasmuch as they provide a basis for conversations among human actors (March, 2010). However, the notion that common-shared goals favour coordinated action, thus reducing the exercise of power and influence, is not invariably true (Pfeffer, 1994). On the one hand, power and influence may still exist under the presumably agreed goal of making profits, while on the other, compromise between parties may agree on means to achieve their different goals. In fact, Cyert and March (1963) argued that organizational goals were subordinate to the goals of each coalition, which rendered them meaningless. For Mintzberg (1983), however, organizational goals could be specified from the behaviour of the organization, retrospectively, and were instrumental to understand the power dynamics. This paper looks at how goals, which frame the structure of attention, are used to encourage middle managers to develop coordinated action. Specifically, it looks at how determining the process to achieve such goals gives middle managers symbolic power. Linguistic interactions are viewed in this paper as bearing the traces of the social structure that they both expresses and help to reproduce (Bourdieu, 1991). The environment will be enacted, depending on the prompts provided by the structure of attention and then the strategy process will try to develop a set of answers to those prompts.

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The next section briefly describes the research setting and methods used in this investigation of involvement as a result of top-management encouragement at Croftwell. Then, the paper presents a brief description of the story of the middle-management strategic role as it occurred at Croftwell, followed by the sketch of a theoretical process identifying ways of overcoming rigidities to foster middle-management involvement. Finally, the paper consolidates the findings by means of a discussion, followed by a conclusion.

Methods

The purpose of this paper, i.e. to develop theory on top managers' role as enablers for the strategic contribution of middle levels, suits the use of the case study method (Yin, 1994). There are three reasons for this. First, the nature of the phenomenon of strategy-making, as a multilevel and organization-wide process lends itself to fine-graining inquiry rather than quantitative measurement (Chakravarthy and Doz, 1992). Second, the use of a successful example of top management's enabling of middle managers presents a revelatory case, permitting theoretical generalization (Berg, 2004). Third, the sequence of interactions across the period studied offers a rich longitudinal evolution of middle and top manager's interaction allowing us to study how middle managers are enabled. The research question, which guided data collection, focused on identifying the enablers of middle-management involvement. First, we analysed documentary evidence identifying such enablers to then look to confirm or disconfirm their existence in subsequent documents, using the logic of theoretical sampling within (Corbin and Strauss, 2008). Next, in order to cross-check the results obtained in the documents, we scheduled targeted interviews with key members of the top-management team. These interviews added depth and breadth to the documentary findings, producing theoretical saturation, whereby all identified enablers were sufficiently developed.

This paper uses interactions as any interchange of information occurring between individual managers and/or groups of managers. Such interactions may occur within any channel of communication, such as meetings, presentations or formal communications, where managers interchange ideas. The unit of analysis is the strategy process, and this paper studies how this process changed as a consequence of involvement.

Research setting

Croftwell is a Barcelona-based insurance company, whose name has been disguised at their request. Founded in 1992, as a joint venture between a foreign and a local partner, it had already become a major player in the Spanish market by the year 2000. The idea at its creation was to tap into the opportunity of offering insurance products through the existing distribution channels of a local bank, who is one of the partners. Croftwell offers life insurance and pension schemes, both collectively and individually, directly to customers. The company is a holding which underwrites life insurance and reinsurance, including capitalization insurance and all associated preparatory and complementary activities, as well as managing and promoting collective funds which offer coverage for risks related to human life. With 700 employees, including 50 at managerial level, Croftwell had grown 7% annually in profits and 13% in customers from 1992 to 2000. The organization has been kept relatively small and has continuously fostered the process of strategy-making by encouraging middle-level ownership of strategic projects. Being part of a highly regulated industry and under ownership by a major bank, which in turn provided the distribution channel, Croftwell faced a munificent situation. This situation was considered a double-edged sword by the CEO, as the cost of short-term stability was coupled with a lack of capacity to pre-empt future threats. One way to prepare the organization was to allow middle managers to take part in strategy and, in so doing, to enact their environment. The aim of the CEO was to shift the culture from reactive to proactive.

Middle-management involvement provided the flexibility and the capacity for prompt and swift reactions and, in turn, has given Croftwell an edge over its competitors in market development, expansion and exploitation. This success is perceived by Croftwell managers to be largely due to the involvement of middle-level managers in their strategy-making process. This is the justification for using Croftwell as a revelatory case study (Yin, 1994).

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Data collection

The empirical research was conducted at Croftwell from 2002 to 2008. Data were collected mainly from internal archival company documents. This was complemented with five targeted interviews, which served as verification, as well as one five-hour focus group used to contrast views from Croftwell's managers. Details for each source of data are shown in Table 1.

The archival documents describe the practices or tools of interactions between the different actors involved: top management and middle managers from 1999 to 2008. Examples of such documents are the presentations and documents describing how middle managers were encouraged to take an active role and, in turn, the presentations where middle managers specify their rationale and the specific actions that changing their role would entail. Rationale, as used here, is the explanation given by participants of why specific events occurred or could have occurred. In other words, rationale is the underpinning logic causing events, as presented by middle and top managers. Although such explanations may reflect their individual cognition, participants' explanations were observed. Such explanations of events, within this research, provided the most objective report of the data, allowing subsequent efforts to explain the data as suggested by Seale (1999, p. 89). Rationales are similar to schemata as used, for instance, by Balogun and Johnson, (2004), but rather than emphasizing the interpretative framework of participants, rationales are used to emphasize the reasons driving middle managers to get involved in strategy. In addition, the study used internal reports of the whole process, articles that appeared in the specialized

Table 1. Three sources of data

A: 23 Archival documents[a]	
Description	Obtained from
1. Annual Reports (2001–2006) (6 units)	Top management
2. Specialized press report on Croftwell's strategy 2002 (10 pp.)	Spanish press
3. Corporate Governance Reports (2004–2007) (4 units)	Top management
4. Specialized Press report on Croftwell's 10th anniversary 2002 (5 pp.)	Spanish press
5. Presentation for internal stakeholders in 2002 (30 slides by middle managers)	Middle management
6. Presentation for external and internal stakeholders 2003 (50 slides by top management)	Top management
7. Presentation for external stakeholders 2004 (49 slides by top management)	Top management
8. Presentation for internal stakeholders in 2004 (40 slides by middle managers)	Middle management
9. Presentation for external stakeholders 2005 (54 slides by top management)	Top management
10. Specialized press report on Croftwell's induction to the BSC Hall of Fame 2006 (5 pp.)	European press
11. Presentation for external and internal stakeholders on success of Strategy Process 2006 (26 slides by top management)	Top management
12. Specialized press report on balance scorecard and coordination (2006, 10 pp.)	Middle management
13. Making Strategy Execution Everyone's Core Competency (by the CEO 2006, 24 slides)	Top management
14. Presentation for external stakeholders on the strategy process 2001–2006 (In 2008, 52 slides by top management)	Top management
15. Specialized press report on Croftwell's change 2001–2006 (10 pp.)	Top management
B: 5 Targeted interviews	
1. Chief Strategy Officer in 2008	
2. Chief Strategy Officer in 2004	
3. Deputy CEO in 2004	
4. Chief Strategy Officer in 2003	
5. Human Resources Manager in 2003	
C: 1 Focus group	
Theme: How to involve middle managers in the strategy process: 11 Participants from 6 equivalent organizations including 2 from Croftwell. (5 hours in Nov 2003, 50 pp. transcript)	

[a]Archival documents are referred to as Arch. data throughout this paper, using the number assigned in this list to identify the source of data. Archival documents 1 and 3 contain 6 and 4 units, respectively, making the total number of units of Archival documents 23. Archival documents 1 and 3 have been consolidated in this list to avoid repetition.

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Table 2. Description of the six participating organizations

Organization	Main industry	Competitive context	Strategy process participants (% total managers)[a]
Croftwell	Insurance	16% profit increase over last decade	50 (86.0)
Ness	Consulting and engineering	Sustained growth for last five years	80 (87.5)
Inver	Technology IT (subsidiary)	Highly competitive but still growing	80 (60.0)
Steel	Steel manufacturing	Industry leader	120 (50.0)
North	Oil refinery (subsidiary)	Stable and sustained growth	30 (66.7)
High road	Mobility-related services	25% turnover increase for the last 5 years	100 (80.0)

[a]50 (86.0%) means 50 persons, which comprised 86% of all managers in the organization.

press and presentations made to external stakeholders by top management (see Table 1). As a whole, this set of documents constitutes the means for starting or enabling engagement/interactions between the top and middle managers

As a complement to these archival data, five targeted in-depth interviews were carried out with members of top management, including three with the chief strategy officer, who acted as change agent, the deputy CEO and the human resource managers. These managers worked at Croftwell throughout the period studied and had at least five years' tenure. The main focus when asking questions was on how middle-level involvement was organized and how these managers were encouraged to take an active role in developing strategy and strategic projects. To strengthen internal validity this focus was maintained across interviews and throughout the focus group, using a case study protocol as a set of common themes (Yin, 1994). Interviews lasted 90 minutes on average, and all were recorded and transcribed immediately after they were carried out. The six organizations that took part in the focus group shared their participative approach to strategy-making, ranging from 50% to 87.5% of managers. The participants were managers responsible for the strategy process in each organization. This structure provided homogeneity of participants (Lee, 1999). Moreover, such participants belonged to a variety of industries to gauge the degree to which Croftwell's approach was context dependent (Berg, 2004). The focus group was carried out in November 2003, about halfway through data collection, to allow for both: new questions and themes for subsequent data collection, as well as clarification of ambiguous or poorly understood information (Lee, 1999). A brief description of the organizations that participated and their context is presented in Table 2. The interview protocol that guided the conversation and contains the themes discussed in the focus group and the interviews is presented in Table 3.

Table 3. Interview protocol

Explain the background of the research
Details of the person (s) (name, position, tenure, unit)
Themes:
- Frequency in developing a strategic exercise?
- What are the interactions amongst managers?
- How top management interact with middle managers?
- What outputs are obtained?
- How has the strategy process evolved?
- Which are the main difficulties encountered?
- How is strategy revised when needed?
- What is the degree of participation at different levels?
- What is the significance of participation in the strategy process?
- How are projects and initiatives generated?
- What is the influence of top-down versus bottom- up?
- Which is the degree of satisfaction with the present process with respect to:

Data analysis

This diverse set of data was consolidated into a profile describing the process of strategy-making used at Croftwell and the way in which middle levels had been enabled to get involved throughout the years of study. Using the process profiles with a narrative logic to theorize (Langley, 1999), the analyses were able to construct, retrospectively, a coherent picture of events and their significance. This enabled us to connect this unfolding picture of strategic involvement to the sources of data obtained (Berg, 2004; Lee, 1999; Yin, 1994). The analyses pursued authentication of the written case profile for reliability. For that purpose, the document was submitted to two of the interviewees for member checks (Stake, 1995)

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on chronological accuracy, inferential accuracy and comprehensiveness in covering the most important events. These two informants read, revised and validated the narrative independently. After minor modifications, the case in narrative form was deemed an accurate description of the change in the strategy-making process that occurred in Croftwell from 1999 to 2006. The essence of this narrative profile is the rich description presented in the next section of this paper.

Though the narrative approach is useful for communicating the richness of the context to the reader, in order to develop theory, this paper also uses a bracketing approach (Langley, 1999). Bracketing was chosen because temporal decomposition allowed for the analyses' multidirectional causality between managers' interactions and the attention structure. To unveil the underlying theoretical skeleton that is derived from the story at Croftwell, data segments from archival data and records of interviews were organized into a sequential timeline matrix (Miles and Huberman, 1994). Using the order of the previously validated case narrative, the analyses classified each key event extracted from the archival into one of three time periods, namely: 1999–2001, Offering a Challenge; 2002–2004, II Getting Ready; and 2005–2006, III All Set. Successive iterations in classifying evidence, while cross-checking with interviews and other units of archival data, produced a matrix. A summarized version of this matrix is presented in Table 4, where the key interaction events in the story are shown. To enhance the validity of the qualitative analysis, two researchers independently analysed the archival data and interview records to plot the changes in involvement and entitlement over time, noting the key events and processes at each stage (Miles and Huberman, 1994). Using this diagrammatic representation, the processes of encouragement to take a stronger part in the strategy process and the key events that explained it, became apparent. In addition, this format allowed the analyses of the relative balance between opposing forces (Van de Ven, 1992) that would be expected in the dialectical relationship between top and middle management. It is possible to see, in the development of this story, how the rationale of top management affected and also was affected by the rationale of middle managers across different channels of communication.

These interlocking rationales occurred under special circumstances where top management triggered renewal. Probably because of the importance of recognizing risks in the insurance industry, the CEO realized that operating as the insurance company of a well-known bank was too comfortable, hampering the competiveness of the organization. He launched the strategic priority of developing middle managers as strategic agents as a way to build up competitiveness, which could be interpreted as top-management-driven change (Volberda, Baden-Fuller and Bosch, 2001), but the very change was to be designed and carried out by middle managers, which could be seen as transformational change (Volberda, Baden-Fuller and Bosch, 2001). This internal organizational context where a hybrid of top-down and bottom-up renewal effort occurred was instrumental to the top-driven change that took place. A synthesis of these interactions and how they evolved into converging rationales appears in Table 5.

In order to verify and validate the interpretation of these findings, the analyses used the data gathered in the focus group. The five-hour-long focus group brought together 11 top managers from six companies which had attempted involvement of middle managers in their respective organizations. Two organizations, including Croftwell, claimed satisfaction with the process they had followed; two reported the need for improvement in their approach; and two described their experience as a failure. It is important to mention that the two satisfied organizations had gone through an internal process to increase their competiveness, while the other four organizations just went through the phase of strategic planning with no major reflection. By comparing the arguments used by the six, it was possible to identify the critical elements used in theoretical development. It became evident that middle-management involvement, driven by top management, made sense as part of a major renewal effort and not as part of business as usual. For instance, while analysing only Croftwell's data, the reward system element seemed to play a key role, but a similar system had been used by all five other companies without such weight. Hence, though necessary as a condition, the reward system was not considered sufficient, which is consistent with extant research (Marginson, 2002). Conversely, through this comparative

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Table 4. Timeline matrix for change of strategy process roles at croftwell (interaction events across channels)

Channel	Period					
	2000–2001		2002–2004		2005–2006	
	Key events I. Operational effectiveness	Shift in attention structure Examples	Key events II. Invitation coupled with self-confidence	Examples	Key events III. Interlocking rationales	Examples
Within TMT	CEO's intention to change middle managers role in TMT board meeting	CEO persuades the TMT of the importance of involving more managers in strategy-making (Interview)	Most part of TMT's former decision-making role is transferred	'Now we have to assist middle managers to make decisions' (Interview)	TMT role is maintaining the validity of the attention structure	'Our job is now to overlook the whole system'(Interview)
Formal Goal setting	Coordination and measurement of goal achievement	Agreed adoption of a formal administrative system (Arch. data 5)	Middle Management encouraged to develop their own projects	Project development need middle managers' knowledge development, involvement and improvement (Arch. data 8)	Yearly simple open ended guidelines are put forward by top management	Broad strategic guidelines outlined by top management and middle management respond with specific goals and projects (Arch. data 9)
Skill development	Measure extent of role change	Increased time devoted to leading activities from 35% to 60% (Arch. data 8)	Re-skilling of middle managers to develop new competencies and capabilities to fulfill new role	Training programme delivered by human resources unit. Middle managers learn leadership and management skills (Arch. data 8)	Strategy-making becomes a continuous recursive process.	Regular revision of goal achievement and negotiation of new goals to encourage learning (Arch. data 13)
Processual driven by middle managers (role project)	Establish regular planning and revision exercises Increasing involvement and communication of middle managers in strategy setting	Monthly review meetings to keep track and coordinate Establishment of unit objectives by middle managers negotiated with TMT efforts across units (Arch. data 8)	Increasing awareness of external world and environmental business issues	Ad hoc training and regular seminars with industry experts (Arch. data 8)	Unit goals and middle managers' projects shape the strategy of the firm	Middle managers propose their unit goals develop projects and review results and contribution (Arch. data 14)
Processual driven by TMT	The aim is to develop and enable middle managers to have a proactive role	Middle managers are asked to reflect on their current and potential role (Arch. data 7)	Development of leadership skills and involvement in decision-making	Middle management training programme and administrative system used as a tool to encourage involvement (Arch. data 9)	Middle management's aim is to develop relationships of cooperation and openness across units	Reward system is team-developed comprising: individual, unit and firm levels (Arch. data 13)

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Table 5. Rationales and interactions before and after

Top management's rationale	Middle management's rationale	Types of interactions
Examples (sources of data)	Examples (sources of data)	
I. Operational effectiveness		
Everything was going well 'Corporate results have grown constantly for ten years since 1992 at a yearly rate of 16%.'(Arch. data 4)	Engaged and hard-working 'Appropriate strategies, skilled management and disciplined operations have driven us to the top of the insurance rankings.' (Arch. data 8)	Limited and sparse Plenary sessions held once a year
	SHIFT IN ATTENTION STRUCTURE	
II. Invitation coupled with self-confidence		
Open ended and engaging offer 'If you want proper managers then do not give up on their directing capabilities. And not giving up means top down and bottom up communication, getting rid of the arrogance of thinking that only your ideas should count' (Focus Group, Chief Strategy Officer) 'The Balanced Scorecard opens the road for knowledge transfer making coordination easier and helping the middle line in their decision-making process.' (Arch. data 1)	Challenged but taking action in response 'Our staff is very committed and highly trained. This explains why the average productivity in terms of managed funds per employee continued to grow, going from 44 million Euros in 2001 to 58 millions in 2002. The challenge now is to leverage this world class skills creating new projects'(Arch. data 1) 'People who manage claims have to be on the same page with sales, market developments and market standards.' (Arch. data 12)	Formal and complementary Invitation to reflect on the role of the Middle line Acceptance of the challenge Presentation encouraging middle managers to carry out the 'Role Project' Project presentations carried out by middle managers in front of top managers as project champion Goal-setting meeting within unit managers Regular results review meetings
III. Interlocking rationales		
Acknowledge change in roles 'Croftwell, one of Spain's largest Insurance companies, focuses its efforts on translating and deploying the corporate strategy into every corner of the organization to drive business results. This has enabled the all key employees to be champions, which has provided tangible business benefits.' (CEO in Arch. data 13) 'The easiest thing is to kill the passion for strategy. You do it by doing the same each year. To keep passion alive each manager has to see him or herself as a project being continuously developed and with self developed challenging goals' (Focus Group Chief Strategy Officer)	Accept and value change in roles 'Each unit's team decides on their goals and action plans. These goals and plans establish the direct relationship of each employee and each unit with the company's strategy and philosophy. As each one feels part of it they are on top of the strategy development.' (Arch. data 12) 'Our goal throughout this process has been to change from disorganized managers to effective managers by organizing ourselves and the rest of the team' (Arch. data 8)	Regular, both formal and informal Project presentations carried out by middle managers in front of top managers Regular revision and follow up meetings between top and middle managers Presentations by middle managers on they have enacted their new role Continuous electronic interface between middle line and TMT

analysis, it became evident that it was the escalating mutual agreements, which achieved interlocking rationales, that explained Croftwell's successful involvement of middle managers. Unless accepted by middle managers, top managers' attempts alone would not have worked, and would probably have turned into polemic rationales. One important tool used by top management to make the middles 'buy in' was to use the metaphor of the cathedral builders.

Process of change in the attention structure

Symbolic trigger

At Croftwell, as an illustration of their scheme, the deputy CEO narrated the story of the various tasks and perceptions involving mediaeval workers when building a cathedral. During the construction of a cathedral, when asked what their work was, the quarry workers and the stone

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masons would answer that they were chiselling stones. In contrast, the workers who built the scaffolding would answer that they were building cathedrals, even if their work vanished when the building was over. This situation was made comparable to the preoccupations and contributions of middle managers in the process of strategy-making. The use of the symbol – involving them as 'scaffolding workers' – invited them to see the larger picture and to take on power to shape the strategic direction. In return to the power concession, top management would gain a much fitter organization. In fact, the deputy CEO commented that, by promoting intimate involvement, participation and ownership of the strategy-making process, Croftwell were looking to their 'chisellers of stone' to become more aware of how their individual efforts dovetailed with the eventual grand design of the cathedral. Top management persuaded the middle line that, through their becoming more sensitive and alert, there would be a much better integration and alignment of the strategic effort. To that purpose, mere involvement from middle managers was not enough: it had to transform perceptual awareness and mind-sets on both sides and dramatically change the way they collectively pursued individual objectives. However, middle-management attention structure had been redirected by the use of a strong symbol.

Perhaps as important was the external legitimacy that the cathedrals metaphor gave to the shift in attention structure. Likening management to a cathedral building is widely used in popular literature on managing and motivation (e.g. Drucker, 1954). In the case of Croftwell, the use of a popular metaphor was a skilful attempt at using the external legitimacy of the metaphor in order to foster a new vision of middle managers' role in the strategic process using a logic of appropriateness. This logic is a fundamental form of political action, whose sensibility derives from the obligations that actors enact in their day-by-day life situations (March and Olsen, 1989). Logic of appropriateness is one by which 'actions are matched to situations by means of rules organized into identities' (March, 1994, p. 57). In Croftwell's case, top managers were able to cause middle managers to think in categories of identities, situations and social norms attached to identities. Middle management ended convinced *ex post* of the logic of appropriateness that is partly triggered by the integrative aspect of the cathedral metaphor. Confirming the importance of external legitimacy of their strategic renewal attempts in 2007, Croftwell was inducted into the Hall of Fame Europe, where only a few other firms appear (Table 1, Arch. data 3 and 10).

Change in the format of the strategy process

Back in 1999, Croftwell set off three interrelated processes. First, they restructured their strategy process as a result of top management's concern that the lower levels of the organization did not share the company's strategy. Typically, top management would have met every year to devise and revise the medium- and long-term objectives of the company. However, in 1999 for the first time, top management invited each member of the middle line to propose his/hers unit's goals and projects. Before submitting their proposals to top management, they were first initiated into the overall vision of the corporation.

This redesign of the strategy process changed the positions of middle managers, it gave them a new identity as a distinctive category, and it reordered the interdependencies within the middle line and with top management. All these events established a new basis of power and responsibility, whereby middle managers were charged with a more substantial strategic role. The resulting corporate strategy was synthesized into 20 corporate goals with the character of an umbrella, within which, middle managers proposed their projects. Presentations of projects were a formal instance of interaction between the middle line forming one unit and the upper echelon forming the other. The criteria to select projects were their feasibility and profitability, and the overall fit with the organizational effort. Considering these criteria, selection of projects was done on agreement of middle and top management. This formal interaction between top- and middle-level management forced all individuals involved to look cross-functionally instead of only at the individual functional units.

As a result, the middle line took ownership of unit goals and projects, as they enacted the competitive environment. Thereafter, the invitation was extended every year, with an enhanced response from middle managers every time. Interdependencies became useful for middle managers,

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and they felt integrated into the political system. In the words of the chief strategy officer:

> There is no point in asking what one should do when each one already knows what the whole company has to do, then it's just a matter of going ahead and figuring out what each one has to do to contribute to it.' (Int. 3)

Organizing coordination and encouraging action

Second and in parallel, the use of a widely accepted administrative system was adopted to monitor the strategic progress. This was to bridge the 'gap' between top management's priorities and the middle line's everyday concerns. The administrative system supported the new structure of attention by making middle managers aware of the issues that were relevant to top management and encouraging them to find the answers to such issues. The system was thus considered as one available tool to tie up unit goals and company goals through the coherence and integration it provides between them. The administrative system shocked the middle line's status quo, and its language became the mechanism that reproduce the new social structure (Bourdieu, 1991). In turn, the formal encouragement by the top to the middle to use more time in strategic matters than everyday operations gave middle managers new symbolic power. The whole issue of supporting coordination was explained by the chief strategy officer in the following quote:

> We did not just fall in love with any administrative system, but we saw that within its framework, each middle manager was concerned with his or her own objectives. The objective had not changed but they could see that there were other objectives to be accomplished in parallel. If a manager was just concerned with paying claims, now they know that claims are only one chunk and they must care about the whole. (Int. 4)

The firm's approach to the administrative system as a tool that integrated Croftwell's different activities across units rather than as a fix for all was helpful to develop renewal. The system reinforced the new power and responsibilities of middle managers, helping to institutionalize the new attention structure.

Nevertheless, this major renewal effort was not only internal. Perhaps more importantly, it was meant to persuade external stakeholders – mostly competitors – that the company was getting fitter. One way to substantiate this claim is in the number of documents aimed externally to inform of the internal process carried out and of the success achieved. Most external documents portray the notion of a renewed middle line that is carrying out a strategic effort, which in turn highlight the success of the CEO.

Culture-changing project

Third, Croftwell launched what they interpreted as an internal culture-changing project. Its name was 'The Role Project' and it was carried out between 2001 and 2005. It consisted of an invitation made to the whole group of middle managers, comprising 45 persons, to redesign their role within the context of organizational priorities. The idea was for them to reflect on what their role was and what it ought to be. The project would be considered successful when a self-organized middle line was able to come out with a viable proposal to redefine their roles in such a way as to integrate their operational concerns with their strategic concerns. Then, middle managers crafted their own role. Given the shift in attention, middle managers enacted how to implement their new role. In all, Croftwell's structure of attention, their culture, rules, formal structure and political leadership suffered a major transformation of how strategy was formulated and implemented.

This new role, as proposed by the middle managers, was constructed around four major themes that enacted the new role: (a) coaching and mentoring; (b) managing by processes as well as by objectives; (c) developing individual qualities for decision-making; and (d) developing teamwork. These four themes established interdependencies between middle managers and, in turn, helped to improve middle management's reputation with top management and the rest of the organization. The first phase lasted for more than a year. Groups of middle managers regularly met and brainstormed ideas. The questions they asked included: Why should our role evolve? What is our mission? What should we work at? How do we redefine our goals? How do we implement our new role? The inherent value of the challenge was the essence of this idea:

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Table 6. Resulting action points[a]

Action point	Description
Skills training in leadership was proposed	For this purpose a 12-month scheme involving formal training in leadership skills was designed to help middle managers in the leading and evaluation of subordinates
Direct involvement in the strategic planning process was initiated	Using the administrative system as a frame, middle managers engaged in actively defining the objectives of each business unit, and studiously aligning these to corporate goals
Communications	Using Lotus Notes, a network of communications was established. A more efficient web-based knowledge management and communication system was developed and adopted
Time management	Time-management techniques were introduced to ensure more effective conduct of meetings and work schedules
Control System	A management control system for monitoring operational processes was installed
Integration	Coordination and integration of operational activities was actively pursued

[a]*Source*: Arch. data 6.

> We change everyone's role with the 'Role Project' radically. If we had done just a cosmetic change we would have ruined it all. (Int. 5)

The unit-level managers defined their essential work as comprising the exhibition of leadership and managing local projects through pre-specified objectives. In line with this redefinition of their goal, they changed the proportion of managerial functions from 35% of their time to 65% of their time, so that managerial responsibility became a key component of their task. Finally, these reflections would give rise to seven action points, which helped in implementing their redefined roles, as described in Table 6.

All these action points taken together were sanctioned and praised by top management in 2005, positively assessing middle-management performance and increasing their power base. As time went by and the middle line perceived that their proposals were valued, they started working on making each of the action points a reality. As explained by the deputy CEO:

> . . . when it comes to issues like price, product, costs even IT, before it felt as if we were all deaf to one other. Each one had its own budgeted objectives and would approach the rest thinking or even saying: 'just deal with it'. Now each one says: if you do not give me this, then I won't be able to get that. (Int. 3)

Three key issues fostered enthusiasm within the middle line to carry out the project role successfully: participating in generating projects that would form part of the strategy; engaging in viewing the whole picture through the administrative system; and the variable salary scheme. However, more important than the individual middle manager's salary was that each member of the middle level could, in turn, decide the variable component of their unit's team members. Yet, this did not seem to be enough to explain the change at Croftwell, where the culture was changed owing to a mix of efforts carried out together. What Croftwell managed to achieve was to shift up strategic responsibilities through the hierarchy. While the old roles sufficed for their operational efficiency; the new roles were instrumental in achieving the fitness required to compete. Performance, reputation and power spiralled together, increasing the value of the position of middle managers.

Looking at the strategy process from the viewpoint of the top management, corporate transformation and strategic renewal may seem to be an intricate web of interdependencies. This case clarifies this transformation process, presenting how middle managers were successfully invited – by a change in the attention structure – to shape and execute strategy. More specifically in Croftwell, the challenge of successful strategizing did not lie in producing grand five-year plans, but in developing coordination, giving power and generating responsibility. In order to present this process systematically, the next section describes an inductively derived process model.

A process model for developing interlocking rationales

The process model presented in Figure 1 is the end result of the theory-building process. The model shows that middle-management involvement can be encouraged by top management as the rationales between top and middle interconnect. Involvement was initiated by top management as an invitation, which was followed by middle manager's acceptance and willingness to put the effort

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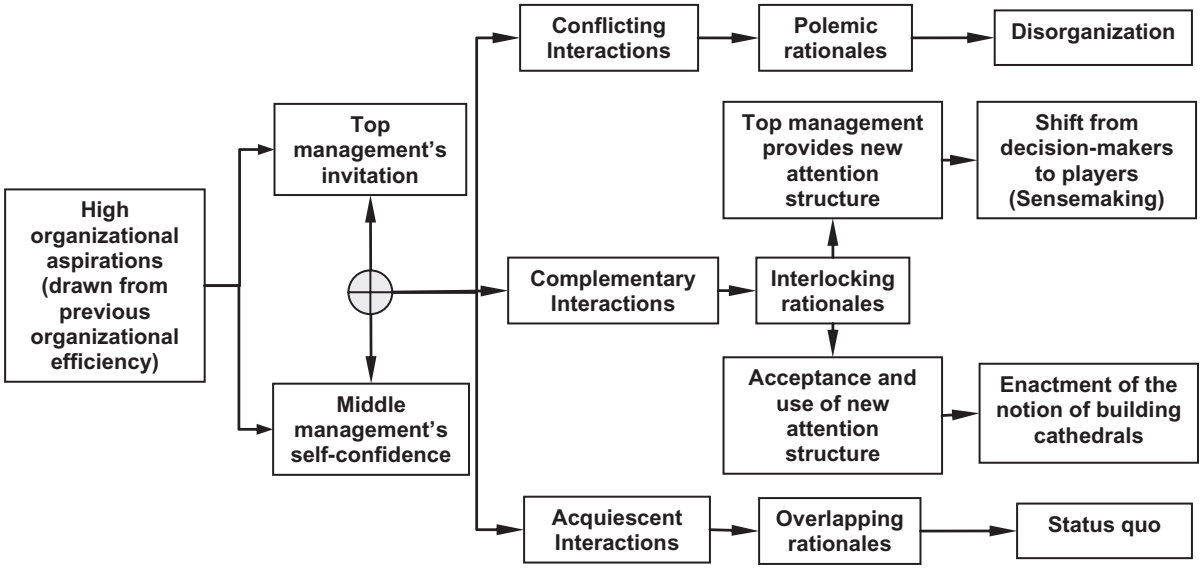

Figure 1. Process model for developing interlocking rationales

into developing such involvement. In the model, such initiation is conceptualized as a new attention structure provided by top management. This invitation is followed by middle management acceptance and ultimate enactment of the new attention structure. The relationship between top and middle management was such that proposals of one group were completed by the proposals of the other throughout the establishment of the new attention structure. The attention structure is the set of issues and answers that are given priority (Ocasio and Joseph, 2005). This iteration generated an interlocking process. This interlocking nature suggested a dialectical theory of process, where different patterns may converge oscillate or diverge (Van de Ven, 1992). The degree of convergence between the sequences of proposals will determine the degree of involvement on which middle managers embark. In the spirit of the ABV, the restructuring of the attention structure was initiated by top management and followed by middle management's further development of this structure to permit them to take part in decision-making. Thus, in the model, middle managers act as contributors who enact the shift in attention structure as they negotiate it and craft it together with top management.

The rationales for carrying out this involvement initiative given by both top and middle managers, rather than being similar, were complementary. This complementarity was built via successive interactions, where each group took a step further to accomplish the desired involvement. One example of such complementarity was the face-to-face exercise with each of the 25 middle managers, where their objectives were established. The question asked by top management was 'What is your ambition?' The subsequent discussion aimed to bring together the ambition expressed and the interest of the organization as a whole by determining the tools needed and specific actions to be deployed by both parties in the next three years. Far from a unilateral set of targets, it was a common exercise in helping the middle manager achieve his or her ambition. Also the cultural change, where the new role was constructed, operated in subsequent iteration of interlocking rationales. Initiated by the announcement of the new role, which gave new powers and responsibilities to the middle line, the process followed a succession of stages where middle managers improved performance and reputation and increased power, and top management approved and agreed, because they could see that the construction of the new role put the whole organization in a much better competitive position.

In the model, the extent to which top and middle management's rationales converge as the attention structure is mutually crafted, determines how they interlock. The degree of middle-management involvement achieved by the organization in its strategizing activity is the observed

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outcome. Once the attention structure is constructed, issues raised mostly by top management are coupled with answers, mostly developed by middle managers. For middle managers, the redefinition of their roles, goal setting and developing new skills are examples of how they enacted the new attention structure and became cathedral builders.

The model in the figure has three broad stages. The first stage is the degree of operational efficiency achieved though the organization's capabilities, as widely recognized in the strategy literature (Teece, Pisano and Shuen, 1997). As operational efficiency reinforces organization achievement, it tends to increase aspirations. The initial rationale at Croftwell was 'We've been doing so well these past years, how can we do better the next ten years?'; their answer was to increase strategic involvement (see Table 5). Involvement was viewed as allowing for the expansion of the number of managers that take strategic responsibilities. Operational efficiency is a necessary condition to generate credible aspirations that require a subsequent restructuring of the attention structure. As described by a specialized press article:

> Since its inception, Croftwell has kept a strategy of organic growth. This has been achieved through the constant development of innovative products and by tapping into their shared distribution channels. Increase in number of products as in volume now allows them to look into a new future. (Arch. data 4)

The second stage of the model is the relationship between an invitation by top management to middle managers to take a more strategic role and the middle-management acceptance of this invitation and self-confidence that they could rise to the challenge. By invitation coupled with self-confidence, this paper means the sequence of interaction between top and middle managers where involvement is discussed and built up (see Table 5). Overall, the interaction between top-management initiation and middle-management development has the potential to shift and enhance the attention structure. Instrumental was the role-changing project carried out by the very middle managers, a training programme to elicit leadership capabilities and a brand new variable reward system. As shown in Tables 2 and 3, the virtuous cycle relationship established by top and middle managers was what made involvement possible and allowed it to develop further.

In the case of Croftwell, establishing the goal of shifting middle-management behaviour to be more strategic, played a major part in the organizational transformation. This move operated by setting the terms of the discussion which influenced organizational behaviour (Pfeffer, 1994). This goal had a behavioural nature that required a shift in both middle and top management. Moreover, the specific details of this shift were left unspecified for middle managers to develop and design their role. This generated significant power and influence interactions within middle management but, at the same time, the fact that this design had to be presented to top management for approval created a common purpose for middle management acting as a coalition. The behavioural nature of the organizational goal coupled with division of labour in designing the specific details accounted for circumscribed and channelled exercise of power and influence, allowing for coordinated action. In addition, the changing frame of reference faced middle managers with a challenge whereby they either engaged with innovation or lost their power base (Pfeffer, 1994).

The mutual restructuring and enhancing of the attention structure is what fosters the involvement of middle managers. The invite–accept mechanism occurs in a recursive fashion whereby, as the invitation is accepted, an action is taken accordingly by both to reinforce mutual commitments, which in turn triggers subsequent invitations. Through successive and complementary interactions, this recursive mechanism achieves an optimal level when each group, middle and top managers, keeps its autonomy as well as their ability to contribute to one another and to the organization as a whole. Interlocking rationales explain how they contribute to this partnership, as it underpins the very existence of such optimal level. The concept can be illustrated with the role project explained above, which changed the culture to one where middle managers became strategic actors.

The third stage describes the three possible outcomes. Under interlocking rationales, each group complements what the other can offer, but rationales may not interlock. Too great an empathy may cause groupthink (Janis, 1972), and too

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great a divergence may make middle-management involvement impossible (Floyd and Wooldridge, 2000). When interactions are of the type where no common ground is found between the rationales of middle and top management, it can be called conflicting interaction, and the outcome will inevitably be polemic rationales. Conversely, where interactions do not comprise any degree of debate, they can be characterized by being acquiescent interactions. There will tend to be an overlap between top and middle management in the resulting rationales. In either case, any attempt to shift the attention structure by top management will not reach fruition.

Discussion

This paper explains one way in which top management can produce involvement of middle managers in the strategy-making process. When strategic renewal is a top management's recognized immediate strategic priority for the future survival of the organization, enabling middle managers becomes crucial. This paper complements that of Brauer (2009) by addressing internal and external context elements. In so doing, it identifies that the process of encouraging involvement operates through the change in middle management's role, which allows them to enact the environment while top management exercises symbolic organizing (March, 2010; Smircich and Stubbart, 1985; Weick, 1995). The main concept developed here is the concept of interlocking rationales, which explains what brings top and middle management together as they carry out a coordinated activity system (Spender, 1995). The notion of interlocking rationales is important to achieve coordination via strategic planning (Mintzberg, 1994b), and it is one way to produce participative learning (Shrivastava and Grant, 1985). As such, interlocking rationales further develops the idea of integration through strategic planning (Jarzabkowski and Balogun, 2009), helps understanding of how to harness the potential of middle managers (Balogun, 2003), and answers the call for fine-grained studies in the dynamics of the strategic processes (Wooldridge, Schmid and Floyd, 2008).

The concept of interlocking rationales contributes to the ABV (Ocasio, 1997; Ocasio and Joseph, 2005), as it offers one possible outcome of a shift in the attention structure. While the ABV main mechanism is the relationship between issues and answers, the notion of rationales adds to the selection of issues. Achieving interlocking rationales would then explain why different organizational members, i.e. middle and top managers, identify similar issues as important, which is desirable under top-driven change. This concept extends the idea of dissemination of meaning (Turnbull, 2001) as a way to focus middle's attention. Under the presence of interdependencies, no single actor can control the desired outcomes (Pfeffer and Salanzik, 1978), but interlocking rationales can guide behaviour in becoming the type of governance that, according to March and Olsen (1989, p. 94), resembles gardening more than hunting or engineering. One of the reasons why this type of governance occurs is because the positional change required for renewal, though created by top management, is left to be implemented by the middle line. In doing so, the enactment of the position of middle manager develops the virtuous circle of position, reputation and performance (Pfeffer, 1992, p. 76), whereby potential power becomes actual influence (Pettigrew and McNulty, 1995). This concept adds to the change path, which Stensaker and Langley call 'confronting resistance and negotiating early on' (Stensaker and Langley, 2010, p. 26). In turn, the absence of such co-creation of the new role and the enacted implementation carried out by middle managers explain how empowerment, as the link between encouragement and middle-management involvement (Labianca, Gray and Brass, 2000; Mantere, 2008; Spreitzer, 1995), can be constructed and maintained. In fact, by recognizing that self-interest behaviour and scepticism are an unavoidable element (Pfeffer, 1994) in the top- and middle-management relationship, this paper brings to the surface how power and influence are at the core of interlocking rationales.

This paper contributes to the middle-management literature (i.e. Balogun, 2003; Jarzabkowski and Balogun, 2009; Wooldridge, Schmid and Floyd, 2008) by unravelling the symbolic power of top management and stating it as an endogenous element rather than as external to the problem of involvement. The endogenous concept of interlocking rationales applies to top-driven change, and it makes evident the role of top managers as enablers of middle managers.

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Conclusion

The capacity of an organization to capitalize on its middle managers' strategizing capabilities will depend on the extent to which the latter are included in the strategy-making process right from the start. As seen at Croftwell, inclusion involves a complex mix of several social measures and strategic project developments employed collectively to great effect. The present paper has illustrated how, when change is led from the top, the direct involvement of middle managers is instrumental in enabling the strengthening of the link between shift in attention structure and resulting enactment.

Though all known precautions have been taken, this paper is not free from limitations. While single case studies offer a rich understanding that can help us develop theory, they do not provide unequivocal generalizable results. More studies could complement this one, either by studying other cases or by developing studies in bigger samples. In addition, the study is from a Spanish company, but certainly further studies in other contexts would help us better understand the intricacies of middle-management involvement. Beyond its limitations, however, this paper has addressed how top managers can facilitate the involvement of middle managers. This involvement, characterized by a shift in attention structure, seems to help in making strategy happen, which is a major concern for any practising manager. This paper has shed light on how a shift in the attention structure is top management's job as much as it is middle management's job. Therefore, a successful shift in attention structure in organizations depends on keeping a two-way street open between top and middle managers.

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