



Getting heard? How employees learn to gain senior management attention in inclusive strategy processes

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Abstract

Research Summary: Recent trends toward inclusive strategy processes raise the issue of how employees acquire the discursive competence necessary to gain senior management attention. Building on the emergent dynamic attention-based view's (DABV) emphasis on communicative interaction, we ethnographically track an inclusive strategy process in a large insurance company. We find that employees typically failed to gain CEO attention because they lacked the discursive competence to integrate their operational knowledge with the CEO's corporate themes. Employees acquired this competence by both experiential and vicarious learning. The CEO promoted employee learning more effectively by specific coaching than by generic coaching. We contribute primarily to the DABV by showing how interactions are sites for learning as well as communications and that communication channels can be both expandable and transparent.

Managerial Summary: The benefits of increased employee inclusion in strategy processes depend upon participants being truly heard. This study of an inclusive strategy process in a large insurance company

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shows that top management attention to employee contributions cannot be assumed. Employees often fail to pitch ideas in a manner that top managers can work with. Employees learn to pitch ideas effectively both by receiving direct feedback from top management and by observing feedback on other employees' contributions. Top managers must also learn how to coach effectively, engaging with the specifics of employees' contributions rather than offering general advice. Designs for new inclusive strategy processes should include opportunities for top managers to improve their coaching and for employees to learn from both direct feedback and indirect observation.

KEY WORDS

attention quality, discursive competence, dynamic attention based view (DABV), learning, open strategy

1 | INTRODUCTION

Many contemporary organizations are experimenting with more inclusive forms of strategizing, with greater participation in the strategy process from organizational employees at all hierarchical levels (Langenmayr et al., 2024; Seidl et al., 2019; Stadler et al., 2021; Whittington, 2019). IBM, Volkswagen, Siemens and Starbucks have all recently included large groups of employees in various strategy fora, either by crowdsourcing ideas or by co-creating strategies with them. In principle, increased employee inclusion allows senior managers to access a wider range of ideas and to design strategies more suitable for implementation (Dobusch et al., 2019; Stadler et al., 2021).

However, these benefits of inclusion depend upon participants being truly heard within the strategy process. If participants do not manage to gain senior management attention, inclusion will fail to harvest the wide range of ideas purportedly sought (Brielmaier & Friesl, 2021). Attention involves “the noticing, encoding, interpreting, and focusing of time and effort” (Ocasio, 1997, p. 189). Just because employees are included in communication channels with senior management does not guarantee that employees' ideas receive the necessary “quality of attention” (Ocasio et al., 2023, p. 107). Senior management might not be able to encode and interpret the potential strategic relevance of employees' ideas that are based on highly contextualized knowledge or framed in an operational discourse unfamiliar to senior management (Ocasio et al., 2023; Rerup & Zbaracki, 2021). Accordingly, employees' ideas may go unnoticed (Nicolini & Mengis, 2023), or fail to acquire the attentional focus required for making sense of employees' ideas (Brielmaier & Friesl, 2023; Ocasio et al., 2023). Without attention, employee inclusion has no impact on strategic decisions.



The recent dynamic attention-based view (DABV) has emphasized how attention depends not just on the presence of communication channels but on the nature of the communicative interactions that occur within them (Laamanen, 2019; Ocasio et al., 2018; Ocasio et al., 2023; Plotnikova et al., 2023; Vaara & Fritsch, 2022). From this perspective, employees need to be able to communicate their ideas in ways that trigger senior management attention (Ocasio et al., 2023; Brielmair & Friesl, 2023). Getting heard therefore requires “discursive competence,” defined as “the ability to craft and share a message that is meaningful, engaging, and compelling” (Rouleau & Balogun, 2011, p. 964). This is not easy. Conventional strategy discourse often appears mysterious to those new to strategy (Mantere & Vaara, 2008). Even within an intendedly inclusive strategy process, the unfamiliarity of the discourse can have exclusionary effects. Novices in the corporate strategy process need to develop the discursive competence to meaningfully participate if the potential benefits of inclusion are to be fully realized. Yet, while we have increasing reports of employee inclusion in strategy processes (Stadler et al., 2021; Whittington, 2019), we know very little about how employees develop the discursive competence to contribute effectively to them.

Against this background, this study addresses the following research question: *How do employees develop the discursive competence required to gain senior management attention in inclusive strategy processes?* To answer this question, we draw on data from a longitudinal, ethnographic case study of an international insurance company, which invited into its corporate strategy process 40 mid and lower-level managers and professionals (henceforth employees). These employees, who were inexperienced in engaging with senior management on corporate-level strategy, participated in their company's strategy development process over a period of 20 weeks. They were tasked with providing senior management with ideas for a new strategic plan that would both win the commitment of employees in general and regain the support of skeptical investors. Our study found many failures in employees' initial attempts to gain senior management attention. However, employees learned from their failures and a process that initially risked collapsing did finally contribute to the organization's formal strategy: about one-third of the employees' proposals were finally adopted into the company's final strategic plan. The plan's presentation to investors was greeted by an increase in share price of three percentage points (i.e., an \$18bn increase in market capitalization).

Our analysis of how employees develop discursive competence identifies four varyingly effective discursive practices enacted by the employees. These practices differ in the extent to which they integrate novel ideas based on the employees' local knowledge with the wider corporate themes with which senior management is already familiar. The more coherently a practice links the local and the corporate, the greater the likelihood that senior management pays attention to them. Over the course of the strategy process, employees became more competent at combining local knowledge with corporate themes and were therefore more successful in gaining senior management attention for their ideas. Employees acquired this competence both by the experiential learning (Kolb, 1984; Morris, 2020) of direct participation in strategy interactions and by the vicarious learning (Bandura, 1971; Myers, 2021) of observing the interactions of other employees. The addition of vicarious learning substantially accelerated overall learning. We also found that senior management could support employees' learning by coaching them about their discursive practices. However, not all coaching was equally effective: “specific” coaching accelerated learning more than “generic” coaching. Based on these findings, we develop a process model that describes the different dynamics in the development of employees' discursive competence in gaining senior management attention in inclusive strategy processes.



Our study contributes to three streams of literature. First, we contribute to the emerging literature on the DABV (Ocasio et al., 2018, 2023) by showing how interactions in communication channels are not only means for gaining attention, but also potential sites for learning. Learning expands the communicative capacity of these communication channels; the transparency of these channels accelerates learning by allowing for the observation of others' experience. Thus, channels should be designed with regard to learning as well as communication. We also suggest the importance for dynamic communicative interactions of attention quality as well as attention quantity. Second, our study contributes to the literature on issue selling (Ashford et al., 2017; Howard-Grenville, 2007) by highlighting that issue selling is not just a bottom-up responsibility, but a competence that senior management have an important role in cultivating. Finally, we contribute to the literature on inclusive strategy processes (Neeley & Leonardi, 2018; Seidl et al., 2019; Stadler et al., 2021; Whittington, 2019) by showing that potential failures in reaching the intended benefits of inclusion can be avoided by developing employees' discursive competence through the design of both employee learning opportunities and appropriate senior management coaching.

2 | DISCURSIVE COMPETENCE AND SENIOR MANAGEMENT ATTENTION

There has been a recent trend toward more inclusive, or “open,” forms of strategy making (Dobusch et al., 2019; Neeley & Leonardi, 2018; Splitter et al., 2021; Stadler et al., 2021; Stjerne et al., 2024). The extent of inclusion can vary from the crowdsourcing of ideas from employees and other stakeholders to deep employee engagement in strategic projects (Friesl et al., 2023; Vaara et al., 2019). IBM, for example, simply collected employees' ideas for their new innovation strategy, while Barclays Bank went more deeply by tasking their employees to co-create a new strategy with the top management. By including employees in their strategy processes, organizations hope to tap into employees' operational and local knowledge (Brielmaier & Friesl, 2021), leading to more diverse strategic ideas and better decision-making (Dobusch et al., 2019; Stadler et al., 2021). Including employees in the strategy process can also facilitate strategy implementation since they often have a better understanding of what strategies are realistic (Mantere & Vaara, 2008; Tavella, 2020; Timming, 2015).

However, inclusion initiatives often disappoint (Hautz et al., 2019). Employees are a particular factor: they may fail to engage (Dobusch et al., 2019); they may make inappropriate contributions (Neeley & Leonardi, 2018); they may be overwhelmed by other tasks (Whittington, 2019); or they may lack the competence to participate effectively (Brielmaier & Friesl, 2021). The discourse of strategy is also an important barrier. For those new to strategy, strategy discourse often appears mysterious or unconsciously promotes hierarchical understandings of responsibilities, with inadvertent exclusionary effects (Hardy & Thomas, 2014; Mantere & Vaara, 2008). Formal inclusion processes do not therefore translate automatically into effective participation (Brielmaier & Friesl, 2023).

We highlight the gaining of senior management attention as a crucial issue in the success of inclusive strategy initiatives. As the attention-based view (ABV) points out, “... to explain firm behavior is to explain how organizations and their structures channel and distribute the attention of their decision-makers” (Ocasio, 1997, p. 203). The problem is that senior management



decision-makers may not be able to provide appropriate attention. This is often the quantitative problem of providing enough attention, as senior managers face distractions from alternative channels of communication (Cho & Hambrick, 2006; Ocasio, 1997) and overloaded agendas (Laamanen et al., 2018). Apart from that, there is also the problem of attention quality (Ocasio et al., 2023). Attention quality has been discussed before as the capacity to sustain attention over extended periods of time, where attentional stability, vividness and coherence are important (Rerup, 2009). Here, we feature senior management attention quality in terms of effortful understanding. This understanding is likely to be particularly challenging for inclusive strategy initiatives involving brief episodes of interaction between frontline employees and senior managers. Employees are typically inexperienced with the discourse of strategy and thus liable to struggle to make their ideas appear relevant (Luedicke et al., 2017; Spee & Jarzabkowski, 2011). Hence, even if invited to present their ideas to senior management, employees might not gain the attention quality necessary for proper engagement with those ideas. Senior managers might “notice” (Nicolini & Mengis, 2023) employees’ contributions, but fail to encode and interpret information that is based on the highly contextualized knowledge of operational roles or framed in an unfamiliar or specialized discourse (Ocasio et al., 2023; Rerup & Zbaracki, 2021). Attention quality refers to the effort it takes to understand information sufficiently to produce a productive response.

The availability of an inclusive communication channel is therefore not the same as being able to use it effectively. To address practical usage, we draw on the recent DABV, which seeks to shift the ABV’s initial focus on the “pipes and prisms” of the channels themselves to the communicative interactions that occur within them (Ocasio et al., 2018). In the DABV, management attention results from “a continuous, though differentiated, stream of communication that evolves dynamically over time” (Ocasio et al., 2018, p. 162; Ocasio et al., 2023). The DABV thus highlights how communicative interactions are “a process by which speakers interact with other speakers and recipients to jointly attend to and engage with an understanding of organizational and environmental phenomena” (Ocasio et al., 2018, p. 159). Continuous communicative interactions are the medium through which organizational participants co-orient themselves to strategic issues and initiatives. In inclusive strategy processes, this means that attention is shaped by the “interactions between managers at the top and employees below” (Ocasio et al., 2023, p. 6). The DABV’s focus on interaction points to the importance of both senior managers and employees getting things right, the first in terms of attention and the second in terms of discourse. At the same time, the emphasis on dynamic evolution allows for interactions becoming more effective over time.

Although not focusing on continuous communicative interactions per se, research on issue selling and strategy communication does indicate how employees might gain attention from senior management. A common theme is integration. Thus, the issue-selling literature suggests that employees are most effective in eliciting attention for their issues when they “bundle” issues of personal concern with organization-level concerns such as profitability (Ashford et al., 2017; Dutton et al., 2001; Gorgijevski et al., 2019). Howard-Grenville (2007) finds that issue sellers combine contextual knowledge (meanings, interests, and norms) with novel aspects of the issue to gain attention for this issue. Similarly, the wider literature on strategy communication suggests the need for integrating different types of content for effective communication. For example, in their study of Silicon Valley, Kannan-Narasimhan and Lawrence (2018) find that innovators gain adoption for their innovations by discursively constructing them in ways that are coherent with the organization’s strategy. At the Italian design company Alessi, the strategy-makers wrote lengthy narratives for their various audiences that carefully combined



novel and familiar kinds of content (Dalpiaz & Di Stefano, 2018). And Westley (1990) made the theoretical case for the importance of “shared cultural vocabularies” capable of integrating both the local knowledge of middle managers and the more general, abstract strategic concepts of top management. In sum, the literature suggests that employees are most likely to be effective in gaining senior management attention when they integrate different types of discursive content, whether the novel and the familiar or the local and the strategic.

These kinds of integration are not easy for employees, requiring high levels of “discursive competence” (Rouleau & Balogun, 2011, p. 954). Various studies have shown that even relatively experienced middle managers frequently struggle to engage their superiors in mutual sensemaking (Hope, 2010; Rouleau, 2005; Rouleau & Balogun, 2011) or to compel acknowledgement of their issues by top management (Glaser et al., 2016; Lauche & Erez, 2022; Thomas et al., 2011). Frontline employees are even more likely to lack the competence to integrate local and strategic discourses due to their inexperience in strategy interactions. Developing the discursive competence required to gain senior management attention is liable to be a considerable stretch. Employees “have to learn what to say but also what not to say” (Brielmaier & Friesl, 2021, p. 4).

Current ABV and DABV studies have not yet addressed the acquisition of discursive competence, particularly the learning required to gain senior management attention. However, the ABV and DABV do stem from the broader Carnegie School tradition for which learning is an important theme (Gavetti et al., 2012). The learning literature proposes two mechanisms through which learning to gain attention might occur. First, there is learning from direct experience (Argote et al., 2021; Dahlin et al., 2018; Shapira, 2020), typically termed “experiential learning” (Kolb, 1984; Morris, 2020). Experiential learning is noted in studies on issue selling that point to the role of experience in the capacity to sell issues effectively (Dutton et al., 2001). As Howard-Grenville (2007, p. 574) remarked: “issue sellers build this capacity... through reflecting and skillfully building on prior interactions.” Interactions provide direct feedback on what works and what does not. The second learning mechanism relies on the social nature of individual learning. Bandura (1971) has coined the term “vicarious” learning that is learning through observations of other members of a social group performing a task. In vicarious learning, others’ experiences are beneficial for individual learning because making sense of another’s experience helps refine and expand one’s own “repertoire of possible responses to future events” (Myers, 2021, p. 928). Individuals learn indirectly from observing the feedback in others’ interactions. Experiential and vicarious learning are not necessarily distinct: they can have a joint effect on learning. Vicarious learning allows individuals to enhance their own experiential learning (Dahlin et al., 2018; Diwas et al., 2013).

In sum, although employees at various levels are now frequently included in strategy making, we know that realizing the potential benefits of such participation is fraught with difficulty. Drawing on the recent DABV (Ocasio et al., 2018), we focus on the evolving communicative interactions between employees and senior managers. Effective interaction depends on both parties. Employees’ initial lack of discursive competence, especially the capacity to integrate distinct forms of knowledge in a meaningful way, is liable to limit decision-maker attention to their ideas. At the same time, senior managers must be able to offer appropriate attention, both in terms of quantity and quality. In line with the DABV, we argue that communicative interactions may dynamically evolve, reflecting opportunities for learning. In particular, these communicative interactions may allow employees to acquire discursive competence through both experiential and vicarious learning. Accordingly, our study addresses the research question of



how employees develop the discursive competence required to gain senior management attention in inclusive strategy processes.

3 | METHODS

To get an in-depth understanding of how employees develop the competence to gain senior management attention, we adopted an ethnographic, longitudinal, single case study approach, which seemed particularly suitable for our purposes. Case studies allow researchers to get close to the theoretical constructs and causal forces of interest (Joseph & Ocasio, 2012; Siggelkow, 2007) and are effective when the study is directed at “how” questions (Eisenhardt & Graebner, 2007). We chose a revelatory case (Yin, 2009) of an inclusive strategy process that involved a set of employees who possessed no prior experience in engaging with senior management on corporate strategy, thereby allowing us to examine their discursive competence development. The adoption of an ethnographic approach is particularly helpful when the aim is to get an in-depth understanding of the way people enact discursive practices in real life-settings (Vesa & Vaara, 2014). Additionally, the longitudinal design (Yin, 2009), in our case across several months, allowed us to capture the complex dynamics of communicative interactions over time. In particular, we could observe these dynamics over several interaction episodes (Hendry & Seidl, 2003), that is, several meetings with interactions between the employees and the CEO.

3.1 | Case context

We conducted our study in a large, diversified international insurance company with more than 55,000 employees and operating in over 50 countries. At the beginning of our study in 2016, the company was in crisis, with the unexpected departure of its CEO. The newly appointed CEO decided to renew the strategic plan for 2019 with the aim to “restore the confidence” of investors and other stakeholders who were worried by poor performance and a low share price over the preceding years. He intended to strengthen the company’s core businesses and to increase their profitability, but he was unclear where the opportunities were and how precisely to pursue them.

Based on his experience with an open strategy process at another company, the CEO decided to design a similar strategy development process. For this purpose, he invited frontline employees to discuss ideas for the new strategic plan. Kicking the process off, the CEO put a video message on the internal website announcing the new strategy process and calling for applications to participate in the strategy process: “We want you to bring in your expertise, passion, and energy to work in a team of chosen individuals on shaping our strategy. We are looking for 40 colleagues from across the business who are innovative, experts in their field, fluent in English, and committed to put in an extraordinary effort. This is a unique moment for the company and a unique chance for you to share your vision for our future”. Following the CEO’s call, the strategy team received 2200 applications, from which they excluded all applications not meeting the basic selection criteria above. Out of the remaining 1800 applications, they selected 200 applications reflecting the number and size of the organization’s main markets, the range of functions and gender balance. They then asked the remaining applicants to send in a video message in which they should explain their vision for the company, assessing



these videos based on the innovative quality and thoroughness of suggested ideas. They made the decision on the final 40 employees based on personal interviews assessing applicants' willingness to put an extraordinary effort into the process. Table A1 provides an overview of the demographics of the selected employees: 67% were male, with an average age approaching 31 and an average hierarchical level of 1.8 out of 6 hierarchical levels (the highest position was four hierarchical levels down from the CEO). Overall, the strategy group consisted of those 40 employees, the head of strategy and his deputy, the CEO, 12 facilitators who would support employees' discussions and several internal consultants who supported the process by collecting information and conducting analyses. The participants were subsequently split into eight employee working groups, each focused on a particular topic: that is, products and services, customers, distribution, operations and technology, footprint, finance, brand and marketing and culture, capabilities, and people (see Table A1 for the employees' assignment to the working groups).

The strategy process was targeted at the first investor day for the newly appointed CEO at which he had to present a new strategic plan aimed at restoring investor confidence. The main work of strategy development took 20 weeks. Over these weeks, all employees would alternate between "on-site weeks" during which they came together to work on the new strategy, and "off-site weeks," during which they would go back to their regular duties. During the on-site weeks, all employee groups met in person for 4 days of around 10–12 h each day. The main event at the end of each on-site week was a face-to-face meeting with the CEO in which the employee groups discussed their ideas with him. In those meetings, the groups, one by one, first presented and then discussed their ideas with the CEO, with all members of the respective group involved in the presentations and discussion. When one of the groups presented and discussed their ideas with the CEO, the employees of the other, non-presenting groups were also present. The fact that the exact same set-up of these meetings was repeated over the entire process allowed tracking changes in the employees' competence at gaining the CEO's attention. However, these dedicated face-to-face meetings did not mean that the employees were guaranteed the CEO's attention. He was often distracted by incoming calls (he left the phone either on or on vibration mode and sometimes left the meeting room to take calls) or by emails and other messages that he received on his phone during the meetings. In particular, the CEO's attention was being heavily competed for by a simultaneous major restructuring process.

While the formal set-up of the face-to-face meetings was exactly the same across all weeks and while all employee groups attended all CEO meetings, for reasons of time just four employee groups were allowed to discuss their ideas in the first three meetings, with the other four groups starting later (see Figure 1 for when each employee group discussed their ideas). As in Table A1, the first four groups (1–4) were almost exactly equivalent in hierarchical level to the later groups (1.77–1.76), slightly older (31.18–30.33 years), very similar in business education experience (86.36–88.89%) and somewhat more female (36.36–27.78%). Overall, the working groups produced 25 strategic ideas by the end of the strategy process, of which 12 were included in the final strategy: for example, an improved customer relationship model in the corporate business, new transfer pricing guidelines for the retail business and an improved profitability index (see last column in Table A2). Groups 1–4 (who discussed their ideas with the CEO from the start) produced five ideas that were included in the strategic plan; groups 5 (discussing their ideas from week 6 on) and 6 (discussing their ideas from week 8 on) each produced two ideas that were included in the final strategic plan; and groups 7 and 8 (who discussed their ideas from week 12 on) produced together three ideas that were included in the final plan.

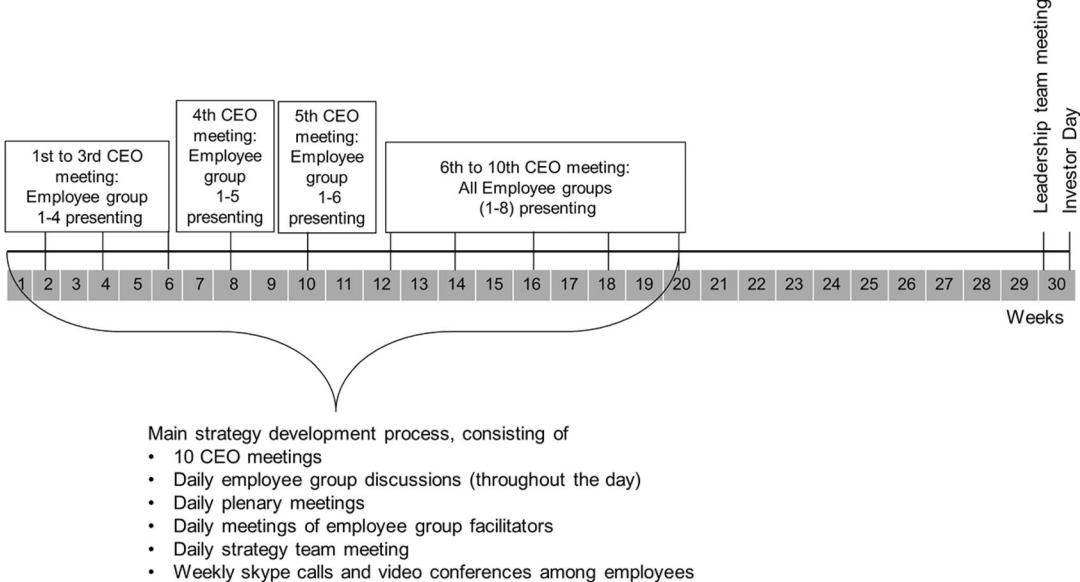


FIGURE 1 Timeline of main events of the strategy process.

3.2 | Data collection

In line with the case study approach (Yin, 2009), we collected data from multiple sources. An overview of the data is provided in Table 1.

The main data source was nonparticipant observation of the entire strategy process. During the on-site weeks, the first author spent four to five full days at the company observing all meetings, that is, all CEO meetings, plenary meetings, meetings of the employee group facilitators, strategy team meetings as well as some of the employee groups' day-to-day discussions and interactions. She audio recorded the discussions and meetings and took detailed field notes within 24 h after each meeting. The researcher's presence was quickly accepted which allowed her to observe all work-related activities. She made sense of her observations by writing weekly summaries including ideas and initial interpretations related to what she was observing, which she discussed at the end of each week with one of the co-authors.

The field researcher also conducted 125 semi-structured interviews (lasting between 30 min and 1.5 h) which were spread out over the entire strategy-development process. In the on-site weeks, she interviewed some of the participating employees of each employee group, some of the employee group facilitators, as well as the head of strategy. The questions in these interviews mainly related to perceptions of the progress of the strategy development, the reasons for these perceptions and the interviewees' ideas on improving the process. Intermittently, the field researcher interviewed the internal consultants and the CEO. She mainly asked these interviewees about their perception of the progress of the strategy development as well as about their satisfaction with the employees' involvement and ideas. After the strategy development process was completed, she conducted additional interviews with members of the strategy team and some of the employees to track progress in implementing the strategy. Interviewing all participants helped to understand the dynamics of gaining attention and employee learning from different perspectives.

**TABLE 1** Data overview.

Observations	454.5 h
CEO meetings	40 h
Strategy team meetings	53 h
Work stream discussions	171 h
Plenary sessions	147 h
Strategy team video conferences	13.5 h
Leadership team meetings	30 h
Interviews	125
Diary recordings	11 h
Documents	~5400 pages

The field researcher also collected 11 h of diary recordings from the employees, in which they reflected on the CEO's reception of their ideas. These diary recordings helped us understand how the employees experienced their discussions with the CEO and what they took away from these meetings. In addition, numerous documents relating to the unfolding content of the strategic plan were collected. This included PowerPoint slides, texts explaining the slides, as well as notes and drawings. These multiple data sources enabled us to triangulate our findings (Hartley, 2004; Yin, 2009), thereby enhancing their trustworthiness (Lincoln & Guba, 1985).

3.3 | Analysis

While data collection was conducted primarily by the first author, the analysis involved all three authors. This allowed complementing the view of the “primary researcher,” who had been immersed in the empirical field, with those of the two “secondary researchers” to ensure a more objective analysis of the data (Feldman & Shaw, 2019). We adopted an abductive approach in our data analysis, iterating between interpreting our empirical data and consulting the literature those interpretations resonated with (Tavory & Timmermans, 2014). As is characteristic of such abductive approaches, we explored multiple interpretations in parallel, with the aim of selecting the “best explanation” (Mantere & Ketokivi, 2013). When we started the analysis, we were broadly interested in understanding how the employees contributed to the strategy process. Observing firsthand, the employees’ initial struggles to gain the CEO’s attention and their increasing success drew us to the DABV and particularly the interactions between employees and senior management and their potential role in employee learning.

Our analysis proceeded in several steps. For simplicity, we present the different steps of our analysis in a linear way, even though the actual analysis was a more iterative process. Having created a timeline of the key events and ordered our dataset chronologically, the first step of our analysis focused on all instances in which the employees attempted to gain the CEO’s attention for their ideas during the regular CEO meetings (these meetings were the only sites in which the employees had the opportunity to do so). Across all meetings, we identified 880 statements (i.e., verbal utterances) by the employees in which they tried to gain the CEO’s attention for their ideas; and 880 corresponding responses by the CEO reflecting his attention.



Informed by our distinction between attention quantity and quality, we recognized that not all kinds of attention were the same. We noticed important gradations in the CEO's attention. On one end of the spectrum we coded responses as *no reaction*, when the CEO remained silent with no verbal reaction. We interpreted this as indicating at most minimal attention. On the other end of the spectrum, we found responses in which the CEO directed his attention to the substance of the employee's statements; that is, the CEO seized on the employee's idea and initiated a continuous interaction on it, showing his willingness to engage with it in the future (which might or might not lead to the eventual adoption of the idea). We coded these instances as *substantive attention*. Substantive attention involves high levels of both interpretation and focus in terms of time and effort (Ocasio, 1997), because it requires the CEO to engage with employees' ideas constructively and, often, in continuous interaction. Substantive attention is high quality on account of the effortful understanding involved. In between these two extremes were responses in which the CEO did not focus his attention on the substance of an employee statement but on the form by which the employee had uttered the idea, such as when the CEO commented on the way the idea was expressed. We noticed that these responses included instructions on how to convey ideas differently or better and thus we coded them as instances of *coaching*. Examining these instances further, we noticed differences in the CEO's coaching. When the CEO provided guidance on what specific aspect of the statement needed to be changed or added in order for the statement to better convey the idea, we coded these reactions as *specific coaching*. When the CEO provided only generic or abstract feedback about how to formulate meaningful statements (i.e., without providing guidance on what aspect of the statement needed to be changed or added), we coded the respective instances as *generic coaching*. Specific and generic coaching might involve the same quantity of attention as measured by the length of the feedback, but the first is higher quality because requiring more effortful understanding of specifics. By inductively coding the CEO's responses in this way over the course of all CEO meetings, we recognized significant changes in the CEO's responses over time. While the CEO initially showed mainly no reaction or reacted only with generic coaching, he became more substantively engaged as time progressed. Interview data from the CEO, the head of strategy and the employees corroborated this finding.

In the second step, we tried to identify reasons for the change in the CEO's attention. In line with the literature on employee participation which points to employees' lack of discursive competence (Mantere & Vaara, 2008; Rouleau & Balogun, 2011), we explored whether the change could be linked to changes in the way the employees communicated their ideas. From the interviews, we gathered that the employees themselves believed that their success or failure to engage the CEO's attention had to do with their ability to communicate their ideas. Other factors were held equal for the period of our study. There was no significant change in the set-up of the meetings or the people participating in those meetings across the different weeks and the topics assigned to different employee groups did not change. Our observations and interviews found little change in the CEO's approach either. Later systematic analysis of the CEO's reactions corroborated this conclusion. As described in Table A3, the CEO's responses to specific discursive practices were broadly the same over time: for example, he responded fairly consistently with no reaction or merely generic coaching to mirroring and localizing; and fairly consistently with substantive attention to integrating (see explanation of those practices further below). The CEO had prior experience in leading an inclusive strategy process in his previous company, so it was the employees who were the novices rather than him.

Having consulted the literature on strategy communication that points to the bundling and integrating of themes (e.g., Dalpiaz & Di Stefano, 2018; Dutton et al., 2001), we thus went through all 880 employee statements and first identified the particular themes that they referred



to (for instance, company profitability or the local experiences of the employees), which we clustered into two general discursive themes: (1) all themes that related to employees' direct current or future working experiences (e.g., as underwriter, claims handler, or business-unit manager) were clustered into an overall *local discursive theme* and (2) all themes that related to the current situation of the company as a whole or its future development (e.g., current and future performance, company culture, or shareholder pressure) were clustered into an overall *corporate discursive theme*. Second, and referring again to the literature on strategy communication, and particularly on different degrees of *coherence* of a statement (Brown, 1990; Vaara, 2002), we coded how coherently the local and corporate discursive themes were connected or bundled in each of the employees' statements. In line with other studies (Holstein et al., 2018), we coded a statement as coherent when it provides a rationale for how the discursive themes are connected. Drawing on this literature, we classified employee statements according to the extent to which they coherently integrated the local and corporate themes. Those statements that were coded as not coherent either failed to provide a rationale to link the themes; or they referred to just one of the discursive themes. Based on this distinction, we identified four different patterns of employee statements that we coded as different "discursive practices" (Tavella, 2020), namely mirroring (statements solely drawing on or reflecting corporate discursive themes), localizing (statements drawing solely on the local discursive themes), paralleling (statements drawing on both the corporate and local themes without providing a rationale of how they are connected) and integrating (statements drawing on both corporate and local themes coherently connecting them).

In the third step of our analysis, and consistent with the DABV's focus on interaction, we related the employees' discursive practices to the different CEO's responses, creating "practice-response pairs" as our unit of analysis. Comparing the number of times that a particular discursive practice of the employees was followed by the gradation in CEO attention (no reaction, substantive attention, generic, or specific coaching) revealed significant differences between practices: the more coherently the themes were connected in a practice, the more likely it was followed by substantive attention (see Table 2 in the Findings section)—independently of whether it took place at the beginning or end of the 20-week process (see Table A3). To understand the reasons for these differences, we further analyzed the interview data with the CEO, the strategy team, and the employees as well as our observations surrounding the exchanges with the CEO. This analysis revealed that the lack of coherence in the employees' statements made it difficult for the CEO to understand the novelty or relevance of the statements and thus to engage with them substantively. Relating these findings back to the change in CEO attention over time (in the first step of our analysis), we examined the distribution of the four employee discursive practices across the different weeks of the strategy process. This analysis revealed that those practices that had been shown to be more successful in eliciting the CEO's substantive attention were enacted toward the end of the process, while the less successful practices were enacted at the beginning (resulting in Table 4 and Figure 2 in the Findings section)—while the CEO showed consistently more substantive attention to the former practices than the latter, independently of when they were enacted, who enacted them (including the hierarchical level of the employee enacting the practice), and which topics were related to the practices (see again Table A3).

In the fourth step, we examined the reasons for the temporal distribution of the discursive practices. Analyzing the interviews with employees and other participants as well as our field notes and audio recordings of their discussions and reflections about their interactions with the CEO after each meeting, we found that the differential enactment of discursive practices over time was related to the development of employees' ability to coherently connect the discursive themes. In line with Rouleau and Balogun (2011), we labeled the ability to coherently link



TABLE 2 CEO's responses (in %) to each practice.

Employee practice	Substantive attention	No reaction	Generic coaching	Specific coaching
Mirroring	0.02	0.38	0.54	0.06
Localizing	0.04	0.20	0.56	0.20
Paralleling	0.09	0.03	0.11	0.77
Integrating	0.63	0.01	0.03	0.33

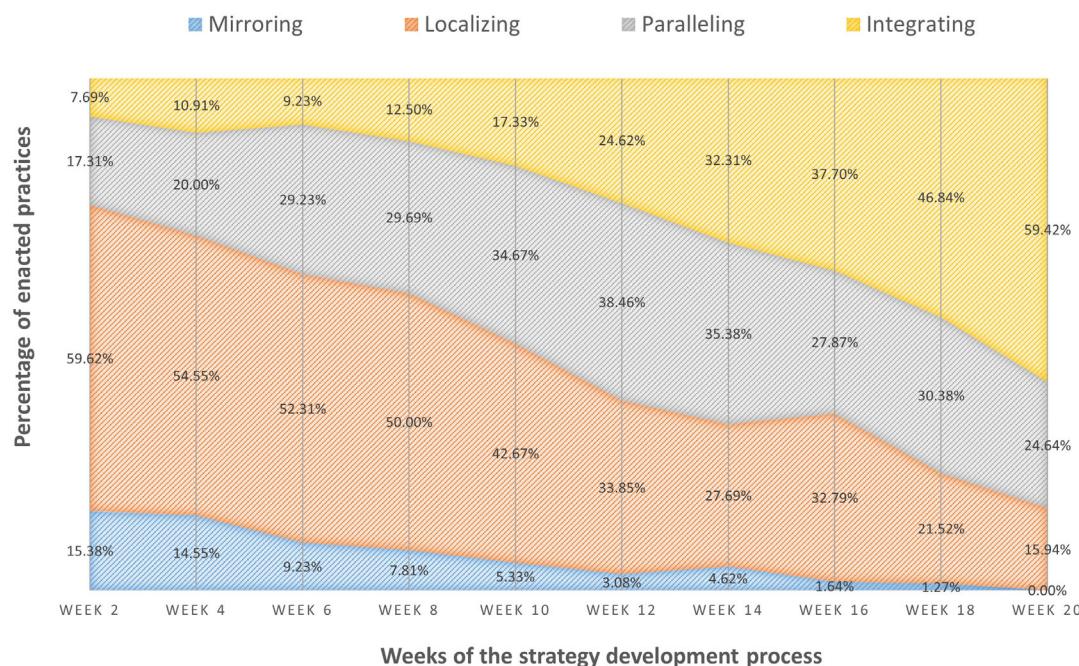


FIGURE 2 Enactment of discursive practices over time.

corporate and local themes as *discursive competence*. Taking advantage of the fact that some employee groups only started to discuss their ideas with the CEO in later weeks while others started earlier (see Figure 1), we were able to corroborate that the enactment of different discursive practices over time was not triggered by the different stages of the strategy process but by the development of the employees' discursive competence. In addition, by checking whether the different employee practices are related to the different ideas discussed, we did not find evidence that the variations in discursive practices were related to the content discussed.

In the fifth step, we returned to the practice-response pairs in all CEO meetings (identified in step three) to examine the employees' learning process, that is, the development of their discursive competence. In line with previous studies that examine learning in terms of behavioral change (Rerup, 2009), we examined the extent to which the employees' enactment of the discursive practices changed from one CEO response to the next. This detailed analysis revealed that the employees moved from the less successful discursive practices to the more successful ones *in response to* the CEO's reactions. However, referring to the different CEO reactions, we found that some of the CEO's reactions were more conducive to employee learning than others. The


TABLE 3 Comparison of developmental and non-developmental learning chains.

Type of chain	#	Average # of pairs	Percent of employee practices^a				Percent of CEO responses^b			
			1	2	3	4	0	1	2	3
Non-developmental	62	3.9	12.9	54.44	23.79	8.87	21.67	51.67	26.67	0.00
Developmental	52	7	6.58	24.66	30.33	38.44	5.71	20.12	42.94	31.23

^aMirroring (1), localizing (2), paralleling (3), and integrating (4).

^bNo reaction (0), generic coaching (1), specific coaching (2), and substantive attention (3).

interview data and our observations of the employees' discussions about their experiences of interacting with the CEO provided further evidence that the employees learnt from the CEO's responses and illuminated why they learnt better from some types of responses than others. In addition, consistent with the DABV's emphasis on continuous communications, we analyzed several successive practice-response pairs, which we labeled "chains of practice-response pairs" (all chains of practice-response pairs are displayed in Table A2). As we found, some chains eventually resulted in the enactment of more successful practices and the CEO's substantive attention (highlighted in Table A2): we termed these *developmental learning chains*. This step in the analysis allowed us to see that it often took several turns (i.e., practice-response pairs) to enact the practice of integrating, and thus to gain the CEO's substantive attention. In addition, we were able to compare the developmental chains (i.e., chains that lead to the enactment of successful practices) and non-developmental chains (i.e., chains that did not lead to the enactment of successful practices) in terms of the average number of practice-response pairs, how often each discursive practice was deployed by the employees and how often the CEO showed the different kinds of responses (see Table 3 in the Findings section).

Our analysis of the discursive practices enacted by employees who started to discuss their ideas with the CEO at different points in time (in the fourth step of the analysis) revealed another pattern: employees who started to discuss their ideas later progressed much faster to the more effective discursive practices than those employees who started to discuss their ideas earlier. Since the composition of the groups was very similar (see Table A1) and since the CEO's responses to specific discursive practices were broadly the same over time (see Table A3), we looked for other factors that could explain this pattern. We thus re-analyzed the employees' interviews and diary recordings examining how they described their experience of the CEO meetings. This analysis revealed that the employees learnt not only from their direct interactions with the CEO (as found through the analysis of the practice-response pairs) but also from their observations of the interactions of their fellow employees with the CEO. In line with the learning literature (Bandura, 1971; Kolb, 1984; Morris, 2020; Myers, 2021), we labeled this form of learning *vicarious learning*, in contrast to the *experiential learning* of direct interactions with the CEO.

4 | FINDINGS

4.1 | Employee discursive practices and CEO substantive attention

When the inclusive strategy process kicked off, the CEO was very excited at the prospect of engaging with employees' novel ideas that would not be "filtered and not ... constrained"

TABLE 4 Enacted practices (in %) by each employee group over time.

Groups 1-4		Week 2	Week 4	Week 6	Week 8	Week 10	Week 12	Week 14	Week 16	Week 18	Week 20
Mirroring	0.15	0.09	0.08	0.03	0.03	0.00	0.04	0.00	0.00	0.00	0.00
Localizing	0.78	0.64	0.46	0.34	0.15	0.20	0.09	0.04	0.00	0.00	0.00
Paralleling	0.07	0.18	0.38	0.53	0.52	0.37	0.35	0.20	0.14	0.09	0.09
Integrating	0.00	0.09	0.08	0.09	0.30	0.44	0.52	0.76	0.86	0.91	0.91
Group 5		Week 2	Week 4	Week 6	Week 8	Week 10	Week 12	Week 14	Week 16	Week 18	Week 20
Mirroring	-	-	-	0.11	0.10	0.07	0.04	0.00	0.00	0.00	0.00
Localizing	-	-	-	0.83	0.60	0.37	0.29	0.12	0.00	0.00	0.09
Paralleling	-	-	-	0.06	0.27	0.43	0.42	0.35	0.38	0.00	0.00
Integrating	-	-	-	0.00	0.03	0.13	0.25	0.53	0.62	0.91	0.91
Group 6		Week 2	Week 4	Week 6	Week 8	Week 10	Week 12	Week 14	Week 16	Week 18	Week 20
Mirroring	-	-	-	-	0.19	0.08	0.09	0.00	0.00	0.00	0.00
Localizing	-	-	-	-	0.76	0.54	0.41	0.50	0.27	0.00	0.00
Paralleling	-	-	-	-	0.00	0.38	0.36	0.09	0.20	0.15	0.15
Integrating	-	-	-	-	0.05	0.00	0.14	0.41	0.53	0.84	0.84
Groups 7 and 8		Week 2	Week 4	Week 6	Week 8	Week 10	Week 12	Week 14	Week 16	Week 18	Week 20
Mirroring	-	-	-	-	-	-	-	0.13	0.05	0.04	0.00
Localizing	-	-	-	-	-	-	-	0.65	0.50	0.25	0.23
Paralleling	-	-	-	-	-	-	-	0.17	0.41	0.50	0.23
Integrating	-	-	-	-	-	-	-	0.04	0.05	0.21	0.54



(Interview CEO, week 6). However, the CEO was soon disappointed. As he explained in an interview,

I feel frustrated that I have more ideas than them [the employees]. I mean ... I heard a lot of good things [but] I was forced to say, "Okay. Thank you. I would be curious to hear more ideas [which] are evolutionary on what we have". (Interview CEO, week 8).

The CEO often did not react to employee ideas during the early meetings (as can be seen in Table A3, 31.8% of employee statements elicited no reaction in week 2). We also observed that he attended to other communication channels instead, for example answering emails and other messages that he received on his mobile phone and picking up incoming voice calls or even leaving the room stating, "I need to make a call" (second CEO meeting). Even when he was not engaged in other communication channels, he often seemed pre-occupied with other issues. It seemed as if the inclusive strategy process was failing due to a lack of CEO attention. However, in the following weeks the CEO recovered his interest in the employees' contributions. In week 14, he told the employees,

The way you have been developing your thinking is clearly appreciated ... the basic issues are there, the basic analysis is there, some directions we're going to is there as well ... the directions you are looking at are directions that are definitely viable. I'm not going to say we're going to implement them all, but they're viable, they're very, very important to focus the discussion we're going to have at the board meeting in October ... and then subsequently in November [at the investor day]. (CEO, plenary meeting, week 14).

Thus, over the course of the strategy process, we observed a marked change in the CEO's attention. We traced this change back to the discursive practices enacted by the employees. Examining the employees' statements, we identified four discursive practices that differed in their capacity to engage the CEO's attention: mirroring, localizing, paralleling, and integrating. As illustrated in Figure 2, the mix of these practices varied radically over the course of the strategy process. As we will show in this section, employees initially enacted practices that failed to attract the CEO's substantive attention, while later they enacted practices that succeeded. Thus, the change in employees' discursive practices helps explain why the CEO started to engage substantively with their ideas at the end rather than at the beginning of the process. In the following, we will illustrate each practice and explain why these practices varied in their effectiveness in gaining the CEO's substantive attention.

Initially, the employees enacted primarily the discursive practice of *mirroring*, which typically did not gain the CEO's substantive attention. When employees mirrored, they referred in their statements solely to corporate discursive themes, with no reference to their local experience—as if they tried to imitate the way strategists speak. An illustrative example of mirroring is provided in the next quote, in which one of the employees suggested providing insurance expertise to the customers.

So, we want to look at ... what we're good at ... Really looking through the internal and external data, both on a mature and emerging basis, to understand that across the businesses. As we found we are providing that expertise [for the customers],

both on a product and service [level], and make sure that we're making the right decision ... from a cost perspective, this [providing the expertise to the customers would] give us that return on investment. So we really see that as the key success factor. (Employee Donald, 2nd CEO meeting, week 4).

Here, the employee referred to the corporate themes by stating that they looked at "what the company is good at...across the business" from a "cost perspective" to come up with this suggestion. However, the CEO did not substantively engage with such contributions as they did not provide any novel ideas based on employees' local themes, as the CEO explained:

They [the employees, should] find something different [based on] what we are today and what they know. Otherwise, I wouldn't be here. If it were just about repeating [what we already do], it would be much easier. (CEO, meeting with working group facilitators, week 6).

Mirroring failed to gain the CEO's substantive attention because it just reiterated the corporate themes which the CEO already knew, without adding additional insights. Table 2 shows that only 2% of employees' statements based on mirroring appeared to elicit substantive attention.

As well as mirroring, employees initially relied heavily on the discursive practice of *localizing*, which also typically failed to gain substantive attention. When employees localized, their statements drew solely on the local discursive themes of their professional or business unit-specific contexts. An example of localizing comes from one of the first CEO meetings, when an employee suggested improving the customer relationship model, based on the local theme of the Italian business unit.

So, one of the things we've actually done in Italy, is trying to [improve] the customer relationship model, which included a consumer life insurance plan for online costumers ... I mean that's something we can consider doing in the future. (Employee Helen, 2nd CEO meeting, week 4).

In this localizing case, the employee raised an idea based on the specific local context of the business unit in Italy. However, as with mirroring, the CEO typically did not engage substantively with localizing contributions. Referring again to Table 2, only 4% of employees' localizing statements elicited substantive attention. The very specific professional or business unit knowledge involved in localizing did not help the CEO understand whether employee ideas could be extended to the overall company context. Referring to the example above, the following quote shows that he did not see how the local idea of improving the customer relationship model in Italy could be extended to the corporate theme of business profitability:

But [what does this mean? We] cannot go and talk about the customer relationship model in the Italian retail business. They [the investors] don't want to know [these details, they want to know] how these details are making profits in the future. (CEO, 2nd CEO meeting, week 4).

Some weeks down the line, employees switched increasingly from the discursive practices of mirroring and localizing to the practice of *paralleling* (as illustrated in Figure 2). Even though more



successful than localizing and mirroring, paralleling also mainly failed to gain the CEO's substantive attention. When employees paralleled, they drew on both the corporate and local themes, but did not coherently link the two. Instead, the employees merely claimed a meaningful relation between the themes, without providing a rationale for their connection. For example, in the CEO meeting in week 10, one of the employees drew on a local theme (the problems in the Italian retail unit) and the corporate theme (reaching the top five position in the global retail business) to present the corporate retail vision, yet he did not explain how these themes were linked:

We have used the root causes [for the problems in the Italian business unit] to build a retail vision, something that we think we can implement to achieve and retain the relevant and profitable position [of the global retail] we think we need ... And this is a vision that we think is challenging, but achievable, and something that will garner some momentum with those that work in the retail [business units] across the globe ... So, achieving top five position or 5% of market share in our selected markets..by becoming the insurer of choice. (Employee Vincent, 5th CEO meeting, week 10).

In this quote, the employee fails to provide a rationale for linking the local theme, the problems in the Italian business unit, with the corporate theme, the global retail business. Therefore, the CEO struggled to understand the relevance of the employees' local knowledge for the future of the company. For example, in the same meeting the CEO indicated why he did not want to engage with the proposed retail vision based on paralleling:

Can you tell me what is the purpose of this [retail vision]? Because these are nice words [but] I don't link these words to any subject, to any content, to any facts, to nothing. Can we link it? Because people will need to know why we state things. [Currently] I don't buy into it. (CEO, 5th CEO meeting, week 10).

As this quote shows, the CEO typically did not substantively engage with employees' ideas based on paralleling. Table 2 supports this finding: only 9% of employees' statements based on paralleling resulted in substantive attention by the CEO.

The more time passed, the more employees enacted the practice of *integrating* (see Figure 2), which had the greatest potential to elicit the CEO's substantive attention. Employees integrated when they coherently connected the local and corporate themes. For example, in the CEO meeting in week 18, a claims handler suggested introducing industry verticals, thereby integrating his local theme with corporate themes:

For me, from the engagement side of that broker, the industry verticals really are the focus to attract [the broker] who make an important part of our business ... that's why we need these verticals. But currently, [in the company] the verticals are basically not existent. [Even though these verticals would] provide a logic for our engagement model with the brokers because they clearly show the brokers what we want. [Otherwise], I don't think [the brokers] will come to us, like even bring their property in the door. ... the verticals, if we use [them for example in] Switzerland, or the United States [will] have the potential to drive our overall profitability because they allow a framework for all countries to grow. I think that's the idea that I want to lay out. (Employee Izmael, 9th CEO meeting, week 18).



In this quote, the claims handler referred to corporate themes by stating that brokers are “an important part of our business” and that “verticals are not existent” in the company. He then integrated these corporate themes with the local theme of handling claims for brokers (“for me, from the engagement side of a broker”) by providing a rationale that links the themes—in this case “brokers are an important part of the business and need verticals” and the introduction of verticals “will have the potential to drive our overall profitability”. As in Table 2, 63% of employees’ statements based on integrating elicited CEO’s substantive attention. Referring to the example above, the following response by the CEO illustrates his substantive attention to Izmael’s integrating statement:

You are [raising] a fundamental point ... Because let's face the issues we have today. What I hear from the brokers is that (a) they don't know who to talk to in [the company and] (b) we have a volatile, diversified, fragmented risk appetite. I mean, in every office we have a different one ... The brokers would like to know [which risk appetite the company] is following ... You cannot say partially yes, partially no, and here yes, here no. [So, your] idea can give me an answer to that. [But] we don't do that [having verticals for the main countries, yet]. So, we should look into this. (CEO, 9th CEO meeting, week 18).

In this quote, the CEO indicates that he appreciated the employee’s idea because the local professional theme of claims handling for brokers was novel for him and because he was able to make sense of it in the light of the corporate themes. Together, these findings show that employees initially struggled to gain the CEO’s substantive attention, because they employed the ineffective discursive practices of mirroring, localizing and paralleling. However, they managed to gain the CEO’s substantive attention toward the end of the process as they started to integrate. Thus, over time, the employees acquired the discursive competence to coherently integrate the local and the corporate themes, necessary to gain the CEO’s substantive attention.

4.2 | Learning to gain the CEO’s substantive attention

The change from less to more effective employee practices in gaining the CEO’s substantive attention can be explained by employee learning. This learning came directly and indirectly from (extended) interactions with the CEO, including both successful and failed attempts at gaining his attention. The following describes how employees interacted with the CEO to learn the discursive competence of coherently integrating the local and the corporate themes. One of the employees reflected on this learning as follows:

Part of [our journey] is: we've learned, it is learning ... part of this learning was that we have taken it up a level, they [our ideas] were very specific parts of something bigger ... none of us were experts [in strategy]. (Interview employee Silvan, week 18).

This quote shows that employees were aware that they had learned to discursively construct their ideas differently to gain the CEO’s substantive attention. Initially, their contributions were “very specific,” that is, they mainly localized. Over time, they understood that they had to contribute to “something bigger” referring to the corporate themes. Another employee reflected on why employees initially struggled to integrate and developed this competence only in the last weeks of the strategy process:



You know what? I think creativity [in terms of bringing in new ideas] needs to be learned. It's hard for people, on a blank sheet, to say, "Oh, what do we do? What's our strategy? Let's throw in ideas," right? I guess [initially] the people ... came up with thoughts ... without context, right? So, the first ideas that we had ... in the last few months were completely de-contextualized, completely disconnected. [They were] more of these crazy ideas But perhaps the approach that [we are now] taking ... instead ... it's more of a reasonable [one] with new ideas [that reflect] our context and the evolving strategy. (Interview employee Vincent, week 18).

As this quote indicates, the employees initially struggled to gain the CEO's substantive attention because their initial ideas were "completely de-contextualized, completely disconnected." However, we found that employees developed the discursive competence of integrating that allowed them to substantively engage the CEO's attention in two distinct ways, through *experiential learning* and *vicarious learning*.

4.2.1 | Acquiring discursive competence through experiential learning

We found that an important source of developing the discursive competence to gain senior management attention was employees' learning through the direct responses of the CEO, that is, experiential learning. Often the CEO gave no reaction to employees' statements, or he paid attention only to the form of employees' statements (instead of the substance of their ideas) by coaching them on what they needed to do, either specifically or generically. These variations in CEO's responses differed in the extent to which they helped employees acquire discursive competence.

No reaction from the CEO typically did not help the employees to develop discursive competence. Our analysis shows that employees never managed to integrate when the CEO showed no reaction (see Table A2). One of the senior managers explained that no reaction by the CEO was not effective in supporting employee learning because it did not include any feedback on how the employees should integrate local and corporate themes:

Often [the CEO] did not say anything. For the employees this was the worst thing. They intensively thought about their ideas, they presented their ideas and then there is no reaction. Honestly, it is much more helpful for them [the employees] if he says "this is the worst idea I've ever heard for this and that reason," than if he says nothing. I think he often says nothing if he already knows it [the idea] or perhaps because he does not understand the idea. But for the employees it's really unhelpful. (Interview with a strategy officer, after the strategy process).

However, sometimes the CEO engaged with employees' statements by coaching—but the learning opportunities varied according to whether this coaching was *generic* or *specific*. When the CEO engaged in *generic coaching*, he instructed the employees how to develop the proposed ideas in a generic or abstract way without referring to the substance of the ideas. The CEO typically engaged in generic coaching when the employees mirrored or localized (see Table 2). Referring to the mirroring example at the beginning of the findings section, the following response by the CEO shows how he generically coached the employee (Donald):

But what does it mean? ... I think we should define ... things. Because otherwise, we don't really beat the strategy, we just continue doing what we do. Right? Which is not the purpose here. I think we should challenge what we do. (2nd CEO meeting, week 4).

Here, the CEO did not substantively engage with the specifics of the employee's idea but instructed him on how to develop it in a generic way ("we should define ... things"). Our analysis suggests that the CEO's generic coaching was typically not very helpful for the development of employees' discursive competence because it did not include specific instructions on the missing corporate or local themes or how to integrate them. In reaction to the CEO's generic coaching, employees typically continued with the less effective practices of localizing or mirroring (see the vignette below and Table A4 as evidence of the limited effectiveness of generic coaching). Generally, our analysis of Table A2 showed that only 13.5% of CEO's generic coaching instances led to employees integrating.

As well as generic coaching, the CEO engaged in *specific coaching*. When the CEO coaches specifically, he engages with the form of the employee's statement by indicating what particular themes are missing and how to relate the themes to each other, without engaging with the substance of the idea as such. One participant described specific coaching as follows:

[This type of] coaching is reflected in the way he asked questions...[For example] when he says "How do you want to do this precisely? How should this work? In China, how would you do this?" So, when he helps them to connect pieces or elements, ... which they did not notice. (Interview with a strategy officer, after the strategy process).

As shown in Table 2, the CEO mainly engages in specific coaching when employees parallel. Paralleling allows the CEO to engage in specific coaching as he sees the novelty of the proposed idea and the relevance for the corporate context, even though a coherent integration of the local and corporate themes is lacking. Paralleling does offer the necessary themes that allow the CEO to take the next step and coach employees specifically on how to increase coherence. Conversely, the CEO is usually unable to engage in specific coaching when employees mirror or localize. When employees localize, he struggles to connect their ideas to a corporate theme which he is familiar with; and when employees mirror, he struggles to connect their ideas to a local theme that would provide him with novel insights. The following quote contains an example of specific coaching to an employee's suggestion to offer junior underwriters the "opportunity to work cross-functionally" as was successfully done in his UK business,

But how do we do that? Because your P&L [part of the UK commercial business] depends on underwriters and claims people, right? ... But I'm not sure that this helps the underwriters [in general]. So, can you also think about how working in cross-functional teams would make them more motivated and happier to be with [us]? (CEO, 5th CEO meeting, week 10).

In this quote, the CEO specifically instructed the employee to integrate the local idea to work cross-functionally with the corporate theme of becoming an attractive underwriting company by asking how working cross-functionally would help "the underwriters in general." He thus pointed the employee specifically to the missing form of coherent integration between the local and the corporate theme. In contrast to generic coaching, the CEO's specific coaching was developmental for employees' learning (our analysis of Table A2 shows that 54% of all CEO specific coaching instances



led to employees integrating). Specific coaching helped employees to develop discursive competence and thus to enact the practice of integrating because the CEO's instructions allowed employees to specify how their local insights can be connected to the corporate themes. One employee reflected on the learning opportunities from specific coaching as follows,

[The CEO] is forcing us to actually get much more concrete on [our] ideas ... If I think about how to extract value, we now focus much more on how your idea works on a global level and how to make it strategic ... And that's something that is coming up in our solutions. [So] the process, it forces you to think about this idea in a more global and much more sophisticated strategical way. (Diary recording employee Max, week 15).

Further evidence for learning through specific coaching is provided in the vignette below and in Tables A2 and A4.

Overall, these findings provide an initial insight into how employees learnt from the different CEO reactions. However, consistent with the focus on continuous interactions in the DABV, we also analyzed how learning from the CEO's direct responses developed over more or less extended interactions, that is, chains of practice-response pairs. We found that employees did indeed learn from the continuous nudging of the CEO over several practice-response pairs. The following vignette provides an example of such learning through continuous interactions.

Continuous experiential learning (refers to 7th practice-response chain in Table A2)

In one of the CEO meetings, the employee group introduces their vision for the commercial business that is their topic. Adela kicks off the discussion of the future of the commercial business by proposing that, to improve profitability, the business needs a "consistent engagement model" with the brokers. By referring solely to the corporate theme of improving profitability, she thus practices mirroring. However, the CEO interrupts her immediately with generic coaching (response-pair 1).

But what does it mean? ... Look guys, ask the tough questions ... You need to start asking the fundamental questions. Right?

Uncertain how she should respond to this generic coaching, Adela makes another attempt at engaging the CEO's attention by referring to her local knowledge as underwriter in Spain (i.e., she localizes). In Spain, they have been reviewing the underwriter strategy with "an incapacity deployment," which helped to consistently engage with the brokers (response-pair 2). As the CEO does not respond to her localizing, Adela continues to localize. In turn, the CEO keeps coaching generically or offers no reaction.

But then, Adela responds to the CEO's repeated generic coaching by paralleling. Based on her local knowledge, she says that in Spain, they have been able to "clearly explain our risk appetite" and suggests that a consistent engagement with the brokers would help to improve the profitability of the commercial business. This paralleling allows the CEO to make more sense of Adela's suggestion and he engages in specific coaching by instructing her to provide a rationale for the link between the proposed idea and her local insights.



Sorry, can I stop you here? Let's give a value to words. What does it mean, consistent engagement with customers and broker? Can you qualify to me consistent and engagement? What is consistent?

Coaching specifically, the CEO asked Adela to specify “consistent” and “engagement” in order to understand how her local insights might connect to the corporate theme (the profitability of the business). However, Adela cannot process the CEO’s specific coaching immediately, which (after a no reaction) prompts the CEO to engage in specific coaching again. But Adela gets her wires crossed. She continues paralleling to which the CEO responds with specific coaching once more. The CEO’s continued specific coaching finally helps Adela to specify that underwriters in the company “lack the empowerment and accountability to decide on the appropriate tools,” based on her local knowledge (response-pair 8). Thus, after several attempts, she finally integrates the local and corporate themes, namely that deciding on the appropriate tools would allow them to consistently approach the brokers. As the appropriate tools allow for swift response to brokers, this would ultimately increase the Gross Written Premium. Finally, the CEO engages substantively with Adela’s idea as a reaction to her successful integrating practices.

So can you talk to that gentleman over there [points to the head of operations and IT, who is responsible for underwriting tools]? And start immediately looking at this!

In the end, the idea to increase underwriters’ empowerment to make their own decisions on appropriate tools was integrated as an “action point” in the final strategic plan.

This vignette provides a typical example of a continuous interaction in which the employee learns over a chain of practice-response pairs. We see how the employee initially struggles to grasp the CEO’s coaching and needs to rehearse the different practices, including the less effective ones, before she manages to elicit the CEO’s substantive attention. This practice-response chain is included in Table A2 (seventh chain) together with all other chains in our data set that lead to substantive attention by the CEO (which we called “developmental learning chains,” highlighted in Table A2; in contrast, Table A4 provides evidence on the non-developmental learning chains that do not lead to substantive attention). As illustrated in the vignette above, the developmental learning chains included in Table A2 show that often employees were only able to enact the practice of integrating, and thus to gain the CEO’s substantive attention, after several coaching attempts by the CEO. For example, in the seventh chain (illustrated in the vignette above), it took eight practice-response pairs before Adela attracted the CEO’s substantive attention for her idea, continuously employing rather ineffective practices before she finally managed to integrate with the help of the CEO’s specific coaching. In addition, Table A2 shows that employees could learn from previous interactions. More specifically, we can see that employees tended to raise the CEO’s substantive attention quicker (as indicated by the highlighted substantive CEO attention responses) in later chains because they more rapidly enacted the practices of integrating. For example, while it took eight practice-response pairs for Adela in week 2, by week 18 another employee could attract the CEO’s substantive attention in the first practice-response pair (104th chain in Table A2).



Focusing on practice-response chains also reveals that not all interactions are equally effective for employee learning.¹ Table 3 provides an aggregate comparison of *developmental learning chains* that include or lead to substantive attention with *non-developmental learning chains*, that is, those chains that do not lead to the CEO's substantive attention. Specifically, Table 3 compares the number of developmental and non-developmental learning chains, the average number of practice-response pairs for each type of chain as well as the percent of enacted employee practices and CEO responses for each type of chain.

As the aggregate comparison in Table 3 shows, in all the developmental learning chains taken together the CEO responded far more often with specific coaching (42.94% of all CEO responses) than in the non-developmental learning chain (26.67% of all CEO responses); correspondingly, the non-developmental learning chains contained far more of the less productive CEO responses (21.67% no reaction and 51.67% generic coaching) than the developmental learning chains (5.71% no reaction and 20.12% generic coaching). Thus, the comparison shows that experiential learning was more effective in those interactions that included more instances of CEO's specific coaching.

4.2.2 | Acquiring discursive competence through vicarious learning

The employees learnt not only through the direct and continuous interactions with the CEO but also through observing interactions between the CEO and other employees—that is, through vicarious learning. During the CEO meetings, those employee groups who were not discussing their ideas with the CEO were able to watch the interactions between the CEO and the employee groups who were presenting their ideas. We found that watching those interactions between the CEO and other employees could help the observing employees learn how to gain the CEO's substantive attention for their own ideas. For example, after the CEO meeting in week 16, an employee reflected on her failure to gain the CEO's substantive attention, comparing herself with other employees who had discussed their ideas successfully in the same meeting:

I'm not sure what went wrong with [my] message ... what came out was, I think it was universally accepted [that] it wasn't the best. That was a train wreck in there [in the CEO meeting]. But then these guys [who also discussed their ideas] you're kind of seeing ... how they hit this stuff and get it done These guys have discussed that [their ideas with the CEO]. (Interview with employee Lara, week 16).

Although not explicitly referring to learning, this employee states that she observed how other employees managed to communicate their ideas in ways that attracted the CEO attention and made him discuss those ideas with them. The head of strategy explains how observing others' interactions can contribute to vicarious learning:

They [the employees] imitated how to present [as they had] seen by the others ... This way they learned a lot from each other, [such as] what works in the

¹While all 114 chains included in our data set vary in terms of sequence of practices and length, and not all of them exactly follow the logic outlined here (that the employees' practice of integrating necessarily leads to CEO substantive attention), they generally show that not all chains are equally effective for employee learning.



interaction with [the CEO], where does he say it makes sense or where do they get push back. (Interview with head of strategy, after strategy process).

This observation was also shared by another participant, who described vicarious employee learning as follows:

It was a good idea that all of them [the employees] were present in the same room. On the one hand this allowed them to see how others present their ideas, what works and what doesn't work So they learned how to present by watching the others presenting. [On the other hand], I think it helped them tremendously not only to watch their colleagues [but also] to watch the reactions by [the CEO]. In this way they were able to watch the dynamics [between the employees and the CEO]. (Interview with a strategy officer, after strategy process).

In addition, the finding that employees also developed discursive competence through vicarious learning is consistent with Table 4, which shows in which (on-site) week of the strategy process the eight employee groups started to discuss their ideas with the CEO and how often the employees in these groups enacted each discursive practice.

Table 4 reveals that those employee groups that could observe other employees' interactions before they started to discuss their own ideas with the CEO, acquired discursive competence faster than those who discussed their ideas earlier. For example, it took late groups 7 and 8 six weeks (14–20) to be using integrating practices more than half the time (54%), while early groups 1–6 took 12 weeks to reach a similar proportion (52%). While all employees began predominantly with mirroring and localizing before transitioning to paralleling and integrating, the transition between those practices, and thus employees' vicarious learning, was faster the more the employees had the opportunity to observe other groups' interactions with the CEO. For example, in their fourth week employee groups 1–4, who were the first to directly interact with the CEO, were still using mirroring and localizing practices, while groups 7 and 8, who were able to observe the interactions with the CEO of all other groups until week 14, had dropped mirroring entirely by their fourth week already (week 20 in Table 4) and substantially reduced localizing. Indeed, by their fourth week, groups 7 and 8 were already enacting the practice of integrating to an extent not achieved by groups 1–4 until their seventh week. Not only could those later groups observe more CEO interactions with the earlier groups before they started to interact with him themselves, but they could observe more of the developmental learning interactions, which happened more frequently in the later stages of each group's interactions (as can be seen in Table A2). Thus, by the time the later groups started, they had both seen not only more CEO interactions but also more of the developmental learning interactions, which contain more instances of CEO's specific coaching and thus more information on how to successfully communicate ideas. Therefore, those later groups had greater opportunities for vicarious learning, which can explain why they learned faster than the earlier groups. Thus, not all vicarious learning opportunities are the same: vicarious learning may be more effective when employees can observe the learning that the earlier groups had already accomplished. Additional evidence for employees' vicarious learning can be found in Table A4.



5 | A PROCESS MODEL OF DISCURSIVE COMPETENCE DEVELOPMENT

In the following, we integrate the different insights from our study into a process model (see Figure 3) that describes two interaction-based processes through which employees may develop the discursive competence required to gain senior management attention for their ideas: a process of experiential learning (on the right) and a process of vicarious learning (on the left).

The experiential learning process starts with *discursive competence* (1) defined as the ability to coherently integrate corporate and local themes. Depending on their degree of discursive competence, employees enact different discursive practices. If they lack or have very little discursive competence, as the employees initially in our case, they are likely to enact the practices of *mirroring* or *localizing* (2). Because mirroring or localizing contains respectively just corporate or local themes, senior management has difficulty in understanding either the novelty or the relevance of the statement. Thus, they might either show *no reaction* (3) or react with *generic coaching* (4). Generally, the employees use the information contained in senior management's responses as a means for *experiential learning* (5) of discursive competence.

If the senior management shows no reaction, employees receive no information on how to create coherence, apart from the fact that the enacted practice (to which senior management showed no reaction) is not effective in gaining substantive senior management attention. If the senior management coaches generically, employees receive some information but little on how concretely to create coherence. Accordingly, there is limited experiential learning from these two types of reactions and, therefore, the discursive competence increases only marginally, that is, the employee might only be slightly better able to link corporate and local themes. Even so, this increase in discursive competence might be enough to move on to the more effective discursive practice of *paralleling* (6). However, as paralleling does not coherently link themes, senior management is still struggling to fully understand the employee's statement in a way that would allow substantive attention. Yet, senior management may understand the contribution

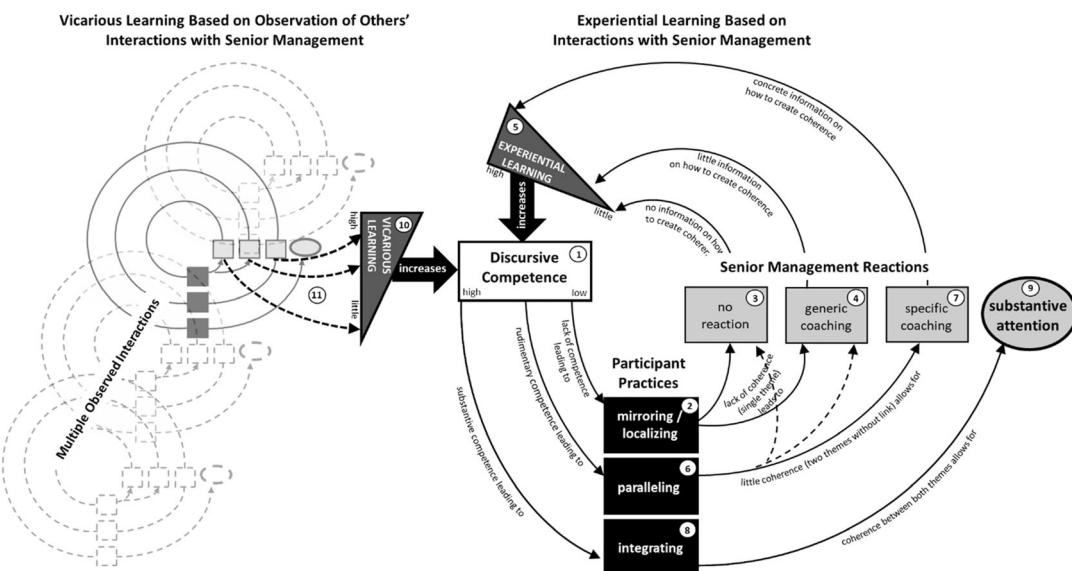


FIGURE 3 Model of discursive competence development.

well enough (as both local and corporate themes are provided) to be able to offer *specific coaching* (7), that is, giving concrete instructions on how to create coherence (as indicated by the dotted arrows, senior management might still offer just generic coaching or show no reaction, e.g., because it takes less effort). Specific coaching provides the potential for a high degree of experiential learning because it contains concrete information about how to create coherence, from which the participant can learn much more effectively. Thus, this instance of learning from specific coaching will boost the acquisition of discursive competence. Because of the increased degree of discursive competence, the employees might be able to switch to the most effective discursive practice of *integrating* (8). As the practice of integrating coherently links local and corporate themes, the senior management can understand the employee's statement and therefore is likely to pay *substantive attention* (9).

In addition to this experiential learning process, under the right conditions employees can also acquire discursive competence through *vicarious learning* (10). That is, employees can learn from observing how other employees interact with senior management. Such multiple observed interactions are symbolized by the simplified (dotted) spirals on the left side of Figure 3, representing analogous processes of experiential learning of the other employees. The simplified spirals contain only the interplay between the enacted discursive practices and the senior management responses to them, as this is all that can be seen by the onlooking employees observing the interactions (because onlooking employees cannot observe other employees' experiential learning as such). By observing the discursive practices of other employees as well as the respective responses by senior management, an employee can learn about practices that are effective in eliciting senior management substantive attention and those that are not. Analogously to how employees can learn from direct interaction with the CEO, the degree of vicarious learning is likely to vary depending on the CEO reactions, which is indicated by the black dotted arrows on the left (11). The more information on coherent integration the observed CEO responses contains, the better the chances for vicarious learning (i.e., observing specific coaching is more effective than generic coaching; and observing generic coaching is more effective than no reaction). We could not observe these variations in vicarious learning directly in our data but inferred this from our observations of variations in experiential learning. Participants who draw on both experiential learning and vicarious learning might acquire discursive competence faster than those who draw only on either of the two forms of learning. This is symbolized in Figure 3 with the two arrows from experiential learning and vicarious learning respectively pointing to discursive competence. It is this discursive competence to gain substantive attention that may unleash the potential of employee participation leading finally to strategic impact.

6 | DISCUSSION AND CONTRIBUTIONS

This study is motivated by recent trends toward inclusive strategy processes and the disappointing outcomes that they sometimes engender (Dobusch et al., 2019; Neeley & Leonardi, 2018). We analyze a high-profile inclusive strategy process launched by the new CEO of a large multinational under pressure from investors. Two months into the process, the CEO was frustrated and distracted. The CEO attempted to coach participating employees, but a lot of his coaching was too generic to be effective. Eventually, the employees learnt to shift their discourse from imitative mirroring or narrow localizing toward a coherent integration of their specialized knowledge with the corporate themes familiar to the CEO. The learning of this discursive competence came partly through the direct experience of communicative interactions with the



CEO, often in extended chains. Here, the CEO's specific coaching was more helpful than generic coaching. But learning also came inadvertently from the design of the process, with some groups obliged to observe while they waited their turn. This vicarious learning substantially accelerated the employees' learning process. In the end, by developing the discursive competence to integrate local and corporate themes, the employees managed to gain the substantive attention of the CEO. The final strategic plan incorporated 12 of the employees' ideas and the plan's presentation was greeted positively by investors with an increase in share price of three percentage points.

Our study thus has four key findings. First, employee participation can be effective in inclusive strategy processes, but this relies on their having the discursive competence to be heard by senior managers. The inability to articulate strategic ideas in a manner that integrates local and corporate themes is a potential fail-point in inclusive processes. Second, acquiring this discursive competence may come from both experiential and vicarious learning, with the latter accelerating the former. Third, senior managers have an important role as coaches in this learning, but they should emphasize specific coaching more than generic coaching. Finally, senior managers may need patience to persist both through extended interactions of repeated practice-responses pairs and across successive interaction episodes over many weeks or months. We capture these findings in a model of discursive competence development (Figure 3) that emphasizes both kinds of learning and the critical role of senior management coaching. These findings contribute to the ABV, especially the DABV, to research on issue selling and to the emerging literature on inclusive or "open" strategy processes. We will discuss these contributions in turn.

The ABV originally treated organizational communication channels as "pipes" for the flow of information from one point to another (Ocasio, 1997; Ocasio & Joseph, 2005). The DABV introduces a focus on the continuous communicative interactions that occur within these pipes (Brielmaier & Friesl, 2023; Ocasio et al., 2018). We add learning to the role of communications in these interactions. Communicative interactions should be recognized not only as shapers of attention but as potential sites for learning. Such learning can enlarge the original capacity of communication channels: communications within the pipes become richer and more effective. In other words, communicative interactions are not only dynamic in themselves, as the DABV establishes; through learning, these interactions endow channels with their own dynamics. Rather than fixed by external design, as assumed in the original ABV (Ocasio, 1997), learning implies that channels can be expanded through the internal interactions that take place within them. This implies for the ABV that communication channels should be designed with an eye to learning as well as communication. For example, designing-in opportunities for feedback by senior managers or vicarious learning by employees might seem redundant or inefficient from a simple communications point of view but is important if the learning of discursive competence is also a consideration. Indeed, the value of vicarious learning argues for transparency as a design principle for communication channels, allowing for observation from the sidelines. Observers of communicative interactions are potential learners, not just passive bystanders. Communications channels capacity can be expanded not just by adding more "pipes" but by making them more transparent.

The interactive learning emphasized in our study extends the responsibilities of the various actors involved in issue selling. Much of the issue-selling literature puts the emphasis on the issue-sellers and their capacity to bundle issues effectively (Dutton et al., 2001; Ashford et al., 2017; Wickert & de Bakker, 2018). Even where issue-selling research highlights learning through interactions over time (Howard-Grenville, 2007), this is primarily a responsibility of the issue-sellers: senior managers are depicted as largely passive recipients of sellers' moves, their contribution to the interactions limited to issue acceptance or rejection. Our study takes



from the DABV (Ocasio et al., 2018) a more fully interactive perspective, with senior managers active partners in how sellers learn to gain attention for their issues. Senior managers can act as coaches for issue-sellers, whether in inclusive strategy processes such as in our study or in more conventional strategy processes of middle manager upward influence. Simple rejection of an issue can be considered a missed opportunity to coach and thus to contribute more effectively to issue-sellers' learning. We therefore emphasize the reciprocal responsibilities of those involved in issue selling. To ensure that potentially important issues reach the strategic agenda, senior managers should recognize their own responsibility for developing the competences of issue-sellers working at lower levels of the organization. Our interactive perspective adds to the issue-selling literature an active role for issue-recipients as well as for issue-sellers.

This role of issue-recipients also suggests the importance of attention quality (Ocasio et al., 2023), which we define here as the effortful understanding that allows productive responses in communicative interactions. The distinction between quantity and quality of attention adds to the DABV because the second is more effective at promoting the dynamic evolution of interactions in a positive direction. Top manager feedback in the form of generic coaching may initially require more or less the same amount of attention as specific coaching (as measured by discursive length), but it involves a more superficial engagement with employee contributions, focusing on presentational aspects. Specific coaching is higher quality in that it demands effortful understanding of the content of employee contributions. As in Figure 3, it is specific coaching that provides the concrete information allowing employees to progress toward more coherent, integrative practices. Attention in the form of generic coaching is largely a dead-end and just increasing its quantity is likely to be of little help. Although the distinction between quantity and quality of attention is not inherent to the ABV tradition (Joseph et al., 2024), it is attention quality that matters most in the communicative interactions of the DABV. In the DABV, top management attention is not just an outcome, as in the original ABV, but a necessary input to ongoing communicative interactions where attention quality is critical to their effectiveness. Understanding evolves continuously in the course of these interactions, requiring persistent effort on the part of top managers, especially when actors employ different discourses, as for instance in the cases of open strategy or middle management issue selling (Dutton et al., 2001; Seidl et al., 2019).

Finally, our study contributes to the understanding of discursive competence in more inclusive or "open" modes of strategizing (Hautz et al., 2019; Seidl et al., 2019; Stadler et al., 2021). This literature highlights that many inclusive processes do not realize their intended benefits or even fail, often because lower-level participants fall short in some way (Brielmaier & Friesl, 2021; Dobusch et al., 2019; Neeley & Leonardi, 2018). We propose that participants' discursive competence is critical to the success of inclusive strategy initiatives. As already remarked, the acquisition of this discursive competence can come through both experiential and vicarious learning and be accelerated through senior management coaching. Communication channels can be designed to enhance learning and allow opportunity for coaching. In this sense, although strategy discourse might appear exclusionary (Mantere & Vaara, 2008), even within intendedly inclusive processes, it is not irredeemably so. The competence necessary to master this discourse can be learned through continuous interactions over time. When inviting the participation of novice strategists, inclusive strategy processes are therefore likely to demand comprehensive investments in learning if intended benefits are to be realized. Allowing participants the opportunities required to internalize strategy discourse may forestall the failure or premature abandonment of inclusive strategy processes.



7 | BOUNDARY CONDITIONS AND FUTURE RESEARCH

In conclusion, we extend the Dynamic ABV (Ocasio et al., 2018; Ocasio et al., 2020; Plotnikova et al., 2023) by highlighting how communicative interactions have a double dynamism—first of communications, second of learning. Recognizing the role of learning can amplify the communication channels of the original ABV (Ocasio, 1997) at the same time as giving the recipients of issue selling (Dutton et al., 2001) a larger responsibility as active coaches. This combination of learning and coaching promises to moderate the exclusionary aspects of strategy discourse and thereby improve on the sometimes disappointing outcomes of inclusive strategy processes (Dobusch et al., 2019). Of course, our study has boundary conditions, but these themselves raise further opportunities for research.

A first boundary condition concerns the composition of employees participating in the strategy process which might have affected the learning dynamics. For instance, in our case senior management selected only highly motivated employees for the strategy process, which might have affected the speed with which employees acquired discursive competence. The learning dynamics might also have played out somewhat differently if participants with prior experience in corporate strategy making or with higher levels of English language skills had been included in the strategy process, which would most likely have increased the speed of learning. Shorter company affiliations of the employees, in turn, might have impeded the learning process since those employees might not have sufficient local knowledge hindering their ability to integrate and thus to attract the CEO's attention. Hence, future research might examine how differences in composition of participants affect participants' learning paths.

A second boundary condition arises from the face-to-face (or “analog”) nature of the strategy process we observed (Baptista et al., 2017; Brielmaier & Friesl, 2023). This context allowed employees to stay in close contact and exposed them to the vivid learning opportunities of in-person presence. Again, this context may have accelerated learning. However, many inclusive strategy processes, such as strategy jams, are digital, with less opportunity for vivid personal feedback (Bjelland & Wood, 2008; Neeley & Leonardi, 2018). Thus, future research could compare the development of discursive competence—and by extension potentially also interactional competence (Balogun et al., 2015) more generally—in digital and analog inclusive strategy processes and explore alternative modes by which digital processes can promote participant learning.

Finally, the DABV's highlighting of communicative interaction (Ocasio et al., 2018) points to the potential for reciprocal learning between senior managers and other employees in inclusive strategy processes. In our case, we did not observe significant CEO learning, perhaps because it was the second time that the CEO had engaged in an inclusive strategy process and thus, he had already gained experience with such processes. However, in other inclusive strategy processes, reciprocal learning between senior managers and other employees might occur, especially if it is the first time that the senior managers engage in wide participation. Accordingly, future research could examine senior management learning in terms of changes in their coaching practices, and how these might affect employee learning. Given its growing prevalence, its liability to disappoint and its high stakes nature, CEOs too need to learn how to manage inclusive strategy.

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DATA AVAILABILITY STATEMENT

Data available only on request due to privacy/ethical restrictions.

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APPENDIX

TABLE A1 Included employees.

Employee group	Pseudonyms	Age	Gender	Function	Business education	Level (out of 6)
1	Donald	32	Male	Head of commercial insurance	X	3
	Izmael	36	Male	Senior Assistant General Counsel	X	1
	Adela	28	Female	Senior underwriter	X	2
	Rufus	29	Male	Head of commercial insurance	X	3
	Christian	30	Male	Senior Assistant to COO	X	1
	Rudolph	31	Male	Head of Digital Partnerships	X	1
2	Liam	36	Male	Head of commercial customers	X	2
	Chantal	34	Female	Market Customers Manager	X	1
	Muhammed	32	Male	Competitive Intelligence Analyst		1
	Henk	38	Male	CCO Argentina	X	3
	Vincent	28	Male	Head of Direct & Digital Transformation	X	2
	David	33	Male	Claims Development Manager	X	1
3	Ryan	34	Male	Senior underwriter		2
	Helen	30	Female	Head of In-force Management	X	2
	Erin	26	Female	Head of Portfolio Management	X	2
	Fatima	27	Female	Senior Manager Partnerships	X	1
	Penelope	28	Female	Senior Financial Analyst	X	2
4	Silvan	28	Male	Global financial pricing lead		3
	Jean	30	Male	Digital Marketing Manager	X	1
	Claudia	26	Female	Head of claims	X	2
	Craig	32	Male	Senior Assistant to COO	X	1
	Mary	38	Female	Head of Customer & Market Insights	X	2



TABLE A1 (Continued)

Employee group	Pseudonyms	Age	Gender	Function	Business education	Level (out of 6)
5	Hans	28	Male	Senior Market Underwriter		2
	Udo	30	Male	Reinsurance Analyst	X	1
	Ivan	35	Male	Head of strategy Mexico	X	3
	Jeremy	34	Male	Senior Lawyer Legal & Compliance		2
	Wendy	29	Female	Surety Underwriter	X	1
6	Boris	30	Male	Head of retail	X	3
	Abdal	27	Male	Business Analyst	X	1
	Paul	30	Male	Risk & Insurance Consultant	X	1
	Lara	31	Female	Head of General Insurance	X	2
7	Max	29	Male	Chief claims officer	X	2
	Bob	32	Male	Underwriter	X	1
	Valerie	28	Female	Senior Assistant Commercial	X	1
	Gerardo	34	Male	Global head of product development	X	3
8	Freddy	34	Male	Chief underwriter officer	X	2
	Robert	32	Male	Chief Pricing Actuary	X	2
	Susan	29	Female	Programme Manager	X	1
	René	28	Male	Chief Risk Officer	X	2
	Melanie	26	Female	Senior Business Analyst	X	2

TABLE A2 Developmental and non-developmental learning chains.

Number of practice-response pair		1		2		3		4		5		6		7		8		9		10	
Week	Number of chain	E	CEO	Outcome ^a																	
2	1	1	0	1	1	2	1	3	2	2	2	4	3								
2	2	1	0	2	1	1	1	2	1	2	2	4	3								
3	2	0																			
4	1	1	2	0		2	1	2	1	2	0										
5	2	0																			
6	2	0		2	1	2	1	3	2	2	1	3	2								
7	1	1	2	0		2	1	3	2	2	0										
8	2	0		2	1																
9	2	0																			
10	1	1	2	0		2	1	2	2	1	1	2	0								
11	2	0		3	1																
12	3	2		2	1	2	1	2	1	2	0										
13	1	2		2	0	2	1	2	1	2	1										
14	1	0		2	0																
15	3	1																			
16	1	0		2	1	2	2	2	2	4	3										
17	1	0																			
18	2	1		3	2	3	2	3	2	3	2	3	2								
19	1	0		2	1																
20	2	0																			
21	1	0		2	1	3	2	2	1	3	2	3	2	3	2	3	2	3	2	3	



TABLE A2 (Continued)

Number of practice-response pair		1	2	3	4	5	6	7	8	9	10					
Week	of chain	E	CEO	Outcome ^a												
22	2	1	2	1	2	0	2	1	3	2	2	1	4	2	3	2
23	1	1	2	0	2	1	2	2	2	1	2	1	3	2	2	1
24	1	0	2	1	1	1	2	1	2	1	2	0				
25	2	0														
6	26	2	1													
27	1	1	2	1	1	1	2	1	3	1	2	1	3	2		
28	1	1	2	1	2	1	2	2	2	1	4	2	3	2	2	1
29	2	2	2	1	2	1	3	2	4	2						
30	1	0														
31	2	1	2	1	2	1	3	2	2	1	2	1	2	1	3	2
32	3	1	4	0												
33	2	0														
34	1	1	2	1	2	1	3	2	2	1						
35	2	1	2	2	3	2	4	3	2							
36	1	0	2	1	2	0	3	2	2	1	2	1	2	2	3	2
37	2	0	2	1	3	2	4	2	4							
38	3	2	3	2	1	1	2	1	3	2	4	2				
8	39	1	1	3	1	2	1	2	1	2	1	3	2			
40	1	1	1	2	1	2	1	1	2	1	2	1	3			
41	2	0														
42	3	2	2	1	2	1	3	2	2	1	3	2	4	2	4	3

X



TABLE A2 (Continued)

Number of practice-response pair		1	2	3	4	5	6	7	8	9	10
Week	of chain	E	CEO								
43	3	0	1	1	1	2	0	2	1	2	4
44	2	0	2	0	3	1					
45	2	1	3	0							
46	2	0	2	0							
47	2	1	2	1	3	2	3	0	3	2	4
48	3	2	3	2	2	1	4	3			
49	1	0	2	1	4	2	2	1	2	1	3
50	2	0									
10	51	3	2	3	2	4	2	3	2	4	3
52	1	0	2	1	2	2	1	3	2	1	3
53	1	1	2	0	2	1	2	1	3		
54	1	0	2	0	2	0					
55	2	2	2	1	2	1	2	1	2	1	3
56	2	1	2	1	3	2	3	2	4	2	
57	3	2	2	2	3	2	3	1	3	2	4
58	4	3	3	2	3	3	2	3	2	0	3
59	1	1	3	2	3	2	2	2	3	2	4
60	2	0	4	1	1	2	1	4	2	1	3
61	2	1	1	1	2	1	4	2	2	1	2
62	2	0									
63	3	1	3	2	4	2	4	2	4	2	

X



TABLE A2 (Continued)

Number of practice-response pair		1	2	3	4	5	6	7	8	9	10
Week	Number of chain	E	CEO								
64	3 1	2 1	2 2	2							
12	65 2 0	2 1	3 2	3 2	4	2	3	2	4		
66	2 1										
67	2 1	3 1	2 1	3 2	4	2					
68	2 2	4 1	1 0	3 2	3 2	4	3 4				
69	2 0	1 0	3 1								
70	1 0	2 0	1 1	2 1	3	2	3 1	4	2	3 2	4
71	3 2	2 2	2 2	4 3	3 2	2	2 2	2	3	4 3	4
72	3 2	2 2	1 2	1 2	1 4	1	3 1	4	2	3 2	
73	2 1	2 1	3 2	3 1	3 2	4	2	3			
74	2 0	3 1	4 2								
75	3 2	3 2	1 1	3 2	4	3 4	3 2				
14	76 1 1	1 0	3 2	2 2	3 2	3 4					
77	1 1	2 1	3 2	3 0	3 2	3 2	4	3	3	4	3
78	3 2	3 2	3 2	4 3	2 1	3 2					
79	1 0	2 1	3 1	3 2	4 3	4	3	3	2	3	
80	2 2	2 2	4 2	4 2	4 3	4	3	4	3	4	
81	2 1	2 2	3 2	4 2	3 2	3 2	3	2	4		
82	3 2	2 1	3 1	2 1	3 2	4 3	2 4	3	2	4	
83	3 1	2 1	1 2	2 2	2 4	3 4	2 4				
84	2 0	1 0									
85	2 1	2 1	3 2	2 1	3 2	2 1	3 2	2 1	3 2	4	



TABLE A2 (Continued)

Number of practice-response pair		1	2	3	4	5	6	7	8	9	10
Week	of chain	E	CEO								
16	86	2	1	2	1	3	2	4	3	4	3
	87	3	2	1	1	2	2	4	3	2	4
	88	2	1	3	2	2	2	4	2	4	3
	89	4	2	3	2	3	2	3	3	4	4
	90	1	0	2	1	1	1	2	1	0	
	91	1	1	2	1	2	1	2	1	2	
	92	4	3	2	3	3	2	3	2	1	
	93	3	2	4	3	4	3	1	3	1	
	94	2	2	4	2	4	2	4	3	2	
	95	4	2	4	2	3	2	4	3	2	
	96	4	2	4	3	3	4	3	4	2	
	97	3	2	2	2	3	2	2	1	3	
	98	2	1	2	0						
	99	4	3	4	3	4	2	2	1	1	
	100	4	2	4	3	4	3	3	2	3	
	101	3	2	3	2	1	2	0	3	3	
	102	3	0	2	1	4	1	3	2	4	
	103	2	1	2	1	3	2	2	1	3	
	104	4	3	4	2	4	3	2	1	3	
	105	4	3	4	3	2	1	2	1	3	
18											

TABLE A2 (Continued)

Number of practice-response pair		1	2	3	4	5	6	7	8	9	10
Week	of chain	E	CEO								
Number											
20	106	3	2	4	3	2	1	2	3	3	2
	107	4	3	3	2	4	3				
	108	2	1	2	0	3	2	4	2	3	
	109	4	3	4	2	2	1	2	3	3	
	110	3	2	2	2	3	2	3	2	4	3
	111	4	2	3	2	2	1	4	3	4	4
	112	3	2	4	3	4	3	3	2	3	
	113	4	3	4	3	2	1	4	2	4	
	114	2	1	4	3	3	2	2	2	4	

Note: Employees (E): Mirroring (1), localizing (2), paralleling (3), integrating (4). CEO (C): No reaction (0), generic coaching (1), specific coaching (2), highlighted: substantive attention denoting a developmental learning chain (3).

^aA cross in the respective chain signals whether the discussed idea was included in the final strategic plan.

TABLE A3 Employee practices and corresponding CEO reactions at the beginning and at the end of the strategy process.

	Week 2	Week 4	Week 18	Week 4	Week 18	Week 20
Employee practices	Number of employee practices	% of CEO reactions	Number of employee practices	% of CEO reactions	Number of employee practices	% of CEO reactions
Mirroring	6	0.22	No reaction	6	0.67	No reaction
	0.78	Generic coaching	0.22	Generic coaching	0.5	Generic coaching
	0	Specific coaching	0.11	Specific coaching	0	Specific coaching
	0	Substantive attention	0	Substantive attention	0	Substantive attention
Localizing	19	0.48	No reaction	21	0.24	No reaction
	0.44	Generic coaching	0.67	Generic coaching	0.71	Generic coaching
	0.08	Specific coaching	0.09	Specific coaching	0.14	Specific coaching
	0	Substantive attention	0	Substantive attention	0	Substantive attention
Paralleling	5	0	No reaction	8	0	No reaction
	0.13	Generic coaching	0.08	Generic coaching	0.1	Generic coaching
	0.88	Specific coaching	0.92	Specific coaching	0.75	Specific coaching
	0	Substantive attention	0	Substantive attention	0.15	Substantive attention
Integrating	2	0	No reaction	4	0	No reaction
	0	Generic coaching	0	Generic coaching	0	Generic coaching



TABLE A3 (Continued)

	Week 2	Week 4	Week 18	Week 20
0	Specific coaching	0.33 Specific coaching	0.3 Specific coaching	0.18 Specific
1	Substantive attention	0.67 Substantive attention	0.67 Substantive attention	0.82 Substantive attention



TABLE A4 Additional evidence.

Experiential learning	Developmental learning chain (no. 90 in Table A2)	<p>In the CEO meeting in week 16, the employee group working on ideas in the partnership sector introduces their idea to deliver a more sustained growth in the bank assurance sector. Initially, Max mirrors the corporate themes of growth and a more innovative corporate culture.</p> <p>I think that...bank assurance...is a business that could be...delivering a more sustained growth...which is something relevant in terms of a strategy going forward. Also...it would strengthen [the company's] entrepreneurial innovative culture within the organization.</p> <p>However, the CEO states that this is not a novel idea, reacting to Max's statement with generic coaching. No, because I know these stories...And I heard the stories also [at other companies]. Beautiful stories, right? The problem is that these stories won't help us to succeed.</p> <p>Max needs some time before he engages in another attempt at gaining the CEO's substantive attention for their idea. More specifically, Max refers to his local expertise in the German bank assurance sector, thereby engaging in the practice of localizing.</p> <p>We [in the German business unit] have a direct bank assurance model...but we didn't really push [this model]. So...a direct model can be powerful [for the bank assurance sector across the businesses]</p> <p>because it's a lot less effort.</p> <p>As the CEO does not react to Max's localizing effort, Max continues with paralleling; he refers to his local expertise in the German business unit again as well as on the corporate theme of sustained growth but without providing a rationale of how the two themes are linked.</p> <p>From my experience [in the German business unit] the direct [model] is a price pay, it is highly dependent on expense... Now, [in the future we should thus] offer seamless interactions through the direct model [because] the banks won't make a difference between interaction, and sales, and contact as we experienced in Germany... So, we need to have a flexible solution, [which] is going to be critical for sustained growth in this sector.</p>
		<p>In response to Max's attempt to explain how sustained growth in the bank assurance sector could be reached based on paralleling, the CEO engages more directly with the form of Max's statement, thereby providing specific coaching indicating how to relate the themes.</p> <p>So you should have asked yesterday [when the global head of bank assurance gave a speech to the employees], "What is then the result of having introduced the direct model globally? How does it contribute to our growth [in the bank assurance sector]?"</p> <p>Responding to the CEO's specific coaching, Max initially engages in paralleling again.</p> <p>We didn't have it [the direct bank assurance model in the German Business unit] in the past, and I think we moved away from the previous model because some issues existed [that] led to a situation where</p>

TABLE A4 (Continued)

there was no growth. So, from my experience [as chief claims officer] this can be very easily engineered...So that's why we suggest [sustained] growth in the [bank] assurance [sector].

As Max still engages in paralleling, and thus not showing how the local and the corporate themes are linked, the CEO replies again with specific coaching.

But why do you think this is the case? ...I mean, it's probably...10 years that we tried to make [the direct] model functioning? And it had never been functioning. How does it add to our growth? ...Honestly, I'm not convinced that it will work elsewhere [beyond the German Business unit]. And if it is effective in one place it is because a miracle we found [because] it's like friendship between the US and Russia, I mean, which you believe that one day will exist? I don't.

After the CEO had engaged in several attempts to coach the employees specifically, Max finally engages in integrating by showing how the corporate theme of sustained growth is linked to the local theme of having a direct model in the bank assurance sector.

For me [as an employee of the German Business unit] there is a problem in how we acquire [bank assurance] deals [in the company]. But [with Germany] we have an example where there were several deals fixed because of the direct model. [The way it works in Germany could be] expanded to 28 countries, but the way [the other countries] would go about today is asking each individual country, "Can you provide that cover [for each deal]?" And it takes very long to get the response. We suggest one [global] direct model [which] has the ability to actually secure more deals and also [the] capability to make [the responses] more agile.

As Max finally managed to integrate the themes, the CEO shows the willingness to seize their idea, thus engaging in substantive attention.

I think it's an absolutely valid...I absolutely agree. Do we have the data? ...It solves many of our issues. But I think it's more complicated than that because even if you had all the correct data, to make it meaningful it has to be linked to our growth targets...so you could really dig into the data... Yeah, let's give it a try but I think we have to come up with something meaningful.

Max confirms that their group will further develop their idea, engaging once more in paralleling. Yes, and we [in our employee group] believe that in order to have a successful bank assurance [sector] in the future, we need more scale [with the direct model].

In the 2nd CEO meeting in week 4, Rufus suggests to the CEO to have a holistic customer solution by referring to the corporate theme of "future success," thereby engaging in mirroring.

Non-developmental learning chain
(no. 24 in Table A2)

TABLE A4 (Continued)

The customer is going to demand greater flexibility, so they're not going to care about when they come into us, who they speak to, which part of the business. So [we need to] have a flexible but holistic customer solution, [which] is going to be critical to success in the future.

As the CEO looks on his mobile phone, not reacting to what Rufus has said, Rufus makes another attempt at gaining the CEO's substantive attention by referring to his local Spanish business unit, thus engaging in localizing.

We really try to understand what people [the customers] are looking for. And [the holistic costumer solution is] really rooted in basics as we've found in the commercial space. [In the Spanish business unit] we see a clear articulation of risk appetite and by proactively...satisfying the costumers, we were able to increase the conversion rate and double that, from 10 to 20%. So there is something to look here and apply that [on the global level] as well.

While the CEO had listened to Rufus' explanation of the relevance of a holistic costumer solution, he just replies by engaging in specific coaching.

Yeah [but] if ... someone comes...and says, "What is [the company] doing?" We should have an answer for that, right, which is a simple plan in all of these things, right? And it's not a specific problem, it's not a specific solution...it's something you can say in the elevator... right? And this is what we're lacking. So what do we do with corporate and commercial [businesses in the future] and why is [the company] unique? What is [the company] doing?

Rufus looks puzzled as he seems to be unable to immediately provide an answer to these big questions. Instead of replying directly to the questions raised by the CEO, he engages again in mirroring in order to gain the CEO's substantive attention for the employee group's idea.

Across the [corporate and commercial] business, there's no clear service catalogue, the [criteria] are not clearly defined, quality control needs to get better, and so forth. That's all something [related to providing a holistic costumer solution] which we need to put in place to make [the company] more efficient and profitable.

The CEO interrupts Rufus' renewed attempt at gaining his substantive attention by engaging again in generic coaching.

Sorry to interrupt you, but I mean, why do we answer question that have been answered before? I mean, nobody in our organization is going to talk to customers, okay. So you want to do corporate and commercial, you have to be every day with the customers. But we are every day in each other meetings. How do we change this culture? How do we free up time, mind space, priorities to be every day with the customers...? ...and how we manage to do that? ...I mean, you want to do business with Samsung,

TABLE A4 (Continued)

you have to be at the head [quarter] of Samsung every week...I think Samsung is the biggest client worldwide we have. I don't know if you ever asked yourself, 'Who is the biggest single customer we have worldwide?' What I found so far that it is Samsung. I am not aware that any [of our] executive [has] been in the Samsung offices...None of us has been...to Korea head [quarter]. I mean, [if] you want to play this game, you have to be every day with the customers. How can [the company] be every day with the customers? I mean, think about the new things that we can do. But don't forget that if we want to convince people of being successful in corporate commercial, we have to respond with, "How do we overcome the challenges that we have today?"

Now Rufus looks even more puzzled. He cannot help but referring to his local business unit, thus engaging in localizing again.

I know that some of our best people [in the Spanish commercial sector], they're with the customers, they're with the brokers...And so [with regard to holistic costumer solution] we believe that in order to have a successful [commercial] business within [the company] in the future, we need more of a holistic solution.

As the employee still engages in localizing, the CEO makes a final attempt at coaching him, however just generically.

Be honest with my question ["How do we overcome the challenges that we have today"], because by the way we run the business today, by the culture we have we can't be with the customers...And please, be honest with this...you [the employees] have a natural tendency of saying, "What we do today...is right." If you start with that, we're not doing what we're supposed to do. Again, as I told you before, you can change everything and you have to be courageous and honest in what you think because if you come and say, "Yeah, I mean, we have to provide a holistic solution." I mean, guys, sorry, this company would be as bad as it is today, and it is bad today...It's not a joke. So, again, be honest. It doesn't work the way it is today.

Rufus sticks to his guns in trying to gain the CEO's substantive attention for their idea. Specifically, he refers again to his local business unit, engaging again in localizing.

I come from the commercial business. I'll be honest with you..."The main priorities here is to protect the health of our books. Apparently, last year, 50% of our large losses [from the costumers in Spain] did have a risk engineering visit. So it might be possible to close the gap [by] including [in the holistic customer solution] what you can call the Uber of risk engineering, which is essentially leveraging low-

TABLE A4 (Continued)

cost contractors of demand [...] it could be college students that have an iPhone and go the customers and connect risk engineers from the home office and make a risk inspection.
As the CEO had started to type on his mobile phone again, thus not reacting to Rufus' statement, the head of strategy says after a while:
I think let's take the steer overall...we need to move on.

Vicarious learning

I think by this time [in the middle of the strategy process], we were at different stages of maturity, [our employee group was] less advanced. Now, we have seen that some of the ideas [that other groups had discussed] didn't stay at the level of the company...And so, we're thinking they managed to build things up and we [our employee group also] need some of these concrete things...to spark new things [i.e. strategic ideas]. Because I think this is what [the CEO is] expecting from us. [The CEO] is not expecting from us some tactical ideas on how to fix the business. [He is] expecting something from us...that [he] doesn't know. (Interview with Valerie)
It has been a learning experience in terms of what is strategy...what has helped me [is] to see [from the presentations] of other groups that there is no right or wrong, you could watch that it's more testing what is going to work better and what not...[based] on our specific experience (Interview with Izmael)
They [the employees] are mainly people from the frontline and I think that's why...they had to learn how to tell the story ...If there was only one [employee group] that would be more difficult. Because they didn't understand how to present the challenges. [The employees learned] not just to come up with ideas [by themselves], but also...by seeing [other] presenters...A [names of employees] were simply convincing at the end. Well, and of course, that developed over time. So, in the first [CEO meetings] they were really disappointed [by the reaction of the CEO] and then they undertook their task. (Interview with senior leader)