The Eclectic Roots of Strategy Implementation Research

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The researcher interested in strategy implementation faces a formidable challenge. Although this area has drawn many calls for research attention, there is not a deep and cohesive body of prior literature on which to draw in developing new efforts. This study proposes that through taking a broadened perspective of the nature of implementation, a range of valuable insights for the implementation researcher is available. First, various conceptualizations and definitions of implementation that have been proposed are considered. Next, a broad range of literature fields that have direct and indirect implications for the study of strategy implementation are reviewed. This review is organized around a framework that distinguishes between structural and interpersonal process views of implementation. Insights for the implementation researcher are highlighted. Finally, future directions for implementation research are proposed. J BUSN RES 1999. 45.119–134. *© 1999 Elsevier Science Inc. All rights reserved.*

Well-formulated strategies only produce superior performance for the firm when they are successfully implemented (cf. Bonoma, 1984). Despite the significance of the implementation process, however, relatively little research attention has been directed to the area. Perhaps this is due to the tendency of some strategists to assume that shrewd strategy formulation is the only necessary element for strategic success. In these cases, implementation is often viewed as a fairly mechanistic control function. In other words, implementation is treated by some managers and many scholars as a strategic afterthought. As expressed by Day and Wensley (1983),

> Many of the models of strategic management . . . tend to assume too simple a link between the development of strategic direction and its actual implementation via the allocation of resources. In practice, . . . the actual process of resource allocation often incorporates a number of implicit but critical strategic moves (p. 86).

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Our knowledge of the nature of strategy implementation and the reasons for its success or failure is limited (cf. Walker and Ruekert, 1987). Researchers interested in this area face a formidable challenge due to the general lack of existing research on which to base new efforts. The premise of this study is that a solid basis for implementation research does exist, although it requires a broadened perspective and the potential consideration of an eclectic collection of literature fields. Through a broadened treatment of the nature and roots of implementation, a foundation is revealed that will provide grounding for a variety of approaches to the study of strategy implementation. In the sections to follow, existing definitions and conceptualizations of implementation are first examined. These illustrate the wide array of perspectives that have been taken in the conceptualization and study of strategy implementation. Next, literature from a wide range of fields with implications for the study of implementation is considered. This is organized around a framework distinguishing between structural and interpersonal process views of the nature of implementation. Finally, thoughts on the state of implementation research and potential avenues for future work are presented.

The Nature of Implementation

One reason for the lack of a cohesive body of existing implementation research may be the diversity of perspectives that have been taken in defining the concept. The most common conceptualization has assumed implementation to be a relatively straightforward operationalization of a clearly articulated strategic plan (e.g., Wind and Robertson, 1983). Other researchers have taken different approaches such as emphasizing more interpersonal and behavioral elements (e.g., Cyert and March, 1963; Frankwick et al., 1994; Workman, 1993). A review of the literature reveals few formal definitions of strategy implementation. Table 1 presents some of the different views that have been proposed.

The range of views put forth is considerable. One approach (e.g., Hrebiniak and Joyce, 1984) holds implementation to be

Journal of Business Research 45, 119–134 (1999)

655 Avenue of the Americas, New York, NY 10010
ISSN 0148-2963/99/$–see front matter
PII S0148-2963(97)00231-2

Table 1. Perspectives on Implementation

- Implementation is a series of interventions concerning organizational structures, key personnel actions, and control systems designed to control performance with respect to desired ends. (Hrebiniak and Joyce, 1984)
- The implementation stage involves converting stratetic alternatives into an operating plan. (Aaker, 1988)
- Implementation is the managerial interventions that align organizational action with strategic intention. (Floyd and Woolridge, 1992)
- Implementation is the process that turns plans into action assignments and ensures that such assignments are executed in a manner that accomplishes the plan's stated objectives. (Kotler, 1984)
- Implementation is turning drawing board strategy into marketplace reality. (Bonoma, 1984)
- Implementation refers to the "how-to-do-it" aspects of marketing. Implementation deals with organizational issues, with the development of specific marketing programs, and with the execution of programs in the field (Cespedes, 1991)
- During the implementation phase, a policy decision must be spelled out in operational detail and resources allocated among programs. (Laffan, 1983)

an act of control and monitoring. This treatment of implementation as synonymous with control is a common perspective in many business strategy texts. Another common view (e.g., Floyd and Woolridge, 1992; Kotler, 1984) treats implementation as synonymous with execution of the strategic plan. This view is limited in that it fails to acknowledge the emergent nature of many implementation processes—initial plans are often adapted due to changing organizational or environmental conditions. Finally, several authors (e.g., Cespedes, 1991; Laffan, 1983) view implementation as a finer level of planning involving the allocation of resources and the resolution of operational issues. Combining several of these perspectives with more of a focus on the processes involved, strategy implementation is defined here as the communication, interpretation, adoption, and enactment of strategic plans. Next, a broad range of literature is reviewed that either directly addresses implementation issues or provides related insights that should be of interest to implementation researchers.

Implementation-Related Research

A straightforward search for strategy implementation literature provides relatively little for the aspiring researcher. By taking a more broadened view, however, many meaningful insights can be found to guide new implementation research efforts. This section reviews a wide span of literature with implications and potentially valuable insights for the study of strategy implementation. The basic organizing framework for this review proposes that structural views and interpersonal process views are important general dimensions of strategy implementation (Skivington and Daft, 1991). Managers make adjustments to formal, structural elements of the organization such as roles, reporting relationships, and control mechanisms in order to enact strategic decisions. In addition to these formal factors, a range of interpersonal and cognitive factors may also become salient as managers strive to interpret and respond to a strategic initiative (cf. Skivington and Daft, 1991). In the sections below, literature from these areas is sampled, and implications for implementation research are highlighted.

Structural Views

Research taking a structural perspective has studied the effects of the formal organizational structure and control mechanisms on implementation processes and outcomes.

ORGANIZATIONAL STRUCTURE. Whereas extensive research has examined the relationship between strategy formulation and organizational structure (e.g., Bain, 1968; Miles and Snow, 1978; Porter, 1980), only limited attention has been given to the contingency between organizational structure and implementation processes. Gupta (1987) examined the relationships between SBUs' strategies, aspects of the corporate-SBU relationship, and implementation and found that structures that are more decentralized produce higher levels of SBU effectiveness, regardless of the strategic context. Drazin and Howard (1984) suggest that a proper strategy—structure alignment is a necessary precursor to the successful implementation of new business strategies. Changes in the competitive environment necessitate adjustments to the organizational structure. If the firm lags in making this realignment, they may exhibit poor performance and be at a serious competitive disadvantage.

CONTROL MECHANISMS. A fundamental question facing managers is how to assess performance during and after the implementation of a new strategy. This assessment or control function is a key aspect of implementation processes. Daft and Macintosh (1984) explore the role of formal control systems in strategy implementation. They define organizational control as a three-stage cycle including (1) planning a target or standard of performance; (2) monitoring or measuring activities designed to reach that target; and (3) implementing corrections if targets or standards are not being achieved. Both Jaworski and MacInnis (1989) and Jaworski et al. (1993) showed a strong relationship between the type of control system in use and firm performance. This implies that the nature of the control system in an implementation effort is a critical decision. It also suggests that control systems may need to be flexible in order to evolve as an implementation effort unfolds.

Interpersonal Process Views

Regardless of the nature of organizational structure and control systems in place, it seems clear that interpersonal processes and issues are an important part of any strategy implementation effort. In the next sections, research into strategic consensus, autonomous strategic behaviors, diffusionary processes, the effects of leadership and implementation styles, and communication and other interaction processes are considered.

STRATEGIC CONSENSUS. The degree of strategic consensus between managers may influence the success with which strategic directives are implemented. Strategic consensus is a shared understanding and commitment to a strategic directive between individuals or groups within an organization. Whereas a general assumption in this literature has been that higher levels of consensus will lead to higher levels of firm performance, a more complex understanding of the nature and consequences of consensus has emerged. Other benefits of strategic consensus should be the development of a commitment among managers and a reduction of uncertainty in the organization. However, a negative consensus—performance relationship may result in highly complex and uncertain environments. In these environments, different organizational subunits need to respond to different external contingencies, requiring the maintenance of different belief structures to maximize effectiveness (Hrebiniak and Snow, 1982). In this environment, the variance in perceptions and goals held by subunits may actually be beneficial to the firm.

Woolridge and Floyd (1989) explore the consensus construct further. They propose that scope—who is considered in evaluating consensus, and content—what decision-makers agree about, are important dimensions of consensus. Woolridge and Floyd also address another variable with important implications for implementation research, the extent to which managers are committed to the strategic initiative. As they describe, shared understanding without commitment may result in "counter effort" and negatively affect performance.

Consensus is an important factor in implementation-related decision-making. In a study of the ancillary outcomes of group decision-making processes, Schweiger et al. (1989) found that groups of middle managers using dialectical inquiry and devil's advocacy approaches made significantly higher quality decisions than groups seeking total consensus in their decisions. This suggests that at least among peer groups of decision-makers, a certain amount of diversity of opinions may create a healthier environment that produces more effective strategic decisions. Total consensus may result in "group think" and the suppression of valuable individual opinions.

Whitney and Smith (1983) broaden the study of consensus to examine the interaction and belief differences between senior and middle managers. This topic is noteworthy as formulated plans are most typically passed to middle levels of the organization during the implementation process. Whitney and Smith propose that obtaining commitment to a strategic plan at all levels in the organization is often problematic. Operating managers may be apathetic in response to the planning efforts of upper management or may even perceive these efforts as a threat. The potential for conflict is further aggravated by the potential development of an *esprit de corps* within organizational groups. The authors found support for their belief that cohesiveness can result in greater polarization of organizational subgroups, thereby impeding the successful implementation of a strategic plan.

Taking an even broader view of strategic consensus, Nielsen (1983) contends that firms must achieve consensus both within and outside the firm in order to successfully implement business strategies. The firm's failure to at least "satisfice" (Kaufman, 1990) external constituencies such as regulatory agencies, environmentalist groups, and the like can seriously jeopardize an implementation effort if the constituency has the power to block or delay key elements of the strategy.

Finally, Floyd and Woolridge (1992) present a broad review of strategic consensus research. They propose that strategic consensus can be assessed along both cognitive and emotional dimensions. Cognitively, a lack of consensus is created by managers who don't share a common perception of the meaning of the strategy. This causes individuals to put forth efforts that are not always in harmony. Managers' affective consensus depends on how the proposed strategy fits with what managers perceive as the best interests of the organization and how it fits with managers' own self-interests. Both cognitive and affective consensus should be necessary for maximized organizational performance.

In sum, the strategic consensus literature provides a broad range of views of the value of a collective mind set during implementation efforts. The most common assumption of this research, a direct and positive relationship between consensus and firm performance, appears to be somewhat tenuous. More realistic appears to be the view that the consensus—performance relationship in implementation is moderated by numerous organizational and personal factors.

AUTONOMOUS STRATEGIC BEHAVIORS. When strategic consensus does not exist within the firm, organization members are not operating under the same goals and objectives. In this environment, managers may intentionally deviate from a strategic initiative in order to pursue their own desired ends. At times, this behavior may be well-intentioned as in the case of the manager who honestly feels that "her way" is best for the firm. At other times, however, deviation from a strategic initiative may be for self-serving purposes such as the protection of personal turf and power bases. In any case, these autonomous behaviors can have a profound effect on the success with which a strategic plan is implemented and the nature of the strategy that emerges. A body of research has examined these autonomous strategic behaviors and their antecedents and consequences.

Guth and MacMillan (1986) suggest that "self-interested interventions" on the part of middle managers are likely when their goals and beliefs are not highly congruent with those of senior management. Low personal commitment by middle managers may result in only passive compliance or, in a more extreme case, in "upward intervention" by middle managers during strategy formulation or implementation processes. Upward intervention may include subversive behaviors such as verbal arguments, objecting memos, coalition formation, the deliberate creation of barriers to implementation, and even outright sabotage. Passive intervention can take the form of giving the strategy of low priority or general "foot-dragging," both of which can result in unnecessary delays and inhibit the implementation effort. In an empirical study, Guth and MacMillan (1986) found that managers who believe their self-interest is being compromised can redirect a strategy, delay its implementation, reduce the quality of its implementation, and even totally sabotage the effort.

Connors and Romberg (1991) study the often subversive reactions of middle managers faced with a change in their power and authority base. The authors argue that the current trend toward flatter organizational structures has placed the true decision-making authority in the hands of line workers and the "coaching" function in the hands of senior management. In this environment, middle managers may feel their power bases slipping away and may behave subversively in an attempt to maintain their power and status. In a study of the implementation of a TQM program in a large firm, the authors find: (1) a strong desire on the part of middle managers to maintain the power and authority that traditionally separated them from the line workers; (2) several managers manipulating the program to their own best interests, particularly in cases where the strategic directives were ambiguous and left significant room for interpretation; and (3) an underlying suspicion among middle management that they were not being given full information by senior management. These findings may be particularly relevant in cases where the implementation of strategies requires significant organizational change.

A more positive view of autonomous behaviors is provided by Bonoma (1986). He feels that turbulent business environments require novel managerial responses. In his view, "subversives" are key individuals during these challenging periods. Subversives are "individuals who challenge old practices and, when necessary, violate company rules and policy" (Bonoma, 1986, p. 113). These managers are able to improvise under conditions of change, are willing to change long-standing practices, and tend to be action-oriented. Bonoma makes the point that under many conditions a certain amount of autonomous strategic behavior may be desirable.

DIFFUSION PERSPECTIVES. One conceptualization of strategy implementation is as a "trickle down" process. In this view, senior management initiates strategies, which are then communicated through middle management to line workers. Whereas implementation processes may often be more iterative than this metaphor would suggest, the concept of diffusion is likely to be salient to many organizations and implementation processes. In this section, research on technology and organizational innovation diffusion is reviewed to provide insights into strategy implementation processes.

Diffusion research provides insights regarding strategy sponsors, adopters, firm-level factors, and the effects of the nature of the strategy being implemented. Robertson and Gatignon (1986) suggest that the reputation of the sponsoring senior executive is an important factor in facilitating organizational adoption. For adopters, research shows that outward thinkers are more apt to be early adopters (Robertson and Gatignon, 1986), and some organization members are naturally predisposed to adopt an innovation with little prodding, whereas others will wait for formal directives to adopt (Leonard-Barton and Deschamps, 1988). At the firm level, vertical communication patterns (Fidler and Johnson, 1984; Robertson and Gatignon, 1986), organizational inertia (Boecker, 1989), and the firm's overall strategic profile (Gaertner et al., 1984) may influence the rate of adoption of the new strategy within the organization. Finally, research in this area has suggested that the more radical the changes required by the implementation effort, the slower may be the rate of organizational adoption (Robertson and Gatignon, 1986).

LEADERSHIP AND IMPLEMENTATION STYLE. The leadership style of senior managers can have a significant effect on implementation elements such as the delegation of authority and decision-making. Gupta and Govindarajan (1984) address the relationship between the characteristics of an SBU's general manager and the perceptions of effectiveness in strategy implementation. The results of this interview-based study show that "build" SBUs should have general managers with greater marketing/sales experience, greater willingness to take risk, and greater tolerance for ambiguity than should "harvest" SBUs.

Nutt (1983) considers the link between the organizational climate (defined based on degrees of centralization, complexity, production, and efficiency) and various approaches to implementation. As he describes, the management of the implementation process generally requires a driving force in the organization in order to succeed. In some cases, implementation is driven by an change agent (or "champion") who is typically a high level leader who paves the way for plan adoption by shaping and guiding the planning process. Planner-managed processes involve the strategy's primary developer taking a leadership role in trying to "sell" the strategy. Finally, in participation-managed planning, organizational participants are involved in the strategy through a process of coopting. Another important dimension of implementation style is the technique used to enact the strategy. A unilateral approach requires the implementor to merely announce the plan and specify the behavior needed to comply. Manipulative techniques are more subtle, seeking to illuminate a problem and then steer users to new practices. Delegative techniques involve the coopting of those affected by the plan, seeking to involve them in the implementation process. A final dimension

Table 2. Summary of Conceptual Implementation-Related Literature

Article	Overview	Contribution
Nutt (1983)	This article takes the position that implementation prospects improve when the strategy planning process is linked to implementation and when an implementation approach is tailored to fit the internal environment of an organization.	Considers a range of implementation techniques and power bases that, combined, form appropriate implementation approaches for a variety of planning situations (16 archetypical environments in all).
Nielsen (1983)	This article examines relationships between strategic planning and consensus building with external groups and constituencies. Methods for consensus building with external groups during strategic planning and implementation are discussed, and five cases from different economic and political sectors are examined in conjunction with the principles considered.	Extends previous work which has considered internal consensus building by considering consensus building with external groups during strategic planning. Suggests consensus building with external groups will have a positive influence on both strategy development and implementation.
Drazin and Howard (1984)	New strategic objectives result from responses to a changing competitive environment. These changing strategies create administrative problems that require new or modified organizational designs to support the strategy effectively. This study describes a general design technique that can be used to achieve a good fit between strategic and design components, thus facilitating implementation and improving performance.	This article makes the case that strategy/structure realignment is a necessary precursor to strategy implementation. It presents a design process that allows organizational members to achieve this realignment.
Fidler and Johnson (1984)	The abilities of decision-makers to implement innovations at lower levels in the organization are crucial to organizational success. Risk and complexity are characteristics of innovations that can lead to resistance within the organization. Communication costs, types of power, and communication channels are structural characteristics that can be used by decision-makers to overcome this resistance. The interaction of these factors can determine the degree of successful innovation implementation within organizations.	The authors develop a series of propositions to explore the use of communication tactics to reduce the risk and complexity that inhibit the successful implementation of many new innovations within the organization.
Bourgeois and Brodwin (1984)	The authors consider five process models of implementation (commander, change, collaborative, cultural, and crescive). Two fundamental variables appear to characterize these different views, shifting continuously from the commander to the crescive model. They are, first, a shift from centralized to decentralized decision-making for both strategy development and implementation and, second, an increasing blurring of the distinction between "thinkers" and "doers."	Draws attention to an area (implementation) that has traditionally been treated as merely an activity following formulation. This article serves to synthesize advances in the study of implementation, structured around these five models.
Dess and Origer (1987)	This article makes a distinction and provides an overview of the two primary perspectives on consensus: consensus as either the outcome of a decision process and consensus as the process of building consensus. Several moderating factors in the relationship between consensus and performance are identified.	Presents an integrative model of the antecedents and consequences of consensus in strategy formulation.
Bonoma and Crittenden (1988)	Proposes a taxonomy relating structural variables and managerial skills to key issues in implementing marketing strategies. Developed through a series of in-depth interviews with high-level executives. The taxonomy was validated through a series of 44 case studies.	Raises several important issues related to implementation success. Notes the intertwined nature of strategy and implementation. Raises the interesting point that implementation structures and skills will influence the nature of the strategies that are formulated.

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Table 2. (*Continued*)

Article	Overview	Contribution
Hambrick and Cannella (1989)	The authors observed the following patterns of behavior in cases of successful implementation: (1) obtaining broad-based inputs and participation at the formulation stage; (2) carefully and deliberately assessing the obstacles to implementation; (3) making early use of the full array of implementation levers—resource commitments, subunit policies and programs, structure, people, and rewards; (4) selling the strategy to everyone who matters (upward, downward, across, and outward); (5) steadily fine tuning, adjusting, and responding as events and trends arise.	This article emphasizes the importance of selling a strategy within the organization, an area that hasn't received much attention in previous implementation work.
Woolridge and Floyd (1989)	This article addresses the inconsistent findings that have been reported in exploring the link between consensus in the top management team and performance by providing a description of how the strategic process affects consensus. Synoptic and incremental processes are compared in terms of their effects on the scope, content, and degree of consensus. In addition, two dimensions of consensus, shared understanding and commitment, are considered.	Adds to the continuing debate on the relationship between consensus and performance by suggesting that the relationship between these two constructs is much more complex than previously hypothesized. Suggests several directions for future study.
Argyris (1989)	Presents the results of a group exercise designed to expose individual and organizational defensive routines based on the "Human Theory of Control."	The discussion of organizational defensive routines appears particularly salient as a means of explaining limitations in organizational learning and how these lead to harmful gaps and inconsistencies in the strategy process.
Priem (1990)	This article considers top management team composition, structure, and decision processes as well as environmental dynamism as antecedents to the consensus—performance relationship.	Since neither perfect disagreement (chaos) nor perfect agreement ("groupthink") are desirable within most top management teams, a curvilinear relationship is suggested between consensus and performance.
Sandy (1991)	Presents eight common breakdowns between strategy planning and implementation: (1) underestimating the voice of the customer; (2) information is not organized for action; (3) the process of reaching conclusions does not involve the right people; (4) fragmented, piecemeal, or insufficient solutions; (5) no champions and few reasons to take on that task; (6) people you count on don't understand how to succeed; (7) nobody keeps score; and (8) nothing happens when you win.	Presents guidelines for successful implementation from a practitioner perspective. Several of the points (e.g., consideration of champions, differences in understanding) coincide with some of the more academic work in the area.
Floyd and Woolridge (1992)	This article examines an approach to implementation that focuses on the level of strategic understanding and commitment shared by managers within the organization. A framework identifying four categories of strategic consensus is introduced and used as the basic for analyzing differences in how managers perceive organizational priorities.	Describes a technique (consensus mapping) useful for identifying implementation gaps within an organization and identifies some techniques for closing those gaps.
Simkin (1996)	Focuses on the proper structuring of marketing planning processes to maximize the chances of successful implementation. Develops a list of planning pitfalls based on observational data.	Contends that an organized, ongoing program of guidance and control (or "policing") can overcome many problems encountered in planning and implementation. The benefits of this program are said to be communication, training, motivation, marketing intelligence and the achievement of a market orientation.

Table 3. Summary of Empirical Implementation-Related Literature

Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Stagner (1969)	217 vice presidents and top executives form Fortune 500 companies; mailed questionnaire	(IV): Managerial cohesiveness, formality, centralization, satisfaction with process; (DV): Profitability (not used in examining relationships with managerial cohesiveness)	Correlation analysis	Positive correlation between executive satisfaction on decision-making process and profitability; supported view of corporation as a coalition; found three important dimensions of decision-making process: managerial cohesiveness, formality, and centralization.
Grinyer and Norburn (1977–78)	21 firms (91 executive respondents); field study with questionnaire	(IV): Existing objectives (who sets and influences), responsibility for marketing plans, nature and communication of information to senior management; (DV): Return on net assets	Correlation analysis	Higher financial performance is associated with the use of more information processes (channels of information); the use of informal channels is associated with high performance; no evidence to support the correlation between common perception of objectives and financial performance.
DeWoot, Heyvaert, and Martou (1977–78)	123 firms; little information provided regarding research method or interviewees	(IV): Consensus, defined as agreement on means for innovation activities; (DV): long-term profitability	Correlation analysis	Firm performance is not explained by the number of innovations made but its capacity for combining technical progress with corporate strategy and efficient decision-making.
Bourgeois (1980)	On-site interviews with CEOs of 12 firms; field study with questionnaire completed by 67 top managers	(IV): Consensus on corporate goals (ends) and competitive strategies (means); (DV): firm performance (composite measure)	Correlation analysis, ANOVA	Suggests that strategy makers should concentrate on reaching consensus concerning means (competitive strategies) rather than ends (goals) when formulating strategies for single-mission enterprises.
Hrebiniak and Snow (1982)	49 firms, 247 executive respondents; mailed questionnaire	(IV): Agreement on firm's strengths and weaknesses, environmental complexity; (DV): Return on assets	Partial correlations, factor analysis	Agreement among top managers is positively related to economic performance, even when controlling for other variables potentially related to organizational performance.
Whitney and Smith (1983)	90 student subjects; experimental design	(IV): Role (Product manager, strategic planner), cohesiveness level (control, informational, cohesive); (DV): Attitude polarization and knowledge about the strategic plan	ANOVA	Suggests that cohesiveness can result in greater polarization, thereby impeding the successful implementation of the strategic plan.
Laffan (1983)	Four levels of actors involved in implementation of a public policy; Field study approach	Communication, control (administrative, financial, and political), and evaluation	General observations	The use of the "policy network" concept draws attention to the relationships that actors in the system must engage in to achieve their implementation goals.

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Table 3. *(Continued)*

Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Gupta and Govindarajan (1984)	58 SBUs within eight Fortune 500 firms; Mailed survey instrument	(IV): Managerial characteristics, SBU strategy; (DV): effectiveness at implementation	Regression	Suggest that "build" SBUs should, in general, have GMs with greater marketing/sales experience, greater willingness to take risk, and greater tolerance for ambiguity than should "harvest" SBUs.
Gaertner, Gaertner, and Akinnusi (1984)	Employees of two federal agencies; interviews (200), questionnaires (300), and archival data	Organizational context (mission, environmental support, competition, and structure) and issues surrounding the innovation process	Primarily qualitative	Differences between agency types in attitudes toward the innovation were found: In the generalist organization (EPA), the administrative innovation was sought by top management to improve coordination, but was difficult to achieve; in the specialist organization (MSHA), administrative innovation was more easily achieved but was less sought after.
Daft and Macintosh (1984)	First stage: nine firms/31 respondents; Second stage: 20 firms/86 respondents; Unstructured and structured interviews.	Inductive identification and categorization of formal control systems	"Direct research": qualitative exploration of control mechanisms in use	Two models are proposed: one links control systems to business level strategy implementation and the other defines primary and secondary roles for management control system components in the management control process.
DeRijcke, Faes, and Vollering (1985)	Five purchasing cases	Decision variable differences between strategic and operational decisions	Decision systems analysis	The study found several differences between the decision processes involving strategic and operational decisions. For example, strategic and operational decision-making require different mixes of marketing stimuli.
Wernham (1985)	62 subjects at senior and middle management levels within the same firm; semi-structured interviews	None in particular, purely an inductive study examining emergent themes	Development of themes based on a qualitative study of three implementation efforts within the same organization	Factors influencing implementation were found to include: availability of resources of all kinds, top management support, perception of benefits, technical and organizational validity, history of past implementation attempts, size of the implementing unit, and the nature of the market environment.
Nutt (1986)	91 researcher-developed case studies; transactional path models and in-depth interviews.	Tactical variables (tactics); Context variables (perceived importance, staff support, time pressure, and process budgets); and an outcome variable (success rate)	ANOVA, correlation analysis, chi-squares analysis	Four general implementation tactics were used in 93 percent of cases (intervention, persuasion, participation, edict). Intervention tactics and their variations were effective for all types of changes and under varying levels of time pressure and importance, suggesting that managers shold use these tactics more often.
Sproull and Hofmeister (1986)	School administrators (two levels) and elementary school teachers ($n = 51$ at t_0; $n = 26$ at t_3); Repeated measures design (four periods); Interviews and Likert scales	Elements of interpretation, attribution, and inference	Simple comparison of mean responses	In the course of implementing the innovation some perceptions, attributions, and inferences shifted over time but initial major differences associated with organizational position and commitment to the innovation did not change.

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Table 3. (*Continued*)

Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Guth and MacMillan (1986)	90 MBA students, 330 total incidents; Critical incident technique	Scope and success of strategy intervention	*t*-tests	Data suggest that middle managers who believe their self-interest is being compromised can redirect a strategy, delay or reduce the quality of its implementation, or even totally sabotage the strategy.
Gupta (1987)	Eight firms, 58 senior executives and SBU senior managers; survey instrument	(IV): Strategic mission, Competitive strategy, Openness of corporate-SBU relations, Subjectivity in performance assessment, and corporate-SBU decentralization; (DV): SBU's effectiveness (multidimensional but primarily actual vs. a priori expectations)	Regression analysis	For SBUs trying to build market share or to pursue differentiation as a competitive strategy, openness in corporate-SBU relations and subjectivity in performance assessment were found to be positively associated with effectiveness; for SBUs trying to maximize short-term earnings or to pursue low cost as a competitive strategy, the corresponding associations were found to be negative. In contrast, corporate-SBU decentralization emerged as positively associated with SBU's effectiveness irrespective of their strategic contexts.
Dess (1987)	19 firms, 74 top management team respondents; in-depth interviews and written questionnaires	(IV): Consensus on company objectives and competitive methods; (DV) Objective and subjective measures of firm performance	Correlation analysis	The results do not support the primary contention of the study: that consensus on both company objectives and competitive methods is necessary to explain performance differences between firms but, rather, consensus on either is positively related to organizational performance. The results also suggest that reaching consensus on both of these areas provides no performance advantage over reaching consensus in just one of these areas.
Leonard-Barton and Deschamps (1988)	93 salespeople for a single computer manufacturer; telephone survey	(IV): Management influence, personal characteristics and skills of targeted users, social influence; (DV): measure of use; (control variables): Physical accessibility and training	Hierarchical regression	Employees whose characteristics incline them to adopt an innovation will do so without management support or urging if it is simply made available. Employees low on these characteristics will await a managerial directive before adopting.
Govindarajan (1988)	Executives and general managers at 24 Fortune 500 firms; mailed survey instrument	(IV): Measures of competitive strategy, budget evaluative style, locus of control, and decentralization; (DV): SBU effectiveness	Bivariate regression and systems approaches to fit	Findings suggest that matching key administrative mechanisms (org. structure, control systems, and managers' characteristics) with the firm's strategic focus (low cost/differentiation) will be associated with superior performance. All three mechanisms were found to be important in achieving effective implementation.

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Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Boecker (1989)	51 semiconductor firms; interviews, archival data	(IV): Current strategy, initial strategy, distribution of functional influence, organizational age, entrepreneur's tenure, management ownership; (DV): performance (sales increase relative to industry)	Correlation and regression analysis	Characteristics of an organization's founding imprint its initial strategy by contributing to an internal consensus around a given strategic approach. Conditions subsequent to founding also influence the degree to which an initial strategy is perpetuated.
Schweiger, Sandberg, and Rechner (1989)	120 middle and upper-middle-level managers; experimental design	(IV): Subjects used either a dialectical inquiry, devil's advocacy, or consensus approach to developing case analysis recommendations; (DV): Group performance, group meeting time, and group members' reactions.	ANOVA	Compared to consensus groups, groups using dialectical inquiry and devil's advocacy made significantly higher quality decisions. There were no differences between dialectical inquiry and devil's advocacy groups. Experience in using the three decision-making approaches improved decision quality, critical reevaluation levels, and the reactions of group members and reduced time required to reach decisions.
Johnson and Frohman (1989)	3 firms; Field study	Unspecified variables related to implementation and middle management perceptual "gaps"	General observations only	Suggest several adaptive organizational responses to eliminate middle management gaps. These include redefining jobs and rewards to legitimize the integrating function of middle managers, giving individuals and teams authority, holding them accountable, getting middle managers the information they need, and helping people in the middle build lateral networks
Nutt (1990)	79 executives and 89 middle managers; Controlled simulation	(IV): Decision styles; (DV): Prospect of adoption and perceived risk; (control variables): age, experience, and educational background; Group differences also considered	ANOVA and repeated measures techniques	Views of both adoption and risk were found to be influenced by decision style. The decisions of top executives were more style dependent than those of middle managers. Several differences were found in decision-making based on the extended Jungian decision style framework used.
Woolridge and Floyd (1990)	20 firms (156 respondents); semi-structured interviews and questionnaire	(IV): Involvement in the strategy process, consensus (commitment and understandings); (DV): organizational performance (subjective assessment)	Correlations, partial correlations, qualitative findings	The results suggest that involvement in the formation of strategy is associated with improved organizational performance. Strategic consensus among middle-level managers is related to involvement in the strategic process but not to organizational performance.
Pinto and Prescott (1990)	408 project managers from a broad range of firms; mail survey	(IV): Project implementation profile (measures key success factors in implementation), stage of project life cycle; (DV): perceived project success	Regression, factor analysis	The relative importance of planning and tactical factors is contingent upon the type of success measure employed.

(Continued)

Table 3. (*Continued*)

Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Skivington and Daft (1991)	57 strategic decisions; combination of open-ended interviews and closed-end survey instrument based on critical incident technique	Elements of structure, systems, interaction, and sanctions	Partial correlations and cluster analysis	Implementation utilized both structural framework and interaction process elements, but a different implementation gestalt characterized each type of strategic decision.
St. John and Rue (1991)	15 carpet industry firms (165 total respondents); mail survey	(IV): Consensus on competitive strengths and company goals, frequency of use of coordinating mechanisms; (DV): "outstanding performance" on dimensions of style, quality, and service	Chi-square, correlation analysis	Findings showed that those firms that made more frequent use of planning techniques experienced higher levels of interdepartmental consensus. Consensus between departments was strongly related to marketplace performance reputation.
Connors and Romberg (1991)	A single manufacturer (600 employees); ethnography	Middle and lower management strategies for obstructing TQM implementation	General observations	(1) Desire to maintain power and authority caused middle managers to be slow to transfer decision-making authority to lower level workers; (2) In situations where policy objectives were ambiguous, managers manipulated the program to their own advantage; and (3) Middle management felt they were not being given full information by senior management.
Dopson, Risk, and Stewart (1992)	Senior and middle mangers in 12 firms; in-depth interviews	Changes affecting middle managers' jobs; how their jobs have changed; and the implications managers see for their work, career, and life.	General observations	Whether middle managers see change as positive or negative seems to depend on: (1) How clear the need for change is within the organization; (2) The extent to which change is seen as normal; (3) What is done to try to help managers think positively and adapt to change; and (4) Whether the managers see themselves primarily as professionals or primarily as managers.
Floyd and Woolridge (1992)	MBA students conducted in-depth field studies of their own firms (25 firms total); survey instrument	Middle manager role (of four in typology), organizational strategy	Factor analysis, MANOVA	This study builds a typology of four middle management strategic roles (championing alternatives, synthesizing information, facilitating adaptability, and implementing deliberate strategy). Weak support is found for a priori hypotheses.
Bryson and Bromiley (1993)	68 case descriptions of major strategies; variables of interest were coded using information in cases	(IV): Context of the strategy planning and implementation processes; (DV): Strategy outcomes	Factor analysis and regression	A number of contextual variables strongly influence aspects of the strategy planning and implementation process and, thus, indirectly influence strategy outcomes.
Schwenk and Cosier (1993)	152 student subjects; experimental design	(IV): Three treatment conditions (devil's advocacy, agreement, control), subsets of high and low consensus; (DV): Performance (as evaluated by independent judges)	ANOVA	The results of this experiment suggest that the overall effects of consensus on decision-making are positive. Further, the results suggest that structuring top management teams to achieve consensus on objectives may improve their performance. Other results suggest the devil's advocacy technique may lead to better performance in individual decisions but may damage group morale.

(*Continued*)

Table 3. (*Continued*)

Study	Subjects/Research Method	Variables Studied	Analysis	Key Findings
Egelhoff (1993)	Senior management members within each of eight U.S. and eight Japanese semi-conductor firms (number of participants not specified); in-depth structured and semi-structured interviews	Unique product/market advantage, withdrawal decisions, role of process technology, success of process technology, and the importance of vertical integration.	Consideration of emergent themes and differences between "strategy-oriented" U.S. firms and "implementation-oriented" Japanese firms.	Several advantages and disadvantages of competing through strategy implementation (rather than through superior strategy) are considered. For example, in implementation-oriented environments fewer different strategies exist, producing more direct competition and a greater emphasis on quality and cost.
Lamont, Williams, and Hoffman (1994)	76 firms pursuing three diversification strategies (vertical, related, unrelated)	(IV): Strategy; implementation speed; (DV): Performance change during transition, recovery time	ANCOVA; LIFEREG	This study examined firm performance deterioration during reorganization periods and the time required for performance to recover to prereorganization levels. Prior strategy and implementation speed were found to affect both transition performance and recovery time.
Waldersee and Sheather (1996)	35 mid- to upper-level managers	Multiple case study simulation method with measures of leadership styles, involvement in the change process, locus of control, risk aversion	*t*-tests	Examined the effects of strategy on leader behavior and choice of implementation actions. Results show that strategic context influences managers' implementation intentions.
Strahle, Spiro, and Acito (1996)	25 chief executives at consumer grocery product firms; 367 sales managers	Marketing strategy categorization, product life cycle dimension, sales objective categorization	Nonparametric sign test, *z*-test of differences, *t*-tests	The results show that there are often differences between marketing executives and their sales managers concerning specific product strategies. Emphasizes the need for input and cooperation from all constituencies involved in marketing a product for successful implementation.

of implementation style considered by Nutt (1983) is the base of power used in the implementation process (reward, legitimate, referent, expert, or informational). The power base employed is closely tied to the technique used to guide implementation. In a later piece, Nutt (1986) suggests that managerial tactics and leadership style can play a critical role in overcoming the lower-level obstructionism that is prevalent to some extent in many implementation efforts. Line-level employees may use delay or prevent attempts toward change that they find particularly threatening or disagreeable.

In a widely cited piece, Bourgeois and Brodwin (1984) consider five general leadership styles in strategy implementation. These models all encompass elements of both strategy formulation and implementation as well as general, culture-like characteristics of the firm. The commander model is closest to the traditional strategy literature in its focus on centralized direction from the CEO to guide the firm's strategy. The change model emphasizes how organizational structure, incentive compensation, control systems, and other factors can be used to facilitate the implementation of a somewhat radical new strategy. The collaborative model focuses on group decision-making and negotiated outcomes for the firm. The cultural model is closely tied to work on organizational culture (e.g., Deshpande and Webster, 1989) and suggests that lower level employees can be infused with a strong set of collective values, which allows them to participate in the strategic thinking and implementation efforts of the firm. Finally, the crescive model suggests that middle managers should be responsible for a great degree of development, championing, and implementation of new strategies. A fundamental element of the crescive model is the shifting of decision-making and implementation authority to lower levels in the organization than in any of the other models. The Bourgeois and Brodwin (1984) typology illustrates the significant differences in implementation style that exist and may be used in different organizations.

Taking a slightly different perspective, Redding and Catalanello (1994) propose an "improvisational" approach to implementing strategic change in an organization. This view is based on the belief that, "most organizational change results not from formal plans and fixed programs for change but from . . . the collective learning of entire organizations" (p. xi). This improvisational approach consists of three major components: (1) encouraging experimentation, grass roots initiatives, and championing; (2) directing change by sanctioning without taking over, quietly clearing away obstacles, and facilitating cross-fertilization; and (3) recognizing, rewarding, and institutionalizing change through changes in formal structures, rewards, policies, etc. In this view, leadership style can create an environment that is highly conducive to successful strategy implementation efforts.

COMMUNICATION AND INTERACTION PROCESSES. The interaction and communication between managers and coalitions of managers is perhaps the most significant informal process within most organizations (Workman, 1993). Thus, research in this area may explicate some of the major reasons for the success or failure of implementation efforts. Hambrick and Cannella (1989) stress the importance of both vertical and lateral interaction in implementation processes. Their guidelines for successful strategy implementation include: (1) obtaining broad-based inputs and organizational participation at the strategy formulation stage; (2) assessing in advance the potential obstacles to implementation; (3) making early and decisive moves in important areas such as resource commitments, organizational structure, and reward mechanisms; (4) "selling" the strategy to all affected organizational members, both vertically and laterally; and (5) fine tuning, adjusting, and responding as events and trends arise. Sandy (1991) supports many of these views and adds that breakdowns in implementation occur when the strategic initiative is not well organized for action, that is, when necessary implementation behaviors are not well specified. This can cause key organization members to fail in implementation simply because they do not understand how to succeed.

Argyris (1989) notes the significance of organizational defensive routines and considers their implications for strategy implementation. He proposes that defensive routines exist in virtually all organizations. These routines limit learning and often lead to perceptual gaps and other differences in understanding between organizational members. These differences can hamper implementation efforts. Some of the defensive routines considered include "going along" with a higher level executive despite personal beliefs to the contrary, failing to understand what issues may be discussed with senior management, and withholding objections to a strategy until it reaches the active implementation stage. Argyris (1989) suggests that firms must work actively to eliminate these defensive routines if they hope to successfully implement strategic efforts.

Summary

Strategy implementation is a multifaceted and complex organizational process. As such, a wide range of related research areas may have worthwhile implications for its study. In the preceding sections, a broad base of literature was briefly reviewed to suggest areas with potentially valuable insights for implementation researchers. These and other articles are summarized in Tables 2 and 3, which highlight conceptual and empirical implementation-related research, respectively.

The State of Implementation Research

Despite the diverse nature of the literature reviewed, there are some consistent findings that are worth highlighting. First, several views of the nature of the implementation process were presented. Implementation is a complex phenomenon, including elements such as internal and external resource negotiation (Day and Wensley, 1983), political processes such as jockeying for influence (Frankwick et al., 1994), and a shaping and adoption process at multiple levels in the organization (Laffan, 1983; Leonard-Baron and Deschamps, 1988). Although not addressed extensively in this review, it also appears clear that strategy formulation and implementation are intertwined processes with success in both necessary for superior firm performance (Bonoma, 1984; Cespedes, 1991).

Several issues related to the managers implementing the strategy emerged. Managers may engage in self-interested (or "subversive") behaviors, at times to the detriment of the implementation effort (Connors and Romberg, 1991; Guth and MacMillan, 1986). In certain environments, however, a degree of this "maverick" behavior may be desirable as it breaks established organizational routines (Bonoma, 1986). In a related area, the degree of strategic consensus among managers that breeds implementation success appears to be moderated by several factors related to the strategy being implemented and the organizational environment (Priem, 1990; Schweiger et al., 1989). Achieving consensus with key constituents outside the firm may also be important for implementation success (Bourgeois, 1980).

Finally, several key factors influencing potential implementation success emerged. Early involvement in the strategy process by a wide and deep range of organizational members appears to be a predictor of implementation success (Hambrick and Cannella, 1989; Sandy, 1991). In part, this early involvement may serve to reduce the perceptual gaps that exist in an organization regarding a new strategy (Johnson and Frohman, 1989; Wernham, 1985). It seems clear that the most successful implementing organizations must be fairly fluid in their ability to adapt to changing environmental conditions and new strategies. This fluidity is manifest in their ability to adjust organizational structures (Drazin and Howard, 1984; Ruekert, Walker, and Roering, 1985), leadership style, and culture (Bourgeois and Brodwin, 1984; Gupta and Govindarajan, 1984; Nutt, 1983) to better meet new strategic realities. In all, a broad examination of implementation-related literature reveals a somewhat fragmented yet insightful body of work. An advantage of this broad grounding is that it offers many opportunities for further strategy implementation research.

Future Implementation Research

It is clear that well-conceived strategies have little value unless they are effectively implemented. Thus, implementation should be a topic of high interest to both managers and strategy researchers. As has been noted, relatively little direct research attention has been given to the area, although that appears to be changing to some extent. It seems that strategy implementation is a fertile area for future study. There are numerous forms which these future efforts might take.

First, while the formulation aspect of strategy is most often in the domain of senior managers, implementation appears much more closely tied to the daily activities of middle managers. Thus, if we are to improve our understanding of the process and key success factors involved in implementation, it appears essential to better understand the daily lives of middle managers. Ethnographic-type research (e.g., Frankwick et al., 1994; Workman, 1993) has provided valuable insights into strategy processes in the past and should be pursued to better understand factors influencing strategy implementation and middle managers.

Second, it seems clear that aspects of the firm such as culture, organizational structure, and management style may have a profound effect on implementation processes. More research is needed on the influence of these firm factors on strategy implementation success. For this type of study, a more broad-based, cross-sectional approach would be effective. For example, firms could self-categorize their corporate culture based on a profile instrument. Firms of different cultural orientations can then be measured in terms of implementation effectiveness, while perhaps also controlling for other salient factors like industry effects and firm size.

More study needs to be done to identify the key factors that influence individual-level commitment, performance, and success in strategy implementation. Virtually all prior implementation research has examined factors and outcomes at the organizational level. A managerial-level view of implementation may provide valuable insights into factors, heretofore overlooked, that influence overall implementation success. Sampling is often a challenge in this form of research. Whereas mailing lists of high-level executives are available and the group is reasonable accessible through mass mailings, the middle manager is much more difficult to target, particularly when pursuing a multi-firm, cross-sectional approach.

There is also a great need for validated measures of many of the constructs that have been identified as influencing strategy implementation. The development of measures for concepts such as middle manager involvement in the strategy, autonomy in implementation, and the"newness" of the strategy for the organization would advance the field dramatically. There are currently not enough of such tools available to the implementation researcher.

Finally, whereas implementation research may benefit from the different perspectives offered in its eclectic roots, there is a significant need for detailed and comprehensive conceptual models related to strategy implementation. To date, implementation research has been fairly fragmented due to the lack of clear models on which to build. If the area is to advance, more conceptual efforts must be made to enable strategy implementation to achieve an identity of its own as a valid and distinguishable area of study.

In general, it is hoped that this background work will serve to further the study of strategy implementation processes. Implementation is an essential piece in the formula for success of any business. Effectiveness in implementation can even serve as a source of competitive advantage in industries where unique ideas and strategies are difficult to achieve. Although it has long been recognized that the majority of failed strategies break down in the implementation phase, researchers and practitioners have little concrete knowledge of this area. Some of the reasons for our lack of knowledge in this area are the difficulties found in gaining insights into the inner workings of a firm, weak definitions of the construct itself, and the lack of a cohesive base of knowledge on which to build additional research efforts. This article has attempted to address the latter two points with the hope of precipitating further study of this important topic.

The author is grateful to Michael P. Mokwa for his guidance in the development of this manuscript.

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