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Strategic Agility Facilitation

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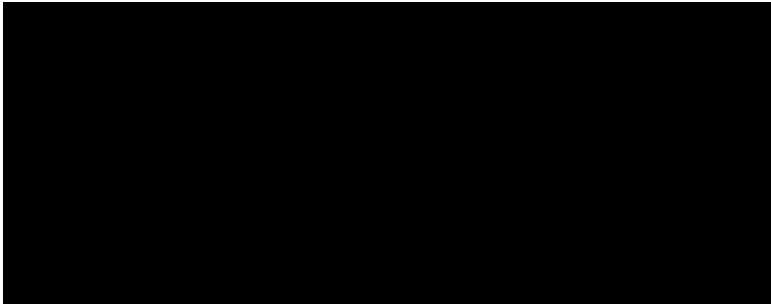
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Management Summary

As the business environment becomes more and more unstable, it has become clear that only those firms that manage to be flexible and adapt quickly to changes can remain competitive. Business leaders have begun to look for professional facilitators who understand how to develop strategies in an agile manner. Thus, today's strategy facilitators are expected to have the appropriate characteristics to help businesses achieve strategic agility.

The main goal of this research was to help modern strategy facilitators be skilled enough to assist their clients with keeping up with the demands of the dynamic business environment. This thesis determined whether the existing characteristics required to be a strategy facilitator were sufficient enough to support strategic agility or whether it was expected to have additional capabilities.

The author decided to conduct qualitative research based on secondary and primary data to examine her assumptions and answer the research questions. The secondary data was collected from scholarly articles and books written by researchers and strategy practitioners and was further analyzed through coding methods. The primary data was collected from the personal experience of the strategy facilitation practitioner in the form of a series of semi-structured interviews and was also analyzed through coding methods.

Initially, the author had an assumption that facilitation characteristics had to be based on the leadership traits of strategic decision-makers. It was suggested that by enabling leaders to acquire traits needed for strategic agility, the facilitator would indirectly lead a company to agile strategy-making. However, the author later recognized that leadership traits did not play a significant role in determining the characteristics of a facilitator. Nevertheless, through the series of mini-workshops organized with the expert, the author still managed to identify that 14 characteristics could be carried over from the strategic planning setting without changes and that there were five new (emerging) characteristics critical to conducting exclusively strategic agility workshops.

This article focused on strategic flexibility as a process, while some scholars perceive it more as the content of the strategy. In addition, the author was not focused on a specific industry, and the individual characteristics of teams participating in workshops with the facilitator were not taken into account. Nevertheless, the results of the thesis still provide

valuable information for practitioners and scholars. They reveal the minimum requirements for strategic agility facilitation and serve as a starting point for further, more detailed research. Facilitators of strategic agility are encouraged to use these results as a basis for self-reflection and see what can be improved in their strategizing methods.

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1 Introduction

As the business environment becomes more and more turbulent, enterprises have to look for new ways to stay afloat and continue being successful. The frequent changes are explained by the emergence of the VUCA world, which is characterized by its volatility, uncertainty, complexity, and ambiguity (Bennis & Nanus, 1995). It became evident that only those companies who manage to be flexible and adapt to changes quickly are able to remain competitive (Sampath & Krishnamoorthy, 2017).

Earlier, such a concept as strategic planning was regarded as a promising guide for tackling the external environment. Managers used it to classify familiar challenges into “boxes with strategy labels” (Prange & Hennig, 2019, p. 111). Today, business practitioners and academics claim that traditional strategic planning is no more suitable for organizations willing to successfully cope with the VUCA world due to the time it consumes and the rigidity it causes (Yang & Liu, 2012). As a result, firms began to move away from the obsolete concept (Prange & Hennig, 2019).

Consequently, a new trend of applying strategic agility among organizations was established (Weber & Tarba, 2014). Even though strategic agility is often characterized as a fast and hassle-free way of doing the strategy, in reality, it also requires much time to be invested into. Strategic agility involves the complex processes of hypotheses definition and testing that seem to be challenging for decision-makers. Nevertheless, it allows teams to carefully consider the decisions they want to make and test them before investing money and wasting resources for something that is not proven to be successful (Pichel & Müller, 2021).

When companies intend to adjust their business strategies, they face the challenge of smooth dealing with complex processes involved. This challenge requires both speed & agility and time & patience. Organizations recognized that in order to work on problems collaboratively and make the right decisions, they need to be supported by professionals (Schuman & International Association of Facilitators, 2005). Without external help, teams bear the risk of failure of strategic changes' introduction and implementation. Services provided by professional facilitators not only enable companies to avoid this risk and enhance their performance by moderating change management but also help them sustain their competitive advantage (Allison & Kaye, 2005; Reading, 2002).

As a consequence of the development of the VUCA world and an emerging need for embracing strategic agility while abandoning strategic planning, business leaders began to look for those professional facilitators who have an understanding of agile strategy-making. They are supposed to help companies become more agile and lead their way towards more flexible strategies which are able to respond to the dynamic environment. Therefore, modern strategy facilitators are expected to have the right competencies to help businesses pursue strategic agility (The Strategic Agility Institute, n.d.).

1.1 Problem Definition and Research Significance

As it was stated earlier, strategic agility has become a critical topic that attracts the attention of both researchers and business practitioners. While being acquainted with the process of strategic planning, most business leaders struggle to seamlessly apply strategic agility due to the novelty of the concept (Perfetti et al., 2018). Therefore, the need for the help of a facilitator is even more urgent. First, a facilitator invests a significant amount of effort in the careful preparation of dedicated workshops with defined objectives and suitable formats. Second, as a true professional, the facilitator has comprehensive expertise on the strategy and its elements, enabling a team to be provided with valuable insights and be carefully guided during the decision-making process (Schuman & International Association of Facilitators, 2005). Most importantly, the strategic agility facilitator educates teams on switching their members' mindsets and being more open and flexible under the conditions of the VUCA world (Keightley, 2017).

There are presumably specific enablers of strategic agility that strategy facilitators help to foster. However, there is no research evidence that defines what strategy facilitator needs to possess to enable companies and their teams responsible for strategy-making to pursue strategic agility successfully.

This thesis will bring value to strategy practitioners, especially strategy facilitators and the academic community. The information derived from this work will help strategy practitioners better understand the needs of companies they work for and improve their professional skills while adapting to the requirements of the VUCA world.

The study is also relevant for scholars since the academic environment is strongly focused on strategy practices and regularly conducts researches to gain more profound knowledge on this topic. The focus of the study on strategic agility makes it even more valuable since

the concept is developed much less than traditional strategic planning and has attracted many scholars (Doz & Kosonen, 2008a; Weber & Tarba, 2014).

Thus, the findings of this thesis will contribute to the understanding of the subject in focus and close the knowledge gap regarding the competencies and practices necessary for the facilitation of strategic agility.

1.2 Research Objectives and Research Questions

The main objective of this study is to help modern strategy facilitators be skilled enough to help their clients keep up with the requirements of the dynamic business environment they operate in. Since there is an active adaptation of strategic agility going on in the corporate world, the thesis will identify whether existing characteristics necessary to be a strategy facilitator are enough to facilitate strategic agility or it will be expected to have additional capabilities. Furthermore, this study aims to recognize whether some traditional skills of facilitators become obsolete and unnecessary in the context of strategic agility or they can still be applied in the new mode of strategy making. Based on the significance of the research and its objective, the author has defined the main research question (RQ 1) of the thesis as follows.

RQ1: “What are the emerging characteristics a strategy facilitator needs to acquire in order to help enterprises pursue strategic agility?”

The author has also developed the research sub-question (RSQ 1.1) as follows.

RSQ 1.1: “What characteristics could be transferred from strategic planning facilitation to strategic agility facilitation?”

After conducting the literature review, the author developed the second research question:

RQ 2: “Could the traits required from leaders of organizations pursuing strategic agility influence the development of characteristics needed for a facilitator of strategic agility?”

In order to answer RQ 2, the author has developed the research sub-question (RSQ 2.1), which is stated below.

RSQ 2.1: “What are the similarities between leaders’ traits needed for strategic planning and strategic agility, and what are the unique traits?”

1.3 Structure of the Paper

This thesis is structured in six chapters. This part is the first chapter. It introduces the reader to the topic and provides him/her with the problem definition and research significance, as well as with research objectives and research questions. The second chapter reviews the literature on the two main topics: organizational strategy and facilitation. It also identifies the research gap on the interconnection of these topics, which is the facilitation of agile strategy-making. The third chapter demonstrates the methodology chosen for the research, including the research model and research approach. The data for further analysis is collected through the additional literature review and a series of semi-structured interviews / mini-workshops with the facilitation expert. The secondary and primary data are analyzed through various coding methods. The fourth chapter presents the findings of the data analysis. Chapter number five provides the reader with the data analysis interpretation and discussion. There, the author identifies what characteristics of a strategic planning facilitator could be transferred to the strategic agility setting and what characteristics are unique for a strategic agility facilitator only. The sixth chapter concludes the thesis and demonstrates the limitations of the study, as well as makes suggestions for further research. Moreover, this chapter gives recommendations and implications for the practitioners. The last chapters, seven and eight, are dedicated to references used for this thesis and the appendix.

1.4 Domain Limitation

The thesis explores the requirements for the facilitation of agile strategy-making. However, this paper focuses on strategic agility as a process, while some scholars perceive it more as the content of the strategy. Moreover, the information for the analysis is obtained from the literature review and only one expert on facilitation. However, the expert has extensive knowledge on the topic acquired from the practical experience, and she was able to provide the author with a solid amount of information that was sufficient for writing the thesis.

Furthermore, the author of the thesis is not focused on a particular industry. The outcomes of the work only give an understanding of general prerequisites for facilitating agile strategy-making without taking into consideration the nuances of individual business sectors. Additionally, individual peculiarities (e.g., size or homogeneity) of teams that participate in the facilitated workshops are not taken into account. Yet, the

importance or relevance of some facilitator's characteristics might vary based on those peculiarities of teams. Nevertheless, the result of the thesis still provides practitioners and scholars with valuable information as it reveals the minimum requirements for strategic agility facilitation and serves as a starting point for further, more detailed research.

2 Literature Review

The available literature on such topics as organizational strategy and facilitation will be reviewed in the following sections. The first part will demonstrate the strategy as concept and then take a closer look at the two types of strategy-making – strategic planning and strategic agility. Afterward, the strategy as practice concept is examined as the author is particularly interested in the role people play in strategy-making.

The literature on facilitation follows as a second part of the review for the reason that facilitators are seen as strategy practitioners as well. Therefore, first, the concept of facilitation is explained. Then, the author demonstrates the role of facilitators in strategy-making. Finally, the facilitation of strategic planning is considered. However, there is no literature on the topic of facilitation of strategic agility available for review. Thus, the third part of this chapter is dedicated to establishing the research gap of the scientific literature.

2.1 Organizational Strategy

2.1.1 *Strategy as a Concept*

Hambrick (1983) described strategy as a pattern in the decisions flow, which has two functions: leading a company's sustainable positioning in line with its environment and creating the company's policies and procedures. When defined as a pattern in the decisions flow, strategy is meant to have shaped when a series of decisions demonstrates consistency in the course of time (Mintzberg, 1978).

Later, researchers added that it was necessary to go beyond simplistic considerations and take into account complex relationships between strategy, quality of its implementation, and a company's performance (Phillips & Moutinho, 2000).

Essential Elements of a Strategy

Hambrick and Fredrickson (2005) wrote that there were five essential elements of a strategy: arenas, vehicles, differentiators, staging, and economic logic (Figure 1).

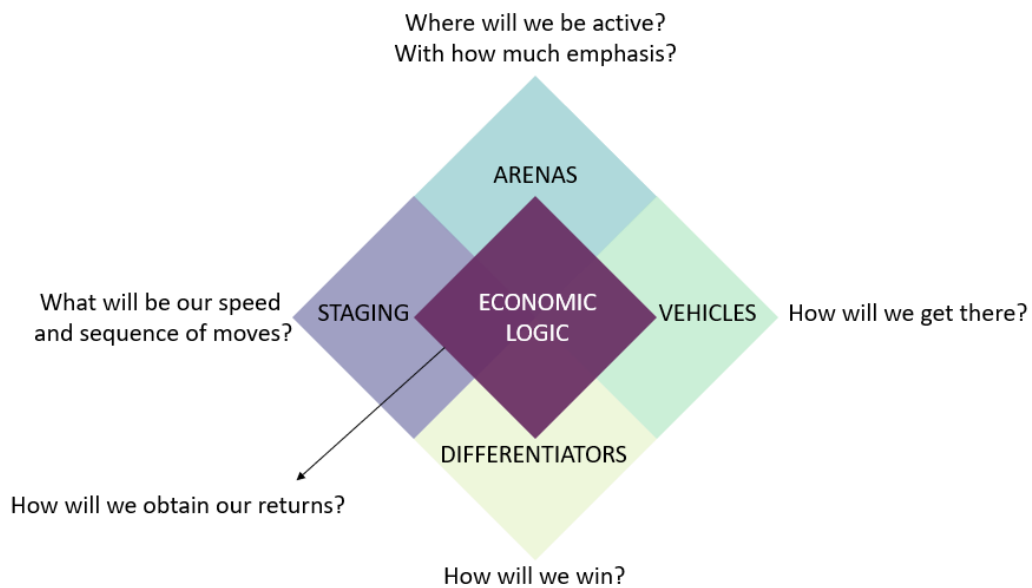


Figure 1. Five elements of Strategy (adapted from Hambrick & Fredrickson, 2005)

Arenas element means fields where a business will be active. There, companies need to be very specific when defining market segments, geographic areas, and other factors essential for the business. Vehicles are the means of how a company will reach the desired arenas. It is vital to have an encompassing logic and deal with things realistically while selecting the vehicles. Differentiators element is the approach of how a company will become a leader in the market segment. Examples of differentiators might be an image, price, or after-sale services – strategists need to think about them seriously to make the right choice matching with the company’s resources and capabilities. Staging refers to the speed and order of actions directed at achieving the primary goal. Resources, urgency, achievement of credibility, and pursuit of early wins are one of the factors that play an important role when deciding on the proper sequence of necessary steps. Finally, economic logic is the idea of how to make the company profitable (Hambrick & Fredrickson, 2005).

The quality of strategy is considered high when the strategy is in line with the environment, makes use of the company’s essential resources, has sustainable differentiators and internally consistent elements. Also, the strategy needs to be implementable, and the company should have resources for the implementation (Hambrick & Fredrickson, 2005).

Types of Strategy

As shown in Figure 2, Mintzberg & Waters (1985) identified two types of strategies: deliberate (realized as intended) and emergent (realized even without intentions).

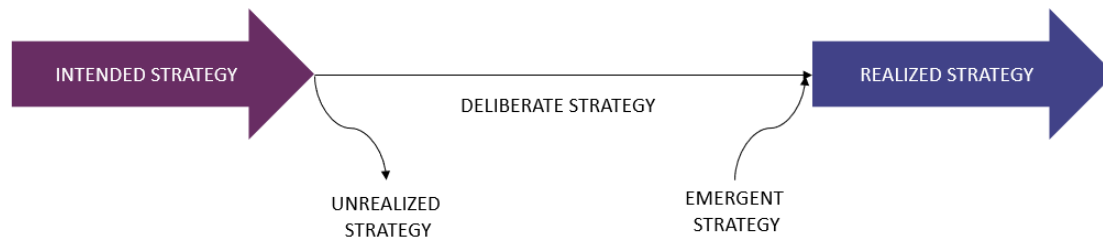


Figure 2. Types of strategies (adapted from Mintzberg & Waters, 1985)

For a strategy to be absolutely deliberate, the organization pursuing it has to have specific goals with a high level of detail to know what needs to be achieved before applying any measures. Moreover, everyone in the organization needs to have the same intentions in order to call them “organizational.” Finally, the organization's environment needs to be entirely predictable or totally controllable by the organization (Mintzberg & Waters, 1985).

For a strategy to be entirely emergent, the organization implementing it should have no specific intentions. However, the absence of intention has to imply consistency of actions the organization is taking (Mintzberg & Waters, 1985). This type of strategy is suitable for dynamic environments (Stonehouse & Pemberton, 2002).

Nevertheless, it is rather not possible that an organization’s strategy perfectly fits one of the two descriptions mentioned above. Therefore, researchers say that strategies usually only come close to the state of being deliberate or emergent but never go with one of the types purely (Mintzberg & Waters, 1985).

2.1.2 Strategic Planning

When Igor Ansoff published his book “Corporate Strategy” in 1965, the concept of “strategic planning” in business emerged (Mintzberg, 1994a). It was presented as an analytical way to strategically guide an organization in the business environment (Sirén & Kohtamäki, 2016).

Strategic Planning Defined and Explained

Today, there are multiple definitions of strategic planning created by different scholars. The fractional inconsistency of the operationalization of the concept is partly explained

by the tendency of specialists to analyze the correlation between variables rather than give them exact definitions. Moreover, researchers usually tend to aim their attention on specific fields of strategic planning and make an accent on them (Boyd & Reuning-Elliott, 1998).

The concept is defined as “the process of developing and maintaining a strategic fit between the organization and its changing marketing opportunities” by Kotler and Murphy (1981, p. 471). Bryson (2004, p. 6) identified strategic planning as “a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why it does it.” Rodríguez Perera and Peiró (2012, p. 749), in turn, wrote that strategic planning is “the systematic and organized process whereby an organization creates a document indicating the way it plans to progress from its current situation to the desired future situation. It is the set of decision-making criteria and the decisions taken and implemented by an organization to definitively and permanently guide its activities and structure”. The definitions presented in the paragraph are only a tiny fraction of the ones created by multiple scholars.

The figure below (Figure 3) presents the process of strategic planning.

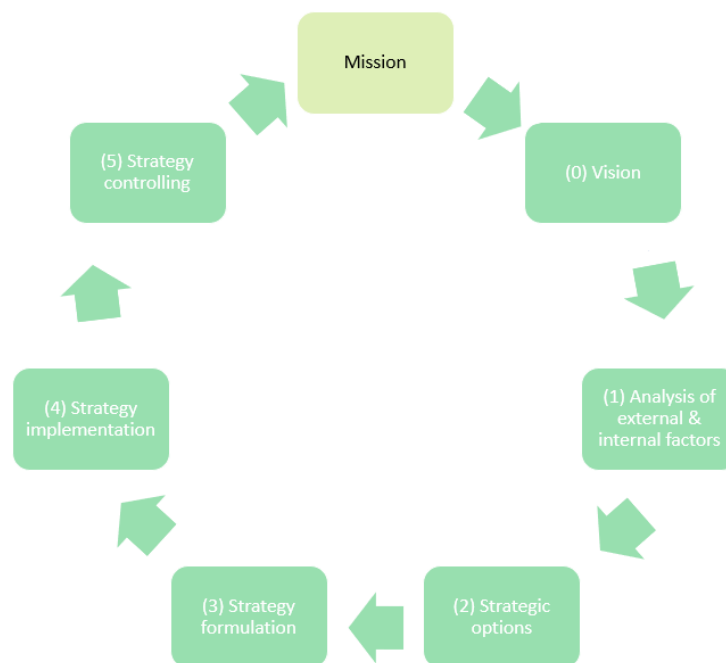


Figure 3. Strategic Planning Process (based on Schendel & Hofer, 1979)

What was agreed upon at the end of the 1990s is that strategic planning was employed in such areas as “performance relationships, competitive advantage, information

acquisition, and strategic decision-making, generic strategies, contingency modeling, and international studies” (Boyd & Reuning-Elliott, 1998, p. 181). Also, most definitions emphasize a systematic approach to the development of a strategy (Wolf & Floyd, 2017).

One of the aims of strategic planning is to put special attention to the first steps of the decision-making process in order to grasp emerging opportunities and look for new action strategies (Simon, 1993). Strategic planning interprets strategic decision-making as a sequence of activities that enables managers to decide on the appropriate strategic course for the whole organization (Andersen, 2000). Also, effective strategic planning should connect long-term strategic goals with mid-term and short-term operational ones. People responsible for strategic planning have to gather data, predict and plan alternative business scenarios (Glaister & Falshaw, 1999).

In order to prepare and implement strategic planning successfully, companies should include line managers in the planning process, accurately define business units, have a detailed blueprint of the set of actions, and make sure the strategic plan is aligned with other organizational processes ensuring control over an organization (Gray, 1986).

Leadership in Strategic Planning

Leaders are believed to be urgently crucial to the success of the strategic planning process (Balogun & Johnson, 2004; Burgelman, 1991). Researchers suggest that CEO’s active involvement in strategic planning is principal for lining organizational strategy up with the environment and business performance (Child, 1974; Miles et al., 1978). Some scholars also say that depending on how top management embraces strategic planning, it might be either empowering or intimidating for the organization (Adler & Borys, 1996). Ugboro (1991), for example, proved that there is a profound correlation between the involvement of the top management and the effectiveness of the strategic planning system of an organization. Indeed, in most companies, CEOs leverage their authority to influence the decisions concerning strategy-making (Drago & Clements, 1999).

Relevance of Strategic Planning

After the publication of Ansoff’s book, corporate leaders of that time found it essential for their strategy practices to be competitive (Mintzberg, 1994c). However, in the later years, some authors claimed that the concept became obsolete while others were confident that it was still a part of modern business practices (Jarzabkowski & Balogun, 2009).

Opponents of strategic planning wrote that the concept should have been disapproved since it did not allow strategists to be flexible enough and quickly adapt to changes. Instead, strategic planning made them use out-of-date tools and be ineffective (Ghemawat & del Sol, 1998; Mintzberg, 1994b; Weber & Tarba, 2014). There was also a lack of empirical evidence which could show that strategic planning positively influenced the performance of an organization (Andersen, 2000). In the survey conducted in 2005, only 11% of senior executives of more than 150 large companies were satisfied with the concept of strategic planning (Mankins & Steele, 2006). The question arose whether there was a fitting way to make strategic decisions that would help companies sustain their competitive advantage (Liedtka, 2000).

2.1.3 Strategic Agility

Nowadays, businesses have to deal with the unstable environment and constant radical changes to existing industries caused by continuing trends such as globalization, technological development, customers' tastes modification, and many others (Weber & Tarba, 2014). Therefore, it is advised to organizations to develop dynamic capabilities, cultivate high levels of flexibility, and improve knowledge management (Eisenhardt & Martin, 2000). In order to meet these requirements, researchers suggest businesses employing strategic agility (Weber & Tarba, 2014). According to Brueller et al. (2014), it allows organizations to modify their processes efficiently and face the VUCA world with confidence.

Strategic Agility Defined

Similar to the concept of strategic planning, strategic agility does not have a united definition (Weber & Tarba, 2014). For example, Roth (1996, p. 30) created the following definition for the concept: "the capability to produce the right products at the right time at the right place at the right price." Doz (2020, p. 1) defined strategic agility as "the ability to exploit, or create to one's advantage changing patterns of resource deployment in a thoughtful and purposeful but also fast and nimble way rather than remain hostage to stable pre-set plans and existing business models." Weber and Tarba (2014, p. 7) wrote that strategic agility was "the ability of management to constantly and rapidly sense and respond to a changing environment by intentionally making strategic moves and consequently adapting the necessary organizational configuration for successful implementation." Shin et al. (2015, p. 184) described it as a "firm's strategic intent to

achieve agile operations which are driven by the management emphasis on improving its time-based competitive advantage, namely responsiveness and adaptability to customers' needs and requirements”.

Even though the works of some authors mentioned above are widely used as references by scholars, it is not yet clear whether they describe strategic agility in terms of content or process. Since the author of this thesis seeks information on strategic agility in the decision-making process, she will use the following definition as a primary for this study.

Strategic agility is a “strategy-making with iteration loops to assess information and define strategic details, allowing companies to further develop and refine their strategy gradually according to the facts it generates.” This is one of the most recent definitions which has emerged from the work of Pichel & Müller (2021, p. 3). While implying elements of the earlier presented definitions, this definition will be employed throughout the rest of this thesis.

The strategy-making process of an organization implementing strategic agility is presented in Figure 4. Additionally, Gurkov et al. (2017, p. 18) proposed that there are four habitual activities in strategic agility:

1. “Strategizing” – setting up an ambitious purpose, establishing a shared strategy, controlling the commitment for strategy execution.
2. “Perceiving” – observing the environment to become aware of changes and communicate them to the decision-makers for them to work on rapid responses.
3. “Testing” – doing experiments and learning from them.
4. “Implementing” – implementing the changes and measure their performance.

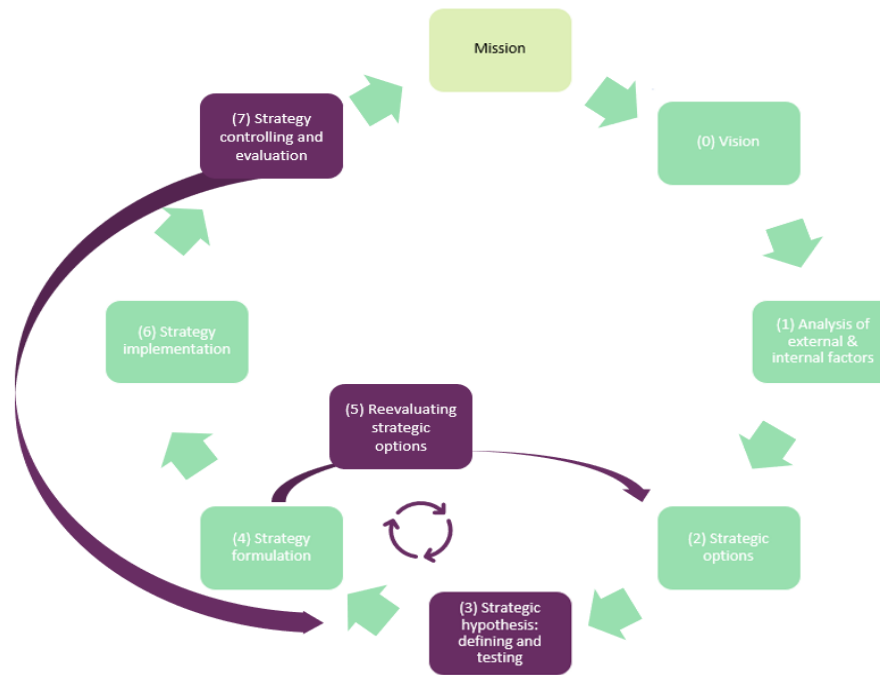


Figure 4. Agile Strategy Process (adapted from (Pichel & Müller, 2021))

Strategic Agility as a Modification of Strategic Planning

As it follows from the definition of strategic agility employed in the thesis and is seen in Figure 4, agility is required in the part of strategic decision-making (De Smet & Gagnon, 2018). Therefore, the modification of this part was introduced to the strategic planning (Cervone, 2014; Lyngso, 2014). Strategic agility provides strategy practitioners and scholars with a mindset and strategic approach which is aligned with the dynamic and sometimes contradictory environment to grant strategic planning new context and purpose (Vrontis et al., 2012).

Balancing concepts of strategic planning and strategic agility make organizations ambidextrous. Sometimes, however, it causes challenges as there are some inherent contradictions between the two paradigms (Lewis et al., 2014; Pichel & Müller, 2021). Scholars suggest that agility should be employed in those projects that are characterized by a high level of risk and uncertainty (Vinekar et al., 2006).

Strategic Agility Features

Even though there is no single definition of strategic agility, common themes are derived from the works of multiple researchers (Weber & Tarba, 2014). First, companies that employed strategic agility operate in the VUCA environment (Adler et al., 1999; Franken & Thomsett, 2013; Grewal & Tansuhaj, 2011; Judge & Miller, 1991; Wilson & Doz,

2011). Second, strategic agility produces efficient innovations in the processes and structures of an organization (Tallon & Pinsonneault, 2011; Weill et al., 2002). Third, it is essential to spot emerging changes and respond to them efficiently (Sanchez, 1995; Shimizu & Hitt, 2004; Volberda, 1997).

Fully strategically agile companies integrate agile principles into their strategy implementation. For example, strategic projects are managed with the help of agile principles (Davidson & Klemme, 2016). Moreover, a company's strategic position is also defined in an agile way using iterative loops, where strategic elements are adjusted, and necessary information is continuously gathered (Pichel & Mueller, 2018). Santala (2009) also stated that it should be the same group of people who works on planning and implementation as it is necessary to make adjustments to the strategy constantly.

Setting key performance indicators and defining objectives and key results is also essential to maintain strategic agility and see the value that strategic projects bring (Zhou & He, 2018). After the strategic projects are implemented, conducting evaluation (which must be in line with the overall organizational strategy) is necessary. Thus, new knowledge relevant for the company's further steps is gained, and the strategic team is ensured that its objectives are kept on track (Pichel & Müller, 2021).

Firms with strategic agility can efficiently modify their approach to maintain their competitive advantage (Goldman et al., 1995). This is confirmed by Judge and Miller (1991) as they write that agility allows a company to make decisions and consider all the possible alternatives simultaneously. Also, strategically agile companies can turn external changes into opportunities thanks to the responsive approach they have (Shin et al., 2015). Scholars wrote that, in addition to tackling external disruption, strategic agility also helped address internal challenges companies had. For example, organizations boosted their internal learning by defining the KPIs while doing agile strategy-making (Ivory & Brooks, 2018; Nejatian et al., 2019).

Pichel & Müller (2021) write that strategic agility helps organizations make correct strategic decisions and enable them to attract customers, advance product development, and create essential partnerships, all of which are important for new business ideas. Such organizations can focus on following their objectives while cost-effectively trying new business ideas (Di Minin et al., 2014). Overall, it was proven by several studies that

strategic agility improves firm performance (Kale et al., 2019; Ofoegbu & Akanbi, 2012; Tallon & Pinsonneault, 2011; Vickery et al., 2010; Yang & Liu, 2012).

Leadership in Strategic Agility

To achieve strategic agility, organizations need to foster capabilities that enable a quick transformation of established business practices (Bock et al., 2012). However, even though academics identified what the fundamental capabilities are (e.g., employing rapid prototyping to have a minimum viable product (Warner & Wäger, 2019), it is difficult for businesses to actually achieve and make use of them (Morton et al., 2018).

Some authors write that specific leadership measures and managerial proactiveness allow a successful pursuit of strategic agility (Doz & Kosonen, 2010; Vinekar et al., 2006). It is also hypothesized by Pichel and Müller (2021) that senior management still makes the final decisions in most agile organizations and thus has to be both participative and directive in order to implement strategic agility. Researchers claim that in order to enable strategic agility, managers have to imply paradoxical leadership (Lewis et al., 2014) and strategic persistence (Gurkov et al., 2017; Kisfalvi, 2000). Nevertheless, it is still difficult for corporate leaders and their executive teams to tackle the challenge of solving the strategic agility puzzle (Doz & Kosonen, 2008b; Lewis et al., 2014).

2.1.4 Strategy as Practice

The strategy as practice approach for studying strategic management and the organization's decision-making process has appeared in recent years (Jarzabkowski et al., 2007; Johnson et al., 2003; Whittington, 1996). The concept's growing popularity can be explained by the way the notion of the strategy was explored and developed before (Jarzabkowski et al., 2007; Jarzabkowski & Paul Spee, 2009).

Previously, the research about strategy was limited and regarded the concept as a system of economy-based interconnected variables where the human aspect played no significant role (Jarzabkowski et al., 2007; Jarzabkowski & Paul Spee, 2009). Later, however, the strategy started to be viewed as a “socially-accomplished activity” aimed at reaching strategic goals. It was something that people do rather than organizations have (Hendry et al., 2010, p. 34). Therefore, it was essential to switch the focus and gain a more profound knowledge of the actions of a strategy practitioner (Jarzabkowski et al., 2007).

Moreover, researchers wanted to better understand what exactly was essential in activities associated with strategy (Golsorkhi, 2010).

Strategy as Practice Components

Regnér (2008) writes that exploration and development of this topic will contribute significantly to the success of the subject of strategic management. Critical themes analyzed by the strategy as practice approach include strategizing, strategy tools, techniques of strategy, power in strategy, and other examples (Golsorkhi, 2010).

Strategy as practice studies three parameters (Jarzabkowski, 2005; Jarzabkowski et al., 2007; Johnson et al., 2007; Whittington, 2006):

1. Practitioners
2. Practices
3. Praxis

Jarzabkowski & Whittington (2008, p. 282) give the following definitions to the parameters:

1. Practitioners – “people who do the work of strategy, which goes beyond senior managers to include managers at multiple levels of the firm as well as influential external actors, such as consultants, analysts, and regulators.”
2. Practices – “social, symbolic, and material tools through which strategy work is done.”
3. Praxis – “the work that comprises strategy: the flow of activities such as meeting, talking, calculating, form filling, and presenting in which strategy is constituted.”

The strategy as practice approach also deals with skills and resources that people working in the organization bring for the flow of activities directed at strategy and how they affect this flow (Hendry et al., 2010). An efficient strategy practitioner needs to leverage strategy practices in his or her strategy praxis (Jarzabkowski & Whittington, 2008). As it is shown in Figure 5, three elements combined together produce strategizing, also known as doing of strategy or managing strategy (Jarzabkowski et al., 2007).

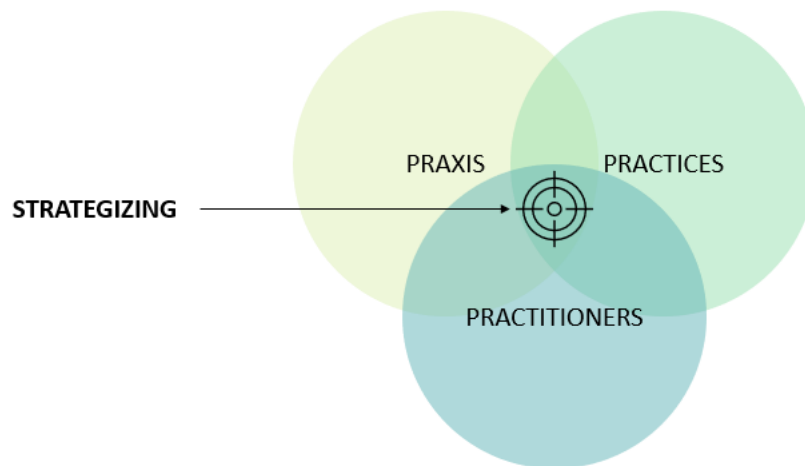


Figure 5. Conceptual framework of strategy-as-practice (adapted from Jarzabkowski et al., 2007)

Strategizing Types

Researchers identified two types of strategizing: procedural and interactive (Table 1). Procedural strategizing is concerned with formal administrative activities with the help of which the strategy is coordinated and ingrained into the organization. Interactive strategizing is associated with direct interaction between organizational actors in order to negotiate their understanding of organizational activities (Jarzabkowski, 2005).

Key Characteristics	Procedural Strategizing	Interactive Strategizing
Tone	Administrative, hierarchical	Interpretative, reciprocal
Flow of Information	Bottom-up, from management to board	Simultaneous top-down and bottom-up
Key Activities	Review, approve and monitor management’s strategy	Continuously build shared frameworks of meaning with management about strategy
Board’s Influence Mechanisms	Formal selection procedures/tools (plans, budgets) and diagnostic controls (financial performance indicators)	Face-to-face, formal and informal social exchange (open communication, persuasion and negotiation) and normative controls

Table 1. Procedural and Interactive Strategizing (Hendry et al., 2010)

Procedural strategizing usually helps to manage the existing strategy without frequent interaction of top management. However, with time this type of strategizing “may tend towards inertia” and stop being focused on the strategic goals but rather on administrative tasks themselves to follow the established earlier patterns (Hendry et al., 2010, p. 36).

Interactive strategizing depends on the organization's social aspect, which includes groups' communication and negotiation. Here, strategy is constantly being shaped by social exchanges and the influences of some organizational actors on others. This type of strategizing usually helps to introduce new strategies or newly interpret existing ones. However, the problem of interactive strategizing is that shared meanings of strategy might not last long. Thus, it needs to be seen not as episodic action but rather a series of actions during which the shared meanings are continually modifying (Hendry et al., 2010).

Even though procedural and interactive types of strategizing are different, they are not mutually exclusive (Hendry et al., 2010). In fact, they are even complementary since the advantages of one type offset the disadvantages of another type. Moreover, throughout the course of organizational evolution, the emphasis on one of the types might move back and forth (Jarzabkowski, 2005).

Facilitators as Strategy Practitioners

The increase in the worth of the social nature of strategy contributed to the scholars' desire to examine such practices as strategy meetings and workshops (Hodgkinson et al., 2006; Jarzabkowski & Seidl, 2008). While the majority of the literature is focused on the top management (Nag et al., 2007), some researchers have found that facilitators also play an essential role in strategy-making and are considered strategy specialists (Vaara & Whittington, 2012).

Indeed, it is said that the view of being a facilitator is matched with the strategy as practice view (Varyani & Mehdi, 2010). As strategy practitioners, facilitators help shape the content created during strategic meetings (Roos et al., 2004). They primarily work with the middle- and senior-level management and empower their members to unleash their abilities and develop a sense of strategic thinking (Varyani & Mehdi, 2010). Facilitators collect different points of view and aggregate them together, thus creating organizational knowledge. They also correct the strategic decision-making process by enabling team members to propose their suggestions or express their concerns regarding the decision-making process (Lavarda et al., 2010). Ultimately, if the strategy as practice approach tries to understand what people *do*, it is essential to look at facilitators and their activities, as they are the ones who assist the action of *doing* in the strategy-making process (Bowman & MacKay, 2020).

2.2 Facilitation

2.2.1 *Facilitation as a Concept*

Facilitation has its origins in professions where people are devoted to helping others (Zimmerman & Evans, 1993). Until the times when theorists of behavioral science recognized the need for bringing structure to complex group interactions, the concept of facilitation did not exist (Bens, 2018). Nowadays, facilitation is considered an essential skill, especially in teams where collaboration is required. Therefore, the demand for professional facilitators is constantly increasing (Rees, 2005).

Group facilitation is “a process in which a person whose selection is acceptable to all members of the group, is substantively neutral, and has no substantive decision-making authority diagnoses and intervenes to help a group improve how it identifies and solves problems and makes decisions, to increase the group’s effectiveness” (Schuman & International Association of Facilitators, 2005, p. 21).

Facilitation is a difficult task as it requires a lot of mental work, which is emotionally and cognitively demanding. It is also a challenge always to think and act systematically to help the groups (Schwarz, 2002). Moreover, there is a high probability of working with individuals with problematic behaviors and facing the challenge of not being influenced by these behaviors (Wayne, 2005). These and many other challenges make the contribution of facilitators to groups’ collaboration and productivity even more meaningful (Rees, 2005).

Facilitator’s Definition and Role

As for the facilitator’s role, there are multiple definitions. In fact, a facilitator could be both a factor that helps to achieve the desired goal (Tricarico & Geissler, 2017) and a person taking the facilitation role (Kiser, 1998). However, following the definition of facilitation, this thesis refers only to a person when mentioning a facilitator.

Even though definitions of a facilitator have some differences, common themes could be derived from them. Therefore, based on the works of McLagan & Bedrick (1983), Spencer (1989), Schwarz (2002), Rees (2005), and Townsend et al. (2009), the author has defined the role of a facilitator as follows.

A *facilitator* is a person with a neutral role and no decision-making authority who is responsible for making a group work easier by:

1. leading group discussions, guiding participation of group members, and helping to make decisions,
2. making people assess current issues and needs, helping them to improve the way the group identifies and solves problems, and making individuals learn,
3. making people feel committed and motivating everyone to achieve goals, and
4. initiating team building sessions and make teams cohesive.

A facilitator needs to increase the effectiveness of a group by upgrading its process and structure. The process is a way of how group members work together, and structure is a combination of stable and recurring group processes. There is also content, which concerns what the group is working on. Better processes and structure of a group assisted by a facilitator enable the group to solve problems and make decisions in an improved manner. Nevertheless, the facilitator should not intervene in the content of the group's discussions and not leave his or her neutrality behind. However, there are some cases when intervention is necessary (Schwarz, 2002).

Facilitative Roles

Schwarz (2017) describes the facilitative roles (Table 2), which highlight particular nuances of the role of a facilitator.

	Facilitator	Facilitative Consultant	Facilitative Coach	Facilitative Trainer	Facilitative Mediator	Facilitative Leader
Purpose	Help group use effective process to make decisions and increase its effectiveness	Provide expert advice on client's issues	Help an individual, group, or team achieve goals and increase effectiveness	Help people develop knowledge and skills	Help two or more people resolve a dispute	Influence a group to achieve goals and increase its effectiveness
Group Member	No	No	Can be	Can be	No	Yes
Involvement in Content	Content neutral	Content expert	May be involved	Content expert	Content neutral	Involved in content
Involvement in Content Decision Making	Not involved	May be involved	Not involved	May be involved	Not involved	Involved

Table 2. Facilitative Roles (Schwarz, 2017)

All the facilitative roles are based on the same principles and values as the role of facilitator (Schwarz, 2002). Contingent upon the case, a facilitator chooses what role or what combination of facilitative roles to take (Schwarz, 2017).

Facilitators' Levels of Competency

Rees (2005) writes that facilitators have three levels of competency (Figure 6) which are built on one another:

- Level 1: basic skills (allow leading team discussions and meetings)
- Level 2: team skills (allow coaching of teams)
- Level 3: organization-wide skills (allows leading important organizational changes)

Level I Facilitator
(Meeting Facilitator):

Someone who has completed basic facilitation training and successfully designs and facilitates short group meetings.

Level II Facilitator
(Team Facilitator):

An experienced Level I facilitator who is also qualified to facilitate the ongoing meetings of a team or group. Someone qualified to design and facilitate longer, more complex group meetings.

Level III Facilitator
(Organization Facilitator):

An experienced Level II facilitator who is also qualified to design and facilitate inter-team, and organization-wide meetings and projects.

Figure 6. Definitions of Facilitators' Levels (Rees, 2005)

Having only basic facilitation skills is often enough for professionals as teams need them solely to manage discussions and meetings. Facilitation of teams development already requires the second level of competency. Finally, to be able to go through organization-wide responsibilities such as, for example, strategic meetings, a facilitator has to reach the third level (Rees, 2005).

The areas of competency and experience that help define the level of a facilitator are the following: “credibility, judgment, human relations, risk-taking, business knowledge, learning orientation, self-management, workload management, presentation skills, role understanding and application, group skills and experience, listening, participation management and methods, meeting management, collaboration skills, designing meetings, coaching, understanding group dynamics, managing conflicts, conceptual and diagnostic skills, change management, feedback and evaluation, and building client relationships” (Rees, 2005, pp. 264–283).

2.2.2 Role of Facilitation in Strategy

Earlier, a person on top of the organization had to make strategic decisions solely alone. Nowadays, teams play a crucial role in the way an organization evolves and performs, and therefore, influence strategic development. One of the reasons for increased responsibility of a team rather than of an individual is more significant ramifications and ambiguity of problems an organization faces due to the dynamic environment (Vennix, 1996).

There is a common need to better use the knowledge and expertise of employees during a complex decision-making process (Robson & Beary, 2017), which facilitation can meet by integrating into this process managers and employees (Hogan, 2002). Reich (1987) wrote that leveraging the synergy of employees helped companies to stay competitive. Straus (2005) wrote that businesses start to understand the strategic importance of collaboration and stick to it only after finishing multiple collaborative efforts successfully. Afterward, top management starts to seek help for making collaboration the norm (Straus, 2005).

Need for Strategic Facilitator

Given the complexity of a team's challenges, its members often have contradictory views and opinions about the problems and their solutions. Sometimes, these differences are seen as advantageous as they give different perspectives on the situation and enable the team to be more efficient. On the other hand, such diversity of opinions might lead to internal conflicts and fruitless discussions. Subsequently, organizations develop poorly defined strategies and lose their competitive advantage (Vennix, 1996).

An external professional can focus on a process (with a fresh perspective) rather than on the outcome and can ask questions internal employees might be afraid to ask (Olsen, 2007). Facilitators taking part in strategic meetings enable all the meeting members to participate in the discussions and stop feeling observed and judged by leaders (Niederman & Volkema, 1999). Moreover, the objectivity of a facilitator as an outsider may help teams evaluate their ideas better and avoid the personal and social bias of some of the team members (Paulus & Nakui, 2005). It is essential for a good strategy that team members learn from one another and come to a consensus (Checkland, 1985).

Expert Consulting versus Process Consulting

Frequently, facilitators help organizations by finding what lacks in their strategic processes and pinpointing what needs to be added. Those facilitators are problem-focused. They analyze their clients' problems and tell them what to fix or what to do differently and how to do it exactly. This approach is called expert consulting (Troxel, 2005). Expert consulting involves advising, knowledge and information transfer, and making recommendations (Zerfass & Franke, 2013).

The other form of consulting – process consulting – is people-focused. In this setting, a facilitator believes that team members are the key to problems solution. Process consulting focuses on people's desires and on leveraging their strengths rather than telling them what to do based on the facilitator's assumptions. Process consultants help organizations develop various scenarios, sort them out and implement the most appropriate ones (Troxel, 2005). This approach includes giving organizations structures and processes directed at methods and techniques of solving particular problems. Such consulting aims to enable teams to solve their problems and make decisions independently with the help of a professional who facilitates their discussions and clarifies the processes (Kubr & International Labour Office, 2002).

Even though the two approaches (Figure 7) are usually contrasted to each other, the facilitators often mix them in their practices and shift roles to adjust to the particularities of a situation (Troxel, 2005).

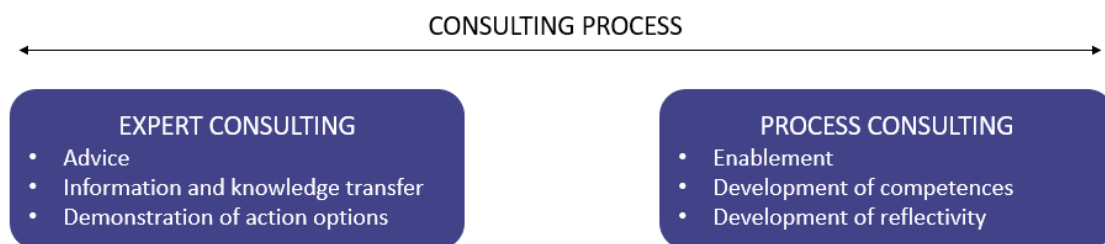


Figure 7. Consulting Approaches (adapted from (Zerfass & Franke, 2013))

2.2.3 Facilitation of Strategic Planning

According to the works of multiple researchers, when it comes to the facilitation of strategic planning, there is a specific set of qualities, competencies, and functions that a professional facilitator has to have in order to be a fit to help the organization (Bens, 2018; Goodstein et al., 1993; Olsen, 2007; Reading, 2002; Trainer, 2004; Wilkinson, 2004).

Strategic Planning Facilitator's Qualities

Based on the works of Wilkinson (2004) and Olsen (2007), the author has derived the following qualities necessary for strategic planning facilitators.

1. A facilitator needs to be willing to help others and follow the interests of their clients while putting his or her own interests and ego aside.
2. A facilitator has to have excellent communication skills.
3. A facilitator has to be both empathetic and authoritative.
4. A facilitator has to be fair and honest with everyone.
5. A facilitator has to be self-disciplined, logical, and consistent.

Strategic Planning Facilitator's Competencies

Based on the works of Wilkinson (2004), Olsen (2007), and Bens (2018), the author has derived the following competencies necessary for strategic planning facilitators.

1. A facilitator has to help those responsible for strategic planning to understand the importance of collective decision-making.
2. A facilitator has to create such a setting where everyone feels encouraged to express his or her thoughts and ideas.
3. A facilitator needs to be able to make the group understand and accept everything that is given or communicated by the facilitator.
4. A facilitator has to fully understand the organizational issues of the client.
5. A facilitator has to have experience in conducting strategic planning workshops.
6. A facilitator has to be able to apply theoretical concepts of such topics as leadership, team development, experiential learning, etc.

Strategic Planning Facilitator's Functions

Based on the works of Goodstein et al. (1993), Reading (2002), Wilkinson (2004), and Olsen (2007), the author has derived the following functions necessary for strategic planning facilitators.

1. A facilitator needs to guide the group members through the course of steps defined in advance to achieve the result, which is created collectively and accepted by everybody.
2. A facilitator has to motivate the group members (and convince the reluctant ones) to take part in the strategic planning discussions and keep them enthusiastic.
3. A facilitator has to stimulate the thinking of the group members.

4. A facilitator has to recognize the tendency of the group members to be unrealistic (too optimistic or too pessimistic) about the future and prevent them from this tendency by challenging their assumptions and expectations.
5. A facilitator has to ensure that a group came to a consensus rather than a compromise.
6. A facilitator has to ask questions and summarize the data.
7. A facilitator has to analyze the collected information and present it to others with clarifications.
8. A facilitator has to enable the group to stop having circular discussions.
9. A facilitator has to manage the resistance to changes associated with strategic planning smoothly.
10. A facilitator has to spot and handle conflicts within the group.

2.3 Research Gap

Based on the defined research objectives and research questions, the author has reviewed and synthesized the available literature, the topics of which were interrelated.

The literature review started with the topic of strategy (as a concept). Further research was conducted on the topics of strategic planning and strategic agility - traditional and emerging types of strategy making, and what constitutes them. The review showed that the scholars are massively focused on the notion of the strategy as practice to expose the significant role a human aspect plays in the strategy-making process. Therefore, the author paid particular attention to strategy facilitation to see what characteristics a strategy practitioner (here, facilitator) has to have while helping companies develop their strategies.

The literature review has given valuable information regarding the necessary characteristics a facilitator has to have to help companies embrace strategic planning. Furthermore, it gave a better structure for the RQ1 and RSQ 1.1 as the literature classified characteristics and broke them down to qualities, competencies, and functions needed for facilitators.

However, there are still no scientific works available that might answer RQ1 about the qualities, competencies, and functions a facilitator needs to have to help organizations pursue strategic agility.

Therefore, the author assumed that identifying specific traits of strategy-making leaders will be helpful for understanding emerging characteristics needed for facilitators of strategic agility. This assumption is derived from the fact that the model of strategy as practice was considered earlier. The author wants to use it not only to consider facilitators as strategy practitioners but also to consider top management as a contributor to the human aspect of strategy-making.

More importantly, in both strategic planning and strategic agility, leaders play dominant roles in the strategic decision-making process. Multiple scholars argue that strategic agility requires some specific leadership skills and managerial proactiveness. As for strategic planning, a correlation is found between strategic planning performance and top management involvement. Thus, the author has decided to try to develop the qualities, competencies, and functions needed for the facilitator of strategic agility based on the traits necessary for leaders of strategically agile organizations.

Therefore, the thought behind the author's attempt to identify facilitator's characteristics is that by enabling leaders to acquire necessary traits, facilitators will indirectly lead organizations to be strategically agile. For this reason, research question 2 (RQ 2) and its sub-question (RSQ 2.1) appeared.

Based on the missing information which is necessary for answering the main research questions and research sub-questions, the author has constructed the figure showing the research gap (area highlighted with a blue line) of the available literature (Figure 8).

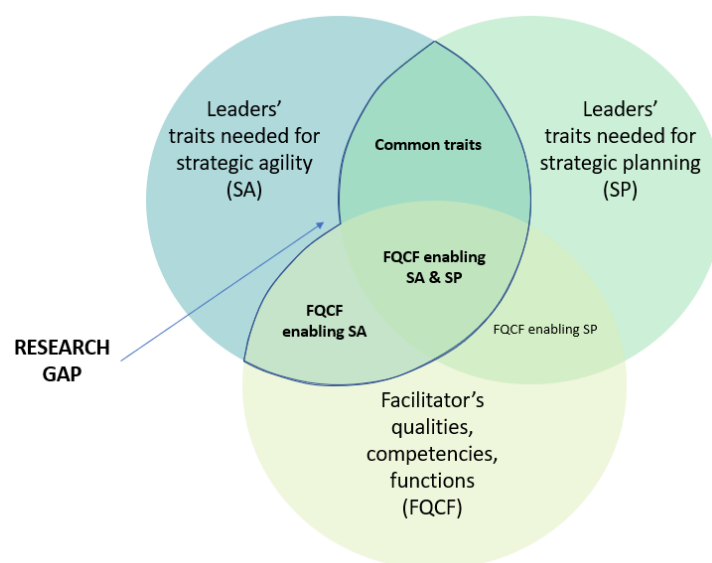


Figure 8. Research Gap (own illustration)

3 Methodology

To meet the research objectives of this study and answer the research questions, the author constructed the research methodology presented in the following sub-chapters.

3.1 Research Model

Based on the literature review and the research gap identified, the author created the research model presented in Figure 9. The model aims to help the author answer the research questions and the sub-question.

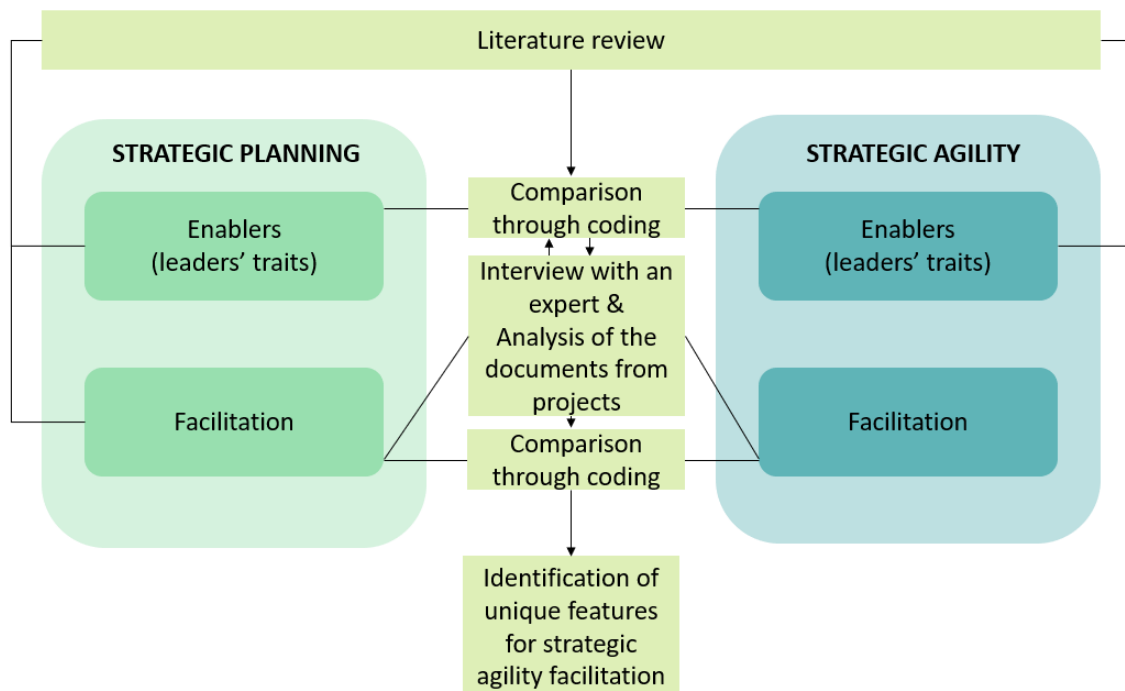


Figure 9. Research Model (own illustration)

3.2 Research Approach

To answer the research questions of this paper, the author decided to conduct qualitative research. Qualitative research helps collect and analyze non-numerical data that is not subject to measurement or counting. The reason for choosing the qualitative approach is the author's goal to provide the in-depth description of specific qualities, competencies, and functions needed for a facilitator to help organizations pursue strategic agility, which can be achieved through the investigation of the viewpoints of strategy practitioners. Generalizations will be made based on the gathering of secondary (review of additional literature) and primary data (discussions with an expert). The objective of the research is

exploratory as the topic in focus is not explored by other researchers and needs to be defined and uncovered.

The process of the research approach is presented below (Figure 10).

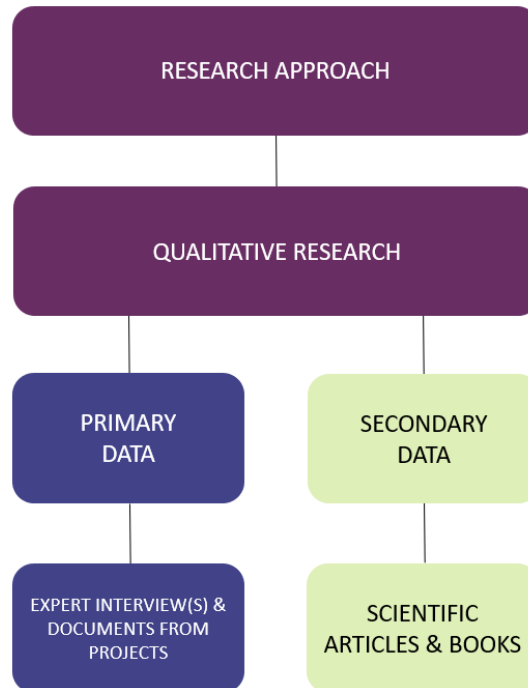


Figure 10. Research Approach Process (own illustration)

3.3 Secondary Data

Secondary research in this paper is used for identifying the leadership traits needed for strategic decision-makers of an organization to employ a) strategic planning and b) strategic agility. It is further used for filling the research gap regarding the commonalities and differences between the two groups of traits. Hence, the basis for the further empirical part of the thesis, which includes the collection and analysis of primary data, is provided.

3.3.1 Data Collection

Data is collected from the academic articles and books written by researchers and practitioners in the field of strategic management, business consultancy, and strategy consultancy. The literature about strategic planning and strategic agility is analyzed. To collect the necessary data, the author mainly considered the sections about leadership and its required traits during the literature analysis.

3.3.2 Data analysis

The data collected is analyzed with the use of coding in order to compare the strategy makers' traits needed for strategic planning and strategic agility. The author chose the initial coding as it allows to fragmentize the data into discrete pieces. It further helps closely examine the qualitative data and identify similarities and differences between the leaders' traits needed for two types of strategy-making. The chosen type of coding is said to be suitable for analyzing textual data and is recommended to be used by beginning qualitative researchers (Saldaña, 2009).

Coding Process

Since leadership traits derived from the scientific works and books are not considered raw data and already have operationalized definitions, the author decided to conduct only one cycle of coding (initial coding) and not proceed with the second-cycle methods.

The author first combined all the leadership traits necessary for strategic planning and broke down their definitions into several codes. Then, the codes of an individual definition that were similar to the ones of other definitions were removed in order to avoid redundancy. The same procedure was conducted with the leadership traits needed for strategic agility. In the end, the codes of strategic planning and strategic agility were compared, and unique codes were then regarded as unique leadership traits. At the same time, repeating codes were interpreted as shared leadership traits (both for strategic agility and strategic planning). The coding process is presented in Appendix 8.2. The unique and similar traits are further verified with the expert through the interview (the process is described in sections 3.4.1 and 3.4.2).

3.4 Primary Data

Primary research is conducted in order to collect information regarding the qualities, competencies, and functions a facilitator needs to have to help strategy makers of companies gain needed traits and consequently help organizations employ strategic agility. The data is further used to compare it with the qualities, competencies, and functions a facilitator needs to help companies employ strategic planning. Strategic planning facilitators' characteristics are identified with the help of a literature review. The comparison is conducted to define differences and commonalities that will lead to the answer to the main research question concerned with the emerging characteristics

required to facilitate strategic agility (RQ 1) and the sub-question regarding the characteristics that could be transferred from the strategic planning setting (RSQ 1.1).

3.4.1 Data Collection

The data is collected from the first-hand experience of the strategy facilitation practitioner (professional strategic planning & strategic agility facilitator) through the form of semi-structured interviews. Despite the fact that only one person is chosen as a source of the primary data, the collected information is rich and deep enough to make the first steps towards the closure of the research gap. In point of fact, the expert was able to provide the author with different types of information (i.e., leadership traits, facilitation characteristics, real workshops examples), which enabled the author to conduct multiple interviews and analyze the issue in focus from different angles.

The expert and the author had three interviews-workshops which were held online on the 2nd, 14th, and 22nd of July. Each interview was lasting 2 hours 25 minutes, 1 hour 43 minutes, and 25 minutes, respectively. The meetings were conducted with the use of the communication platform Microsoft Teams. These meetings were digitally recorded and transcribed for further analysis. The transcripts of each meeting could be found in Appendices 8.3 & 8.6.

The expert and the author of this paper organized a series of small workshops where the author first presented her findings regarding the traits of leaders and discussed them with the expert. Afterward, the expert was interviewed on the topic of characteristics needed for the facilitator to enable companies to pursue strategic planning, based on the author's findings from the literature review. The expert often extensively commented on each characteristic and indicated whether they could be transferred to the strategic agility setting. Moreover, the expert gave examples of how facilitators employ the characteristics in real life. The examples were supported by the documents (PowerPoint presentations containing workshop materials) from the workshops conducted by the expert and by the scientific works (i.e., Master's Theses) of people analyzing strategic agility processes of particular companies.

3.4.2 Data Analysis

Leadership traits

After identifying leadership traits through initial coding of the secondary data, the author decided to verify her findings by conducting an interview with the expert. The primary data collected from the interview was coded as well.

The author used three types of coding. First, the magnitude coding was applied as a first cycle coding to identify whether the unique strategic agility traits and shared traits (between strategic planning and strategic agility) were selected correctly. The magnitude coding applies symbolic codes to data to indicate the direction of its content (Saldaña, 2009). Therefore, the author put the following questions: a) Unique? – for the preliminary unique strategic agility leadership traits, and b) Shared? – for the preliminary shared leadership traits. Afterward, the following codes were implied: “Y” for yes, “N” for no, “M” – for maybe, and “?” for not clear. Pattern coding was applied as a second cycle method. Researchers use it to develop category labels for similarly coded data (Saldaña, 2009). The author also used initial coding again for some of the traits to explain why they were labeled in a certain way or to add the details which were given by the expert during the interview.

Facilitators’ functions, competencies, and qualities

After presenting the expert the characteristics of a strategic planning facilitator, the author wanted to see which of them could be applied to the strategic agility facilitator as well and which ones were different. Therefore, the author used the magnitude coding with the following symbolic codes:

- “S” for “the same,” meaning that there are no differences between characteristics of facilitators;
- “D” for “distinct,” meaning that there are some particular distinctions in the characteristics when it comes to strategic agility setting;
- “N” for “not applicable,” meaning that the comparison is impossible to make due to particular reasons.

Following the magnitude coding, the author used in vivo and descriptive coding methods to break down everything that the expert said into separate elements and derive more details regarding each characteristic. Descriptive coding compiles the core topic of an excerpt from qualitative data, while in vivo coding captures the judgment of a speaker (Saldaña, 2009). Subsequently, the “themeing the data” method was applied to understand

what “the same,” “different,” and “not applicable” codes mean exactly in each characteristic.

In vivo and descriptive coding methods were also applied for the “miscellaneous” information. During the interview, the author sometimes asked follow-up questions, the answers for which gave additional details regarding facilitators’ characteristics. These pieces of information are not applicable for the magnitude coding and themeing used by the author earlier. However, some valuable facts could be derived with the help of in vivo and descriptive coding methods as a first cycle and focused coding (for developing the categories of the data provided and understand the central message of the expert) as the second cycle of coding. The process of coding could be found in Appendix 8.5.

Cases-examples

The examples proving the existence of particular characteristics of facilitators given by the expert were also analyzed through coding. The author chose descriptive and in vivo coding methods for the first cycle to understand the content of the information given and break it down into independent elements. The pattern coding method was used for the second cycle to identify common patterns of the codes derived from the first cycle. The patterns were further used to establish the themes being present in the examples to set up the structure for the cases description, displayed in the findings part of the thesis. The process of coding could be found in Appendix 8.7. The author also looked through the workshop materials provided by the expert and associated Master’s theses of previous years to support the information given during the interview.

The overview of all the coding methods used during data analysis is presented in the figure below (Figure 11).

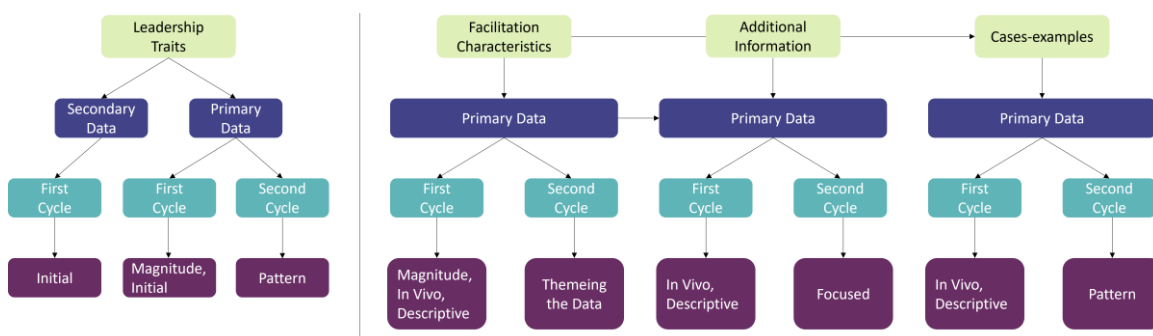


Figure 11. Coding Methods Overview (own illustration)

4 Findings

This chapter analyses the content of the collected secondary and primary data. The results of the analysis will serve as a basis for the content of chapter five, “Discussion.”

4.1 Leader’s Traits Identification

The author has conducted an additional literature review and its content analysis to identify what traits leaders should possess to employ either strategic planning or strategic agility in their organizations’ strategy-making process. The findings of the respective analysis are presented in the following sub-sections.

4.1.1 Leaders’ Traits Needed for Strategic Planning

The author used the works of Syrett (2007), Daniell (2006), and Kourdi (2003) to extract the traits needed for top management to embrace strategic planning in their companies. The complete list of traits and their original definitions are presented in Appendix 8.1.1.

The author of this thesis decided to eliminate the redundancies among the traits taken from the three authors (Syrett (2007), Daniell (2006), and Kourdi (2003)) and applied an initial coding in order to break the definitions down to separate components (codes) and compare all of them.

First, the traits defined by Syrett (2007) and Daniell (2006) were compared. Then, after the repeating codes were excluded during the first comparison, the residual codes were compared to the traits defined by Kourdi (2003). During the second comparison, the repeating codes were disposed of again. The final list of the leaders’ traits (and their components) needed for pursuing strategic planning is presented in Table 3. Where stated N/A (not applicable), the traits do not have any additional components.

Nr.	Trait	Components
1	Instilling focus and clarity	Establishing clear goals, measuring if goals are kept on track, involving people from different levels of an organization, giving employees the freedom
2	Generating engagement and commitment	Having open dialogues, creating an atmosphere of respect, empowering collaboration, calling for initiatives
3	Allocating scant resources	Allocating resources strictly according to a plan
4	Fostering collaboration	Trying to achieve best results, combining own interests with the ones of others, encouraging cooperation, making everyone feel a part of a community

5	Creating the right milestones of achievement	Inspiring commitment, coaching and developing employees, giving employees the authority, giving employees support
6	Managing pace	Identifying challenges, forming issues for employees to tackle, giving employees freedom, challenging existing roles of employees, keeping the organization in the state of changes, identifying goals to achieve, not trying to keep everything in order
7	Stating priorities clearly	N/A
8	Being an example	N/A
9	Going beyond the conventional	Valuing the past, aiming at differentiation, being creative, taking informed actions
10	Leading from the front	Communicating vision, communicating collective direction, communicating effectively, remaining positive, communicating policies and priorities, demonstrating a sense of confidence, demonstrating belief, not demonstrating uncertainty and hesitation
11	Influencing others	N/A
12	Getting the job done	Executing
13	Making evidence-based decisions	N/A
14	Having perception and sensitivity to analyze competing options and helping others to find their solutions	Identifying critical issues, thinking critically, taking different perspectives
15	Having trust	N/A
16	Having the capacity to motivate others to prevent and solve problems and proactively implement the decisions	Analyzing causes of motivation, analyzing factors influencing employees, identifying leader's role
17	Focusing others on serving customers and managing change	Making evidence-based decisions, forecasting future changes
18	Having skilled communication	Communicating possible problems, communicating future benefits, communicating constantly

Table 3. Strategic Planning Leaders' Traits

4.1.2 Leaders' Traits Needed for Strategic Agility

The author used the works of Doz (2020) and Wiraeus et al. (2019) to extract the traits needed for top management to embrace strategic agility in their companies. **Even though it is arguable whether Doz (2020) described the strategic agility process and not the content, the author of this paper has assumed that the identified traits for leaders are applicable for the decision-making process (thus, they are suitable for the strategic agility process) as well.** The complete list of traits and their original definitions are presented in Appendix 8.1.2.

It was decided to eliminate the redundancies among the traits taken from the two authors (Doz (2020) and Wiraeus et al. (2019)) as well. Therefore, initial coding was used again to break the definitions down to the separate components (codes) and compare them.

In contrast to the comparison of traits needed for strategic planning, there was only one round of comparison of traits needed for strategic agility. However, the process of the comparison was identical. The final list of the leaders' traits (and their components) needed for pursuing strategic agility is presented in Table 4.

Nr.	Trait	Components
1	Time availability	Devoting time, making discoveries, interacting with outsiders
2	Focused curiosity	Understanding the surroundings, implying surroundings to strategy
3	Creative thought process	Producing something new by seeing new patterns in existing elements
4	Bias for action	Having the ambition to be better, challenging the status quo, trying new things
5	Reliance on peripheral players	Sending people to the periphery, making people be distant from the center, teaching people to think critically, making people have diverse experiences, making people be agile
6	Judgment suspension	Accepting ambiguity, considering new suggestions, not relying on personal emotions, not relying on one's own experience
7	Contextual awareness	Catching nuances
8	The balance between abstraction and details in language	Combining firm's specification and overall generalization of the situation
9	System thinking	Seeing system as a whole, identifying interdependencies within a system, seeing an evolution of system's actors, seeing reconfiguration of system's actors
10	Option logic	Conducting experiments, being able to de-commit from the initial decision
11	Contingent commitments and adaptive learning	Shifting commitments, having conditional commitments
12	Matrixed processes	Allocating resources flexibly, having mutual responsibility for the performance
13	Fostering adaptation, not control	Having workplace configurations, selecting peers from the same level of organization, having pressure mechanisms, not having hierarchical control
14	Project rather than a position	Creating flexible job tasks, seeing career as a sequence of projects and experiences
15	Self-sufficiency and mutual forbearance	Knowing own strengths and weaknesses, knowing the capability of taking risks, having reflection sessions, giving oneself feedback
16	Cabinet responsibility	Making decisions collectively, having collectives responsibility for decisions outcome
17	Generalized reciprocity	Helping each other, sharing advantages

18	Mutual knowledge of skills, roles, and motives	Sharing knowledge and expertise, understanding knowledge and expertise of others
19	Cognitive diversity / Decision integration	Having various cognitive styles at work
20	Seeing changes as strength	N/A
21	Being able to make evidence-based decisions	N/A
22	Being visionary	Staying focused during volatile times
23	Following new trends	N/A
24	Communicating vision	N/A
25	Executing fast	Being efficient

Table 4. Strategic Agility Leaders' Traits

4.1.3 Leaders' Traits Comparison

Comparison Based on Coding (1st round)

After having identified the traits needed for leaders, the author had to make a comparison round again. However, this time, the traits of strategic planning and strategic agility were compared. By means of using the components (codes) of lists presented in the previous sub-sections, the author was looking for the codes (frequently, the codes were not identical, but they had the same meaning), which were present both in the strategic planning and strategic agility. This way, the shared traits were identified. The residual codes were characterized as unique leadership traits.

The table below (Table 5) presents unique strategic agility leadership traits and the leadership traits appearing in both strategic agility and strategic planning. **This finding answers the research sub-question 2.1 (RSQ 2.1) of this paper.**

Nr.	Unique Strategic Agility Traits	Shared Strategic Agility & Strategic Planning Traits
1	Devoting time	Making discoveries / Trying new things
2	Interacting with others	Understanding the surroundings and implying them to strategy
3	Sending people to periphery / making people be distant from the center	Producing something new by seeing new patterns in existing elements
4	Teaching people how to think critically	Having ambitions to be better
5	Making people have diverse experience	Challenging the status quo
6	Accepting ambiguity	Considering new suggestions
7	Combining firm's specification and overall generalization of the situation / Seeing system as a whole / Identifying interdependencies within a system / Seeing evolution of system's actors / Seeing reconfiguration of system's actors	Not relying on personal emotions
8	Conducting experiments	Not relying on personal experience

9	Being able to de-commit from the initial decision / Shifting commitments / Having conditional commitments	Catching nuances
10	Allocating resources flexibly	Having workplace configurations
11	Having mutual responsibility for performance / Having collective responsibility for decisions outcomes	Selecting peers from the same organizational level / Not having hierarchical control
12	Seeing career as a sequence of projects and experiences	Having pressure mechanisms
13	Knowing one's own strengths and weaknesses	Creating flexible job tasks
14	Knowing one's own capability of taking risks	Having reflection sessions
15	Giving oneself feedback	Making decisions collectively
16	Having various cognitive styles at work	Helping each other / Sharing advantages / Sharing knowledge and expertise / Understanding knowledge and expertise of others
17	Staying focused during volatile times	Seeing changes as strength
18	Following new trends	Making evidence-based decisions
19		Communicating vision
20		Executing fast / Being efficient

Table 5. Leaders' Traits Comparison (1st Round)

Comparison Based on the Interview (2nd round)

After making the first round of comparison of leadership traits needed for strategic planning and strategic agility, the author decided to verify her findings with the expert and make the second round of the comparison.

The second round of comparison (which could be found in Appendix 8.4) revealed that from 18 initially identified unique leadership traits needed for strategic agility, only two happen to be doubtlessly unique: "accepting ambiguity" and "conducting experiments." The expert also added that apart from only accepting ambiguity, the leader of a strategically agile company also had to deal with it and leverage it.

Two traits ("staying focused during volatile times" and "being able to de-commit from the initial decision / having shifting and conditional commitments") could also go to the category of unique traits; however, it was not explicitly stated. Nevertheless, the expert said it was more given and taken more seriously in the strategic agility setting when talking about volatile times. In strategic planning, decisions are made quicker, and leaders know what to do and what comes next. However, even though it was stated that there were less volatile times in strategic planning, this statement did not explicitly imply that strategic planning leaders do not have volatile times at all.

Three traits were said to be not applicable to strategic agility at all for the following reasons. One of them (“having mutual responsibility for performance / having collective responsibility for decision outcomes”) is not practiced in reality, rather only in theory. Even in strategically agile organizations, the board is still responsible for the strategic direction of a company and the final decision-making. There is also a specific role for a hypothesis owner. The expert said that fully collective responsibility might not be realizable; she believes that this picture is still too ideal.

The second trait (“seeing career as a sequence of projects and experiences”) was stated to be not a part of strategy-making processes. Moreover, the expert said she did not have enough experience in dealing with strategically agile leaders to provide a detailed comment on this trait.

The third trait (“following new trends”) had rather a wrong formulation and was put by the expert as “testing the relevance of new trends.” The rest of the traits had to be classified as shared between strategic agility and strategic planning.

As for the shared traits identified by the author during the first comparison round, only 14 out of 20 were proved to be true after conducting the interview with the expert. Four traits were said to be not applicable to either of the strategy-making types.

The first trait, “selecting peers from the same organizational level / not having hierarchical control,” is not supposed to be part of the strategic decision-making. Moreover, in some cases, companies have to have hierarchies. The second trait, “creating flexible job tasks,” is not a part of the expert’s experience. Therefore, no comment was made on this one. The third trait, “seeing changes as strength,” is not formulated correctly in the expert’s opinion. Changes should be seen as a source of information, not necessarily strength. The fourth trait, “communicating vision,” is also not formulated in the right way. A leader should align the vision with his or her thoughts and the company’s direction rather than communicate it.

Two traits (“not relying on personal experience” and “not relying on personal emotions”) were identified as being more given in strategic agility. The expert explained that since leaders had more experience in strategic planning, they could rely on their existing knowledge. In strategic agility, however, it is crucial to make evidence-based decisions. Therefore, relying on personal experience or emotions is not enough. However, it was also stated that this trait was still not wholly unique. Therefore, the author could not

identify it neither as “unique for strategic agility” nor as “shared between strategic agility and strategic planning.”

In conclusion, only two leadership traits can be evidently classified as being unique for leaders of strategically agile organizations.

4.2 Facilitators’ Functions, Competencies, and Qualities Identification

The author has conducted a series of mini-workshops with the facilitation expert in order to compare the characteristics of the strategic planning facilitators with the ones of strategic agility facilitators. Namely, it was interesting for the author to know which characteristics could be transferred to the agile setting, which had particular distinctions, and which ones were not applicable at all. In order to interpret the information given by the expert, various coding methods were applied. The findings of the respective analysis are presented in the following sub-sections.

4.2.1 Qualities

The interview with the expert revealed that from the six qualities of a strategic planning facilitator, two are applicable to strategic agility facilitators without any modifications. These are 1) “ability to follow the interests of the clients while putting own interests and ego aside” (short: the ability to follow the interest of the clients) and 2) “excellent communications skills.”

The ability to follow the interests of the clients: Even if a facilitator thinks that she or he knows the solution and sees what a company has to do, it is needed to understand that the decision-making outcome is always up to the company. Team members have to make decisions themselves as they know better what they need. This situation is always the case for both traditional and agile settings, and there is no difference.

Excellent communication skills: No comments were made on this quality, but the expert confirmed that it also applied to the strategic agility facilitator.

Other four qualities – 1) “willing to help others,” 2) “being both empathetic and authoritative” (short: empathy and authority), 3) “being fair and honest with everyone,” and 4) “being self-disciplined, logical, and consistent” – have particular distinctions in strategic agility settings.

Willing to help others: The primary distinction is that this quality has to be more specified and broken down into particular components for strategic agility facilitators. It was stated by the expert that the exact help that top management teams needed was defining hypotheses and tests, especially those ones the outcomes of which were insecure. The expert conducted multiple workshops where she was facing a reoccurring problem: the workshop participants were unwilling to define hypotheses and test them. They tried to avoid it and were more inclined to apply the new strategic options directly without preliminary testing and then see what would happen. However, frequently those projects cost lots of money, and it is irrational to implement them right away. Therefore, it was of significant advantage for those teams when the facilitator helped them define the hypotheses and test them while preventing teams from making fruitless investments. This type of help, defining uncertain hypotheses and exposing top management's insecurity, is uncommon for strategic planning facilitation workshops. The real-life example supporting this finding is presented below. The names of companies described in the case below and the following cases are coded with capital letters due to confidentiality of information. The confidentiality statement signed by the author could be found in Appendix 8.9, while the description of coded companies is presented in Appendix 8.8.

Box 1. Case-Example: Helping With Hypotheses and Tests Definition

Company A, whose primary business is the development of surgical instruments, came up with ideas for new strategic options: mobile sterilization and the rent of a set of surgical instruments. The concept of the first option is to come to sterilize instruments of the clients with the mobile equipment; the concept of second - to rent the pre-defined sets of equipment the company produces for surgeries.

During the workshop, the team and the facilitator started to define the hypothesis for the new strategic options. One issue the team faced was that some of these hypotheses either happened to be unrealistic or made no sense during the discussion process. For example, the team realized that they could not proceed with the hypothesis of “renting the equipment 24/7” and had to modify it by reconsidering their availability if they wanted to maintain a high quality of their service. Another example is the understanding of the team that no clinic will use sterilization services if it has its own sterilization department. Thus, thorough consideration of all the identified hypotheses was proven to be necessary, even though this process was very complex and complicated as each strategic element

(arenas, vehicles, differentiators, staging, and economic logic) for both strategic options had multiple hypotheses behind it.

The complexity of the process reveals the importance of having a facilitator who invests much time in the hypothesis definition process and makes team members think of what is necessary for a new strategic option and what has to be done. Moreover, the facilitator has an overview of the entire content hidden inside the hypotheses and is able to make the teams continuously consider every element of it.

Nevertheless, the definition of the hypotheses still does not allow the companies to proceed to the final strategic elements establishment as those hypotheses have to be proven first. But even before this stage, the hypotheses have to be prioritized and be as detailed as possible. For example, company A made the hypothesis of “being able to guarantee the availability of the needed equipment” much more relevant by considering how many employees they need in the particular section of the enterprise to offer the needed equipment. Alternatively, the hypothesis that the sterilization services would be attractive for clinics made more sense when the team added details that their potential client would avoid personnel and maintenance costs.

After that, the detailed hypotheses can be proven by available information, relevant experience, or testing. For instance, the hypothesis that the one-day ambulatories would be willing to pay extra for the new instruments could only be tested as the company developing the surgical instruments did not have the previous experience or the available information confirming its assumptions.

After defining the strategic options, company A defined and tested the strategic hypotheses, which in turn allowed identifying the strategic elements of the new idea. As a result, the company has established preliminary arenas (e.g., geographic area – Switzerland), vehicles (e.g., internal growth through establishing own sterilization department), differentiators (e.g., an image of an end-to-end solution provider), as well as staging and economic logic.

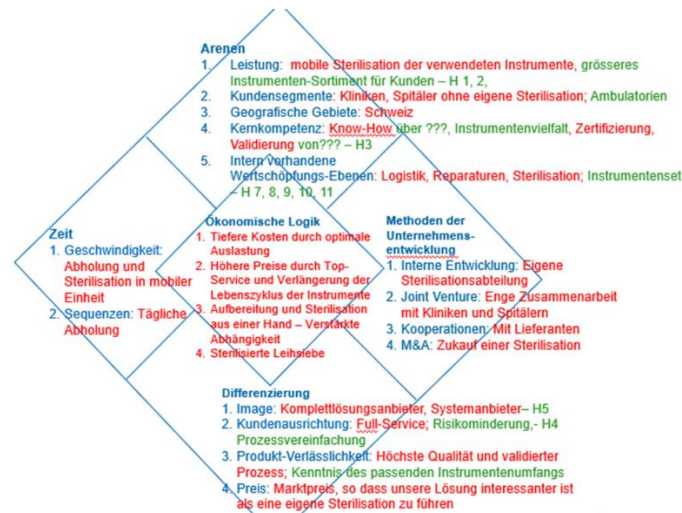


Figure 12. Company A's 5 Elements of Strategic Options (source: workshop materials)

To conclude, to identify the suitable hypotheses and test them, a facilitator cannot just gather all the team members and tell them to write down their thoughts and be done afterward. On the contrary, the whole process is complex; it requires a lot of thinking and patience, as well as deep discussions within the team. Such complexity scares, exhausts, and demotivates the top management teams. Therefore, having a facilitator prevents them from giving up and proceeding with false strategic options.

Empathy and authority: Facilitation schools teach future facilitators that it is expected from them not to manipulate or intervene in the group work process. The expert, however, does not think it is always correct and that sometimes a facilitator has to intervene to bring workshop participants back to essential points of a discussion. It is necessary for both strategic agility and strategic planning. Nevertheless, it is said that in agile settings, it is harder to find the balance between empathy and authority due to a lack of experience in the facilitation of strategic agility. For example, it is harder to assure a team that the processes will be easier at a particular point because the facilitator is not sure about it himself/herself yet.

Box 2. Case-Example: Group Work Process Intervention Importance

Company B, which is operating in the IT marketing industry, had the idea for a new strategic option – building an online platform for Swiss design products. The team gathered together for a facilitated workshop, where all the participants were thinking about the hypotheses for the strategic option and their testing.

As it was necessary for the strategic agility process, the facilitator asked the company representatives to write down how the strategic elements would be modified because of the new hypotheses and how these hypotheses had to be prioritized. However, the whole workshop turned out to be unsuccessful as most of the canvases for the given tasks were empty.


Annahme	Test	Auswertungs-kriterium
Hersteller (20 - 50) brauchen digitale Unterstützung und Kooperationen: <ul style="list-style-type: none"> • Ressourcen, • Technisches Know-How, • Prozess Know-How • sind sich der Bedeutung einer digitalen Swissness-Handelsplattform bewusst • Ersetze den middle man (durch online Handels-Plattform) löst das Wachstumsproblem der Design Hersteller 	1. <u>Suchwörter auf Google analysieren:</u> Plattform Swiss Design", "wie vermarkte ich international" 2. <u>Hersteller interviewen</u> über unabhängige Stelle (ZHAW Umfrage) 3. <u>Landings Pages</u> , incl. Google Adwords + Anmeldung für online Gehen der Plattform 4. <u>Crowd funding</u> für Plattform 5. <u>Hersteller interviewen</u> über unabhängige Stelle (ZHAW Umfrage) mit visualisierter Value Proposition: <u>Prototype</u> mit 5 Merkmalen 6.	
Einrichtungskunden akzeptieren die Marke als CH Premium Brand: <ul style="list-style-type: none"> • suchen exklusive Design Angebote, • suchen Reputation/ Status • sind Design affin und suchen Ästhetik / Minimalismus • haben einen Bezug zur Schweiz • Einrichtungskunden sind vor allem Frauen zwischen 24 - 35 Jahren 	<ul style="list-style-type: none"> • <u>Smoke Tests</u> mit Instagram, TikTok (incl. Influencer) Fake Shop mit Vorreservierung • <u>verschiedene Shops</u> mit diversen Design-Auftritten • <u>mit Branchen</u> (Uhren, Tourismus...) zusammen Swiss-Premium Attribute herausarbeiten (Befragung) • <u>Objekt Kontoren</u> (als Professionelle Wiederverkäufer) in Deutschland mit Plattform-idee ansprechen 	<ul style="list-style-type: none"> • Demografische Eigenschaften • Traffic auf diversen Design Seiten => Design Eigenheiten, die gesucht werden
Plattform ist geeignet, um Zwischenhändler auszuschalten	welche Anbieter haben hohes Volumen	
B2B Kunden können interessiert sein mit zusätzlichen Service Angeboten	<ul style="list-style-type: none"> • <u>Objekt Kontoren</u> (als Professionelle Wiederverkäufer) in Deutschland mit Plattform-idee ansprechen 	

Figure 13. Company B's Canvas (source: workshop materials)

The founder of company B was among the workshop participants. However, it was difficult for the facilitator to make him think strategically and consider the complexity of the hypotheses. For example, it was of utmost importance to identify the users of the suggested platform. The CEO needed to decide if his target audience was the young swiss community or, for example, a wealthy segment of the other part of the world as it made a difference for the new strategic option. Identifying aspects like this helps companies avoid discovering critical mistakes after already having invested significant amounts of money.

Nevertheless, the CEO of company B was not involved in the strategic thinking process until the end of the workshop. The intention of a facilitator to intervene in the team's

collaboration process and motivate the founder to consider the details for the new strategic option did not work out. Nevertheless, this intervention was still vital as it served as a starting point for the redirection of the workshop participants' thinking from a superficial level to a much deeper hypotheses consideration.

Being fair and honest with everyone: As a person gains more experience in the facilitation, it becomes easier for him/her to see teams' dynamics and identify their members' personalities. However, due to the novelty of the strategic agility notion, a facilitator has to concentrate more on a process than on people when something is not clear. Nevertheless, such quality is essential to both strategic planning and strategic agility facilitators, even though it gets a little bit harder for the latter ones.

Being self-disciplined, logical, and consistent: It is easy to possess such qualities when a facilitator is familiar with the strategy-making process. For example, in a strategic planning workshop, all the steps and most of the possible challenges are known in advance and could be tackled easily. For strategic agility workshops, however, it is much more difficult as a facilitator faces many situations he/she does not have any prior experience with. Therefore, he/she struggles with being logical and consistent.

4.2.2 *Competencies*

From the six competencies of a strategic planning facilitator, four could be applied to the facilitator of strategic agility as well. These are 1)“creating such a setting where everyone feels encouraged to express his or her thoughts and ideas” (short: creating a right setting), 2)“understanding the organizational issues of the clients fully” (short: understanding issues of the clients), 3)“having experience in conducting strategic planning (here: agility) workshops” (short: having experience in conducting workshops), and 4)“being able to apply theoretical concepts.”

Creating a right setting: No comment was made on this competency, but the expert confirmed it is of the same importance in strategic agility facilitation.

Understanding issues of the clients: The expert said it was important for both strategic planning and strategic agility. However, she also added that it was doubtful if any facilitator could accomplish it in all respects as it was impossible to understand all the organizational issues of companies completely.

Having experience in conducting workshops: The expert said it was as helpful for strategic agility as for strategic planning. She also added that it was a struggle not to be experienced in strategic agility workshop assistance because it made facilitators be stuck in challenging situations, and it was difficult for them to find any relevant solutions.

Being able to apply theoretical concepts: Theoretical concepts are also crucial for strategic agility facilitators. Agile theory and other topics, which are not necessarily connected with the concept of agile, are helpful for conducting workshops.

The expert also added that in strategic planning facilitation, there are three dimensions that a professional has to be aware of: the process, the team, and the topic. These dimensions are also present in strategic agility but in a different combination or with different components. For example, in strategic agility, the content dimension consists of tests definition, testing, and indicators. The team dimension concerns the issue of exposing oneself to insecure hypotheses. The process dimension is about iterating instead of collecting information and making a final decision based on it (as it is in strategic planning). To understand, structure, and leverage these new components, a facilitator has to know additional theories to have a better experience while conducting strategic agility workshops.

Box 3. Case-Example: Necessity of Knowing Additional Theory

During a workshop with one of the companies (either the media architectures studio (company C) or the IT marketing company (company B)), the facilitator and team members were trying to define hypotheses for a strategic option. However, at some point, the facilitator realized that everyone was stuck and could not move forward. Moreover, the usual outline of the workshop she always used did not work in this particular case. Thus, the facilitator had to quickly find an alternative solution for the problem the team faced. Finally, she decided to use the theory which was not connected with strategic agility (“Theory U” by Otto Scharmer (2009), but as she worked with the theory before, the facilitator knew how to apply it.

Such a case where a facilitator is not used to some situations could also appear in the strategic planning. However, what is unique for strategic agility, is that there is not only the factor that something is unusual but also the fact that there are no hints outside that could tell a facilitator how to cope with a new challenge; there is no “obvious” literature

or theory. Therefore, a facilitator has to look for additional theories from other sectors that might be applied to strategic agility challenges.

One competency – “being able to make the group understand and accept everything given or communicated by the facilitator” has some different features for strategic agility facilitation. Being a leader of the process and have authority is important for facilitators in both settings. Nevertheless, to mention once more, the novelty of strategic planning creates hurdles for the facilitator and sometimes makes him/her feel doubtful about what is being initiated by him/her. Therefore, it is more challenging to make the group understand and accept things communicated by a facilitator when the facilitator himself/herself is unsure if it is correct.

Box 4. Case-Example: Difficulties With Convincing a Group

A facilitator has conducted a workshop with the top management team of company C, media architectures studio, to work on the new strategic option – building a robot for museums.

The facilitator wanted workshop participants to think about the personas interested in the new offering to understand what expectations people would have from the robot. Thus, the facilitator organized a simulation lasting for about seven minutes where she pretended to be a robot showing the personas (museum director and museum visitors) the museum and being guided by them.

After all, the simulation did not turn out to be successful. The purpose of it was to derive the indicators that could give more information about the robot user (e.g., his/her particular interests). For example, the top management team hypothesized that the museum visitors would be more willing to use the robot from home. However, while simulating, they could not think of any indicators they could show to follow this hypothesis. They did not know how to indicate that they, as personas, for instance, did not like to be in contact with people frequently. In the end, the expected outcomes of the simulation, like finding what could be measured, what could be seen, what could be considered at the later stage of testing, did not take place, and the workshop participants were stressed out.

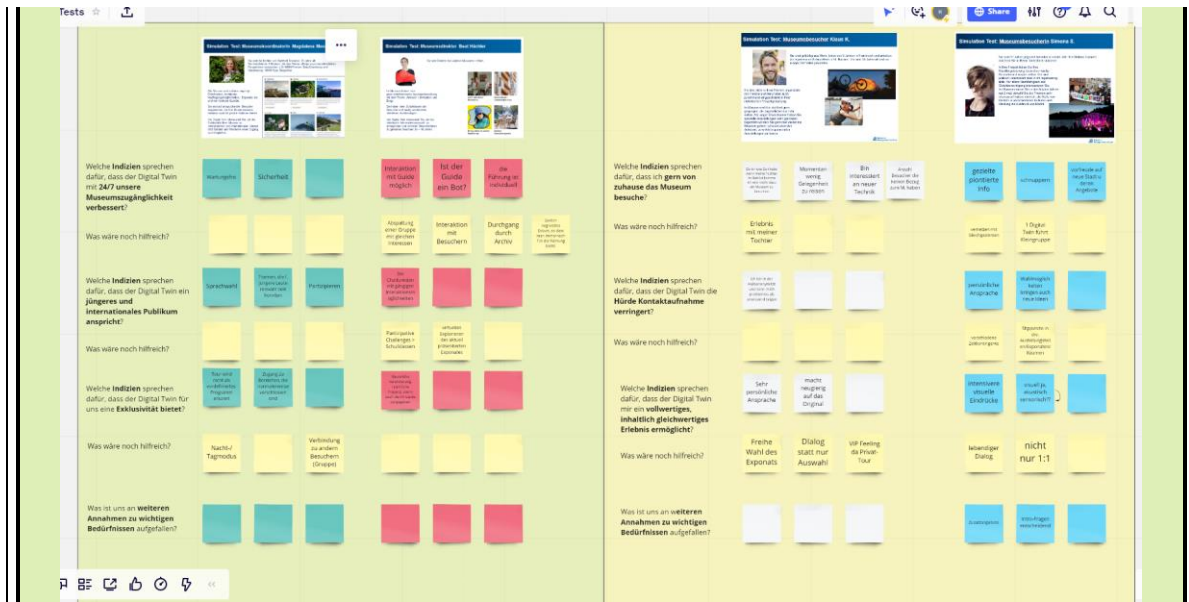


Figure 14. Workshop with the Company C (source: workshop materials)

Therefore, the facilitator did not insist on the simulation continuation and decided to skip this step completely. Instead, she suggested thinking about the details of the existing hypotheses and the ways they could be tested. She realized that her initial idea was too complicated and, in fact, was not really important for the workshop, at least at the stage where they were.

In conclusion, the simulation process was by any means helpful and served as a good warm-up to get deeper into the topic of the new strategic option. Nevertheless, finding the persona indicators was too complicated, and the facilitator understood that she needed to do it differently. Since she was not experienced enough in strategic agility, she could not say yet what would work in these new settings and what would not.

One competency – “helping those responsible for strategy-making to understand the importance of collective decision-making” - is not applicable for the comparison. The facilitation expert said that depending on a company, top management realizes or does not realize the importance of collective decision-making. Some companies are used to that, and some are not. Therefore, it is incorrect to generalize this competency and apply it to all situations.

4.2.3 Functions

Out of ten functions of the strategic planning facilitator, four are also applicable to strategic agility facilitation. These are 1)“stimulating thinking of the group members,”

2)“asking questions and summarizing the data,” 3)“enabling the group to stop having circular discussions,” and 4)“spotting and handling conflicts within the group.” No comments were made on these functions apart from confirmation that they applied to both settings.

Nevertheless, the author asked the expert how she was usually dealing with conflicts. The answer is that the expert usually relies on her intuition. She tries to see a good side of what is being said by a problematic workshop participant. Then, she paraphrases it in a way that the good content becomes clear to the rest of the participants, so they see the problematic person as a source of knowledge. Additionally, the expert might stop the conversation and make the conflicting person understand that his/her point is understood, and there is no need to continue expressing it. Furthermore, when two people are having conflict, the expert intervenes in their dialogue and tries to make them speak to her rather than to each other so then she could explain their thoughts to them individually in a diplomatic way. Overall, she does not have one way of managing the conflict; it always depends on the situation. However, what the expert always does is she tries to see the valuable part of the conflict and bring it to the surface.

Four other functions: 1)“guiding the group members through the course of steps defined in advance to achieve the result which is created collectively and accepted by everybody” (short: guiding the group), 2)“motivating the group members (and convincing the reluctant ones) to take part in the strategic planning discussions and keep them enthusiastic” (short: motivating the group), 3)“recognizing the tendency of the group members to be unrealistic (too optimistic or too pessimistic) about the future and preventing them from this tendency by challenging their assumptions and expectations” (short: recognizing the tendency), and 4)“ensuring that a group came to a consensus rather than a compromise” (short: ensuring consensus) - had some differences for the strategic agility facilitator.

Guiding the group: This function is even more critical for the strategic agility facilitator in the expert's opinion. Since many companies are experienced in strategic planning already, team members know what to expect from it. In strategic agility, contrarily, nobody is that experienced. Therefore, teams rely on facilitators more and follow everything facilitators say as they are too insecure about being independent.

Box 5. Case-Example: Reliance of Teams on Facilitators

When the expert worked with company D (which specializes in software solutions) and company E (which operates in the insurance sector) on their new strategic options, she was helping to define the hypotheses and canvases for them.

The facilitator started to do it together with teams, and then the teams continued to do it independently. Afterward, the teams met with the facilitator to discuss their experiences. It was found that teams struggled to fit their hypotheses into the canvases as they were too large.

Even though they could modify the canvases to their needs or even use a different tool that would be more suitable for them, they did not dare to do so as the canvas was the tool given by the facilitator, which meant to teams that they could not change anything there. This example proves the insecurity and inexperience of teams working with strategic agility and their total reliance on the expert of the topic, which makes them inflexible.

During a research workshop with the project partners in April 2020 strategic hypothesis were defined for each company with the help of facilitators. In the review one statement was: difficult to keep the whole strategic picture / direction in mind, while defining detailed hypothesis & tests

Fragen	Antworten
1. Was war schwierig beim Ausarbeiten des Canvas, weshalb?	<ul style="list-style-type: none"> Theo: Gesamtbild trotz Fokussierung beibehalten Einstieg in die Thesenformulierung war am anspruchsvollsten
2. Was war leicht und warum?	<ul style="list-style-type: none"> Theo: Generell die Formulierungen finden, weil viel Vorwissen vorhanden ist Willem: Vorwissen ist nicht zu unterschätzen
3. Was fehlt, um das Bild abrunden zu können?	<ul style="list-style-type: none"> Willem: generische Struktur, Anhaltspunkte für die Annahmen-Formulierungen
4. Weitere: ...	<ul style="list-style-type: none"> Theo: konkreter Nutzen durch weitere Schärfung durch dieses Gespräch stattgefunden

Figure 15. Breakout Session Notes (source: workshop materials)

Motivating the group: For the strategic agility facilitator, it is more important to motivate the group members to change their values and paradigms rather than to take part in discussions. Teams need to understand that when their hypotheses do not prove to be good, they are still a valuable source of information and should not be taken as something embarrassing. It is always beneficial to have new findings, even if they contradict one's expectations.

Box 6. Case-Example: Shifting Team Members' Mindset

Company C (media architectures studio), which came up with the strategic option of building a robot for museums, had already arranged tests with a museum of communications in Bern. Nevertheless, when the facilitator asked them about the testing ideas, what exactly they wanted to test, and how the testing would help them, they had none. Company C only wanted to put the robot in the museum and see what would happen.

Therefore, the facilitator needed to guide them and convince the team to think about particular indicators which could be tested. For example, they could identify the number of museum visitors interacting with the robot. Alternatively, the number of people who reject interacting with the robot could be checked.

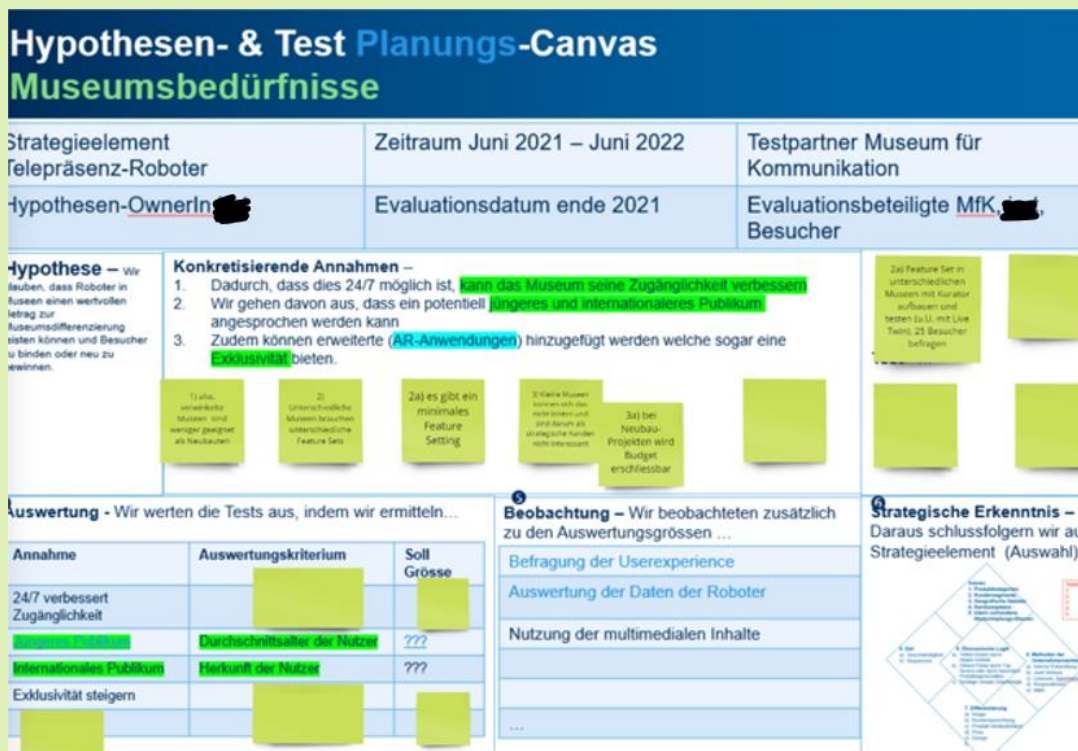


Figure 16. Company C's Canvas (source: workshop materials)

The importance of identifying the indicators lies in the further ability of the company to analyze the outcomes of the testing. However, the team was only focused on the technical testing of their product and was not used to strategic testing. In fact, they were afraid that their strategic testing would go wrong and the new strategic option would lose its value. Yet, it is also critical to know if the idea does not make sense. In this particular case, building such a robot costs around 1 million Swiss francs. Therefore, having a minimum

viable product (MVP) before assembling the final product and having tests with the MVP has enormous importance and value. It does not cost as much as the actual product and helps quickly identify if it is not worthy to proceed with the suggested strategic option.

The expert was also asked a follow-up question regarding the top management's attitude to agile decision-making. It was revealed that in teams pursuing strategic agility, CEOs are not always enthusiastic about the agile methods as they have different expectations from them (they expect them to be faster and less disciplined). CEOs often like to rely on their intuition and try their ideas out without building hypotheses and testing them. What was also derived from the experience of the expert is that frequently, in top management teams, there is one person who wants to move forward as quickly as possible and the other person who likes to analyze and reflect before going further. Both roles are given in the teams, and the more intensely one type tries to go his/her own way, the more opposition is provided by the second type, so the balance is maintained. The reflective and analyzing type of people is often more enthusiastic about strategic agility than the other, fast-moving type, even though a vice versa situation is usually expected.

Recognizing the tendency: For a strategic agility facilitator, this function has a deeper meaning. It is needed not just to inform team members if they are too optimistic or pessimistic about their ideas, but also to make them aware of what they know, what they do not know, and what they need to know for their hypotheses to work (e.g., to make them define indicators to test the hypotheses).

The author of the thesis then had a follow-up question if it is important to make evidence-based decisions in strategic agility. The expert answered positively and added that acting evidence-based is more critical in strategic agility than in strategic planning. Teams pursue the agile way of strategy-making when they want to find out valid data by iterating. On the contrary, in strategic planning, teams have the information basis available through the known set up of analysis (e.g., SWOT), and this lets them go further to make a decision, whereas in strategic agility, this basis is often not credible and does not allow to proceed.

Box 7. Case-Example: Making Teams Aware of the Importance of Detailed Information

Company A (the one developing surgical instruments) came up with the strategic option to open a daughter company in Spain with the goal to transfer all the standardized tasks from the headquarters (Switzerland) to the new division. Thus, in the opinion of the top management, employees in Switzerland would have more time and could focus better on the development of new products and customers.

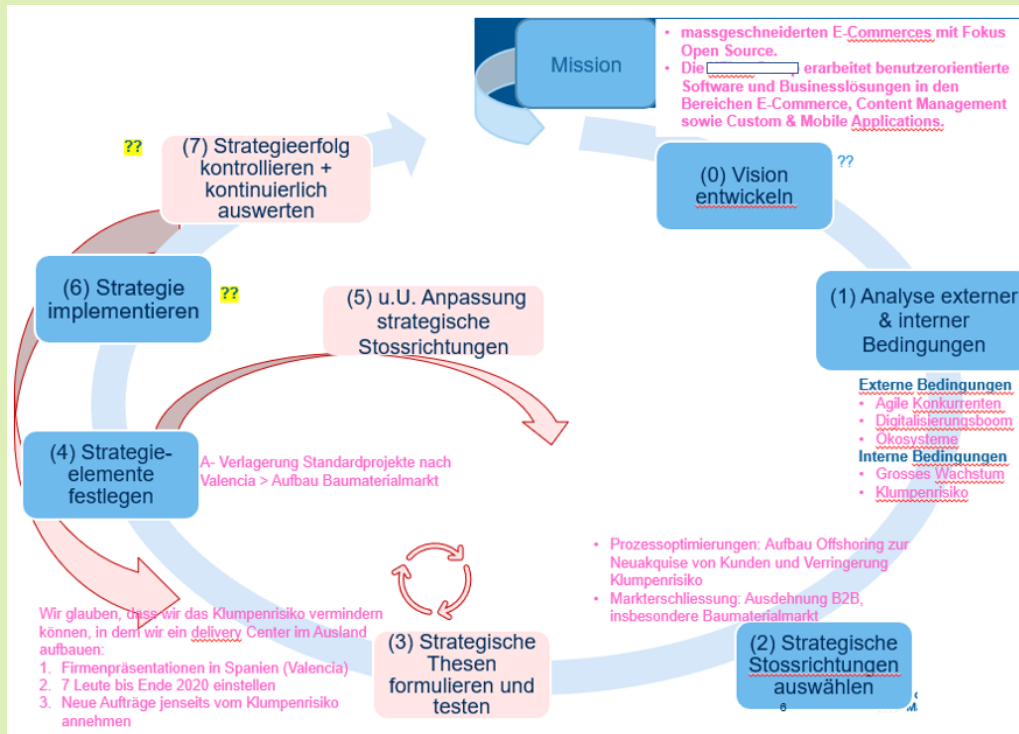


Figure 17. Company A's Strategic Agility Process Scheme (source: workshop materials)

The facilitator noticed that the top management was very optimistic about this new project. However, she had doubts about its reasoning and necessity. She did not see enough evidence-based decisions being made. Therefore, the facilitator started asking the leaders questions about their hypotheses regarding the strategic option and the details behind them. For example, she wanted to know what the company wanted to achieve with a new division in a new country. Moreover, she was interested in what way the team in Switzerland would be relieved from extra tasks or how the top management imagined the process of transferring the tasks from one team to another.

This way, she made the leaders think more thoroughly about their idea. As a result, they came up with thought-through hypotheses and assumptions that were significant for the new project to succeed. The crucial details elaborated in their hypotheses would not appear if the facilitator did not make the team analyze their decisions. Finally, the top management team also saw significance in the actions initiated by the facilitator. In the

beginning, they thought that just finding people would be enough for the project to work out.

Ensuring consensus: Coming to a consensus is less critical in strategic agility settings. The expert hypothesized that the reason for that was having iterations. It is enough for the team members to have a compromise and just test it. If the test failed, the team could move to another idea. Agile teams make micro-steps and consider little details before making a long-term decision.

Box 8. Case-Example: Importance of Compromise

When having discussions about the strategic options during workshops with company A, the facilitator noticed that the team members did not need to defend their opinions and try to convince everyone that they were right. Instead, the team accepted each detailed hypothesis and let it be tested to see the results, which helped to avoid conflicts.

<p>Ausgehend von den zwei Punkte: wichtigste Annahmen</p> <ol style="list-style-type: none"> 1. Individuelle Instrumentenbedürfnisse können aus Portfolio befriedigt werden 2. Der Kunde erhält ein jederzeit top aufbereitetes Instrumentarium (Risikominderung) <p>1. Hypothese Der Kunde/Ambulatorium wünscht sich ein grösseres/breiteres Sortiment an Instrumenten</p> <p>2. Hypothese Dem Ambulatorium fehlen für die Eingriffe regelmässig entscheidende Instrumente (Annahme zu 1) Sterilisation intern aufzubauen oder extern zu vergeben ist für Ambulatorien unattraktiver, als sie bei einzukaufen. Die Kombination von umfangreichem Sortiment & Sterilisation & Leihgabe pro Einsatz ist für die Ambulatorien interessant.</p> <p>3. Hypothese und die Ambulatorien kennen den Umfang der Instrumente, welche sichergestellt sein müssen: was braucht das Ambulatorium (Zusammensetzung, Häufigkeit, Qualität der Siebe)</p> <p>4. Hypothese Das Risiko einer Fehlanwendung wird durch top aufbereitetes Instrumentarium nachweislich reduziert Das Risiko einer Fehlanwendung wird durch ideal abgestimmtes Instrumentarium nachweislich reduziert. Den Ambulatorien ist der Quasi-Neuzustand des Instrumentariums wichtig genug, um einen Aufpreis von xy zu zahlen.</p> <p>5. Hypothese ist der ideale Servicepartner durch die zur Verfügungstellung der jeweiligen Siebe und Instrumente. ist Verfügbarkeit (Tägliche Siebbereitstellung) und Neuzustands-Qualität der Instrumente besonders interessant für die Ambulatorien.</p> <p>6. Hypothese Top aufbereitetes Instrumentarium ist für das Ambulatorium von entscheidender Bedeutung (siehe 4)</p> <p>7. Hypothese ist der Lage den Ambulatorien jederzeit 2x/ Woche die notwendigen Instrumente in besten Qualität zur Verfügung zu stellen (was ist der Prozess-Engpass?)</p> <p>8. Hypothese Die Rückverfolgung ist dank dem KENUS-Matrix auch für Miet-Siebe lückenlos gewährleistet (bekannt oder notwendig zu testen?)</p> <p>9. Hypothese Auch bei Personalausfällen ist die in der Lage jederzeit das benötigte Instrumentarium bereitzustellen. Die Auslastung führt nie zu einem Engpass an Instrumenten/Sieben Um eine Liefersicherheit von 99% zu garantieren, brauchen wir x Personen im Bereich y.</p> <p>10. Hypothese Die Kostenstrukturen der lassen eine preisgünstige Lösung zu Die Bereitstellung eines sterilisierten Leihinstruments kostet die im Schnitt nicht mehr als xy CHF.</p>	<ol style="list-style-type: none"> 1. Überarbeitung Hypothesen 2. Auswahl der wichtigsten; wenn Verbrauchskosten nicht über Krankenkasse abzuwickeln sind, müssten Hypothesen für Spitäler umformuliert werden. 3. Konkretisierung Annahmen 4. Definition Tests
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Figure 18. Company A's Strategic Hypotheses (source: workshop materials)

Before working this way, the team, especially the project manager, had difficulties with the company's CEO, who was pushy and fast-moving. Each time he had a new idea, he wanted to implement it immediately. Since he was charismatic and had a strong personality, it was not a problem for him to convince other people that his ideas were good. However, it was difficult for the team members to persuade him that his idea might not bring positive results.

By introducing tests, however, and prioritizing compromise over consensus, the team had the opportunity to test every hypothesis of the CEO and avoid investing money in all of his initiatives which were not proven to be successful.

Two functions – 1)“analyzing the collected information and presenting it to others with clarifications” (short: analyzing and presenting information) and 2)“smoothly managing the resistance to changes” - are not applicable for the comparison.

Analyzing and presenting information: In strategic planning, a facilitator has this function when it is expert consulting, not process consulting. In strategic agility, however, a facilitator does not have this function at all. According to the expert, this function is a crucial yet fragile step in strategy-making performed by the testing team. It is essential that testing teams present the information to decision-makers because they (testing teams) are the ones who are aware of the depth and important details of the information and its strategic impact on the company.

It was also added that strategic agility teams have three main roles: testing team, hypothesis owner, and the decision-makers. The information has to be presented in a structured way by the testing team to the hypothesis owner and then by the hypothesis owner to the decision-makers. As an alternative, they can discuss the information all together.

Box 9. Case-Example: Importance of Information Possession by the Testing Team

An insurance company E had a new strategic option – the mobility service. The company already discussed it and interacted with potential clients. One of those clients was a railway company that, in the end, was not interested in the service itself but recognized that the insurance company had vital experience with building business ecosystems. They said that this experience would be essential for them as they were interested in business ecosystems.

Even though the testing team did not have an opportunity to present this testing outcome to top management as it was additional information for which there was no slot in the meeting, this information still would have a significant strategic impact on company E. The testing team (as a primary receiver) was the only carrier of the information that fully understood its content and importance.

Smoothly managing the resistance to changes: The expert assumed that this function would be relevant in the strategic agility setting. She also suggested that since teams had time to think about changes during continuous iterations, it would be easier for them to accept these changes as they appeared little by little. Nevertheless, these are only her hypotheses, and the expert is not yet sure about them. Therefore, the author of this paper classified this function as not applicable for comparison for the time being.

5 Discussion

This chapter presents the interpretation and discussion of the information derived from the previous chapter. It also provides the author with the foundation for answering the research questions of this thesis.

5.1 Leader's Traits Identification

The initial idea of the author of this paper was to identify three categories of leadership traits: unique for strategic planning, unique for strategic agility, and shared between strategic planning and strategic agility. After finding the unique strategic agility leadership traits, the author wanted to base her further primary research on them. It was assumed that knowing those unique traits would help identify what functions, competencies, and qualities a facilitator has to have to enable a leader to possess the necessary traits for strategic agility.

It was also decided to take shared leadership traits between strategic planning and strategic agility as a basis for one of the interviews with the expert. It was considered by the author that the fact of the existence of the shared leadership traits made it possible that some of the characteristics of a strategic planning facilitator might be transferred to a facilitator of strategic agility as well.

However, it was discovered that only two traits were unique for leaders of strategically agile organizations. Therefore, the author made a decision not to proceed with her initial assumption as it no longer made sense for her. With this discovery in mind, the author found that leadership traits did not play a significant role in establishing facilitators' characteristics, at least according to this research.

However, the author still conducted an interview with the expert based on the characteristics of a strategic planning facilitator, with the intention to explore which functions, competencies, and qualities could also be applied to strategic agility facilitators. As a result of the interview, the author not only found the similarities but was also given detailed information about the differences between strategic planning and strategic agility facilitation. Furthermore, the information was supported by real-life cases from strategy-making workshops.

5.2 Facilitators' Functions, Competencies, and Qualities

After analyzing the findings of the mini-workshops conducted with the expert, the author summarized them in the table below (Table 6). The first column of the table displays how many characteristics were taken as a basis from strategic planning facilitator, column 2 shows how many of them are identical for the strategic agility facilitator, column 3 shows how many of them have particular distinctions in strategic agility settings, and the last column shows the number of characteristics which are not applicable for the comparison.

	Number	Identical	Distinct	Not Applicable
Qualities	6	2	4	X
Competencies	6	4	1	1
Functions	10	4	4	2
Total	22	10	9	3

Table 6. *Quantitative comparison of the facilitators' characteristics*

As ten characteristics happened to be completely identical, the author would transfer them to the qualities, competencies, and functions of strategic agility facilitators without any changes. However, in the author's opinion, one competency – “being able to apply theoretical concepts” – had a distinction. This distinction derived not from the interview with the expert but from the case-example provided by her. The author of this paper recognized that there is a critical nuance in a strategic agility setting that needs to be considered. The facilitator must pay attention to theoretical concepts that are not deemed obvious for applying them in strategic agility workshops. The facilitator, himself/herself, has to find something valuable in them to apply in his/her practices of strategic agility.

Out of nine distinct characteristics, four (“Being both empathetic and authoritative”, “Being fair and honest with everyone”, “Being self-disciplined, logical, and consistent”, and “Understanding the organizational issues of the client fully”) had only a different degree of difficulty to be pursued. That means that for a strategic agility facilitator, it is more complicated to acquire those characteristics. It is deducted by the author that the primary issue causing those difficulties is a lack of experience in strategic agility settings. The author also sees that the lack of experience of the facilitator is caused by the novelty of the strategic agility concept itself and the absence of extensive research helping facilitators better manage the challenges associated with conducting workshops in a new manner.

Nevertheless, these four characteristics could still be transferred to a new (strategic agility) setting. However, a facilitator should pay better attention to them and master these characteristics, so the associated challenges do not hinder the progress of the workshops.

One characteristic (“Guiding the group”) is only different in the way that it has greater importance in strategic agility than in strategic planning. It could also be transferred to a new setting and should be considered more thoroughly by a facilitator.

The other four characteristics have more detailed distinctions than the ones previously mentioned. One of them is clearly contradicting the function taken from strategic planning as a basis. While in strategic planning, the consensus is prioritized over compromise, in strategic agility, coming to a compromise is essentially enough as all the preliminary decisions are subject to be tested in any case (as hypothesized by the expert and believed by the author). The other distinct function does not concern the participation of team members in the discussions (as it is in strategic planning) but cares more about shifting their values and paradigms. Two other distinct characteristics (“Willingness to help others” and “Recognizing the tendency of the group to be unrealistic”) only have additions to the basis taken from the strategic planning but do not contradict them.

The complete list of characteristics needed for a strategic agility facilitator, derived from the analysis of findings, is presented in Table 7. Characteristics written in black color are taken without changes from the characteristics of strategic planning facilitators (**this is the answer to the research sub-question 1.1 (RSQ 1.1) of this paper**). Text written in green color is a modification for the strategic agility facilitator added by the author based on the results of the analysis. Crossed text in red color is believed to be not applicable to the strategic agility facilitator, once again, based on the analysis of findings.

	Characteristics	Comment
Qualities	Willing Ability to help others to define hypotheses and tests	The author would refer it to competencies rather than to qualities
	Following the interests of the clients while putting own interests and ego aside	
	Having excellent communication skills	
	Being both empathetic and authoritative	More difficult to achieve
	Being fair and honest with everyone	More difficult to achieve
	Being self-disciplined, logical, and consistent	More difficult to achieve
Com peten cies	Helping those responsible for strategy making to understand the importance of collective decision-making	Not applicable

	Creating such a setting where everyone feels encouraged to express his or her thoughts and ideas	
	Being able to make the group understand and accept everything that is given or communicated by the facilitator	
	Understanding the organizational issues of the client fully	More difficult to achieve
	Having experience in conducting strategic planning (agility) workshops	
	Being able to apply “inconspicuous” theoretical concepts, which are not supposed to be applied to strategic agility	Modification derived not from the interview with the expert but from the provided case-example (Box 3)
Functions	Guiding the group members through the course of steps defined in advance to achieve the result which is created collectively and accepted by everybody	More critical
	Motivating the group members (and convince the reluctant ones) to take part in the strategic planning discussions and keep them enthusiastic to change their values and paradigms, shift mindset	
	Stimulating the thinking of the group members	
	Recognizing the tendency of the group members to be unrealistic (too optimistic or too pessimistic) about the future and prevent them from this tendency by challenging their assumptions and expectations and by making them aware of what they know, what they do not know, and what they need to know	
	Ensuring that a group came to a consensus rather than a compromise to a compromise in hypotheses and tested them	
	Asking questions and summarize the data	
	Analyzing the collected information and present it to others with clarifications	Not applicable
	Enabling the group to stop having circular discussions	
	Smoothly managing the resistance to changes associated with strategic planning	Not applicable – but it is only a hypothesis of the expert
	Spotting and handling conflicts within the group	

Table 7. List of Characteristics Needed for Strategic Agility Facilitator

The table shows the evidence that emerging characteristics only concern the competencies (partially) and functions (partially) of the strategic agility facilitators. The qualities are staying the same as in strategic planning settings.

5.3 Relation to the Literature

Although it is rather difficult to link the results of the data analysis to the literature review due to the absence of scientific works on the topic of strategic agility facilitation, some findings of this thesis are nevertheless related to the studied literature. Relation to the works of Pichel and Müller (2018; 2021) is not taken into account in this section due to the contribution of one of the researchers to this study by providing the author with the primary data and practical experience in the facilitation.

First, the analysis of primary data confirmed the statement of Varyani & Mehdi (2010) that facilitation is part of the strategy as practice approach. Indeed, a facilitator is an external actor who has an influence on the company's strategy-making process. Thus, a facilitator is a strategy practitioner himself/herself. Moreover, a facilitator has a set of praxis (e.g., workshops, or hypotheses definition) and supporting practices (e.g., canvases), all of which allow the facilitator to do interactive strategizing (Hendry et al., 2010; Jarzabkowski, 2005; Jarzabkowski et al., 2007).

Second, the author identified that for the facilitation of strategic agility workshops, the facilitator needs to be a process consultant, and, as it was written by Troxel (2005) and Kubr & International Labour Office (2002), empower teams to come to solutions themselves by giving and explaining them necessary tools, structures, and processes rather than simply telling them what to do.

Also, the opinion of the facilitation expert is aligned with the one of Schwarz (2002) that even though a classic definition of facilitator forbids him/her to intervene in the group discussion process, sometimes it is necessary to intervene to make group members be focused on the critical discussion points. It is also revealed that in strategic agility, the facilitator plays the roles of at least a coach, a trainer, and a mediator (Schwarz, 2017).

Furthermore, it is found that in strategic agility, conflict management skills are also important for a facilitator (this skill was mentioned by Vennix (1996) but not in a strategic agility context). The expert validated that a facilitator can leverage the diversity of opinions of team members and present seemingly wrong inputs in a positive light and direct the problematic discussions into the right course.

Moreover, the findings show that a facilitator helps top management teams embed at least part of the habitual activities of strategic agility identified by Gurkov et al. (2017) into their strategy-making process. Specifically, the facilitator makes teams employ "perceiving" by establishing a role of a hypothesis owner and enabling the person with

this role to create ideas by observing the environment and communicate them to testing teams and decision-makers. Moreover, the rest of the team is also encouraged to observe the environment and try to understand how its components match their ideas, what supports them, and what information still needs to be obtained. The facilitator also empowers the teams to apply “testing” activity. He/she communicates the importance of testing and experimenting as it allows to create an MVP and check if it functions without wasting time and money, as well as to gather valuable information necessary for the further steps. The latter also supports the remark of Di Minin et al. (2014) regarding the ability of strategically agile teams to test ideas cost-effectively.

Additionally, in line with the opinion of Vrontis et al. (2012) that strategic agility grants organizations with a mindset that is aligned with the dynamic environment, the facilitator clarifies for teams why it is essential to appreciate failed hypotheses. In a stable environment, it is relatively easy to forecast if strategic ideas will be successful or not. In the VUCA world, on the contrary, one can never be entirely sure if a new strategic option will work out. Therefore, top management needs to understand that in the world of constant changes, there is no need to be afraid of being wrong and exposing oneself to insecure hypotheses and tests. Any information is valuable for strategically agile teams and makes a contribution to the progress of their activities.

The findings of this study also match with what was written by Zhou & He (2018). The expert confirmed that setting performance indicators and defining objectives is crucial for strategic agility. Without these activities, no hypothesis testing will bring value as there will be no basis for a robust analysis of tests outcomes.

It is not yet clear whether the findings support the statement of Santala (2009) that the same group of people has to work on strategic agility planning and implementation because it is discovered by the author that the facilitator defines three roles in the teams: hypothesis owner, testing group, and decision-makers. It is not evident that all of them participate in all stages of strategy-making. Nevertheless, they are in constant contact with each other and communicate the necessary information.

6 Conclusion

This thesis was set out to understand what is required from a modern strategy facilitator to be able to help organizations willing to meet the demands of the VUCA world pursue strategic agility. The purpose was to build initial knowledge for facilitation professionals and provide them with information about the essential qualities, competencies, and functions they need to possess.

First, the author conducted the literature review, based on which she made an assumption that emerging characteristics of the strategic agility facilitation could be derived from the leadership traits needed for top management of organization willing to pursue strategic agility. Moreover, the literature review provided the author with information regarding the qualities, competencies, and functions of a strategic planning facilitator, which then served as a basis for the workshops with the expert facilitator.

Even though the secondary data analysis allowed the author to identify unique leadership traits of strategic agility, the interview with the expert proved the initial findings wrong. The primary data analysis showed that there are only two unique traits that leaders of strategically agile organizations have. Therefore, the assumption that the strategic facilitation characteristics might be based on those unique traits was rejected. Thus, the **answer for the RQ 2** - “Could the traits required from leaders of organizations pursuing strategic agility influence the development of characteristics needed for a facilitator of strategic agility?” – is “No”. **The answer for the research sub-question 2.1 (RSQ 2.1)** – “What are the similarities between leaders’ traits needed for strategic planning and strategic agility, and what are the unique traits?” could be found **in section 4.1.3** of this paper.

Nevertheless, the author still could identify the characteristics of strategic agility facilitators through the series of mini-workshops with the expert. The qualities, competencies, and functions of the strategic planning facilitator were taken as a basis for the discussion, and comments regarding the differences and similarities in the case of strategic agility were made by the expert. Moreover, the available workshop materials with several companies and Master’s theses also added value to the author’s investigation.

The analysis of the primary data allowed the author to **answer the RSQ 1.1** – “What characteristics could be transferred from strategic planning facilitation to strategic agility

facilitation?”- **(the answer could be found in section 5.2) and the RQ 1 – “What are the emerging characteristics a strategy facilitator needs to acquire in order to help enterprises pursue strategic agility?”. The emerging characteristics are the following.**

1. Ability to help others to define hypotheses and tests (competency)
2. Being able to apply “inconspicuous” theoretical concepts, which are not supposed to be applied to strategic agility (competency)
3. Motivating the group members (and convince the reluctant ones) to change their values and paradigms, shift mindset (function)
4. Recognizing the tendency of the group members to be unrealistic (too optimistic or too pessimistic) about the future and prevent them from this tendency by challenging their assumptions and expectations and by making them aware of what they know, what they do not know, and what they need to know (function)
5. Ensuring that a group came to a compromise in hypotheses and tested them (function)

6.1 Limitations and Further Research

Given the complexity of the research topic, the author has identified the main limitation of this study. Even though the topic of strategy-making is vastly researched, there is limited literature about strategic agility, especially considered as a process and not as content, available. Regarding the literature about the facilitation of strategic agility, it is close to zero. Indeed, no scientific papers found by the author suggest what could serve as a basis for identifying new characteristics a strategic agility facilitator needs to have. Therefore, it made the author of this thesis make her own assumptions about some issues. There was little foundation of information to rely on when the author proceeded to the primary data collection. To offset this limitation, the author tried to review not only multiple scientific articles but also numerous books on facilitation as well as other master and doctoral theses.

Despite being challenged by the limitation described above, this thesis now could serve as a support for identifying what it takes to be a successful strategic agility facilitator and enable firms to sustain their competitive advantage in more detail. Unfortunately, the initial assumption of the author that strategic agility leadership traits could serve as a foundation for establishing characteristics of a modern facilitator did not prove to be accurate. Therefore, it is suggested to conduct further research on possible impetuses that

help understand what influences the emergence of new facilitation characteristics that empower facilitators to conduct strategic agility workshops. Furthermore, it could be interesting to research what are the others factors, except facilitator's characteristics, that help facilitators support companies with pursuing strategic agility.

Moreover, as the primary data for this thesis was collected from the Swiss expert who worked with companies in Switzerland, it is proposed to do research that would focus on a specific culture/nation since its background might significantly influence the requirements for a facilitator. Additionally, separating the teams according to specific characteristics and conducting research on homogeneous teams might reveal valuable nuances allowing practitioners to customize their approaches to strategic agility facilitation.

6.2 Recommendations and Implications

As the results of this study show, there are five emerging characteristics a facilitator needs to acquire for conducting strategic agility workshops. Therefore, it is essential for facilitation practitioners who want to support organizations in meeting VUCA world requirements to find a way of obtaining new essential competencies and functions.

Even though it was discussed earlier that the emerging characteristics might be different in specific industries or types of groups, it is nevertheless advised to the strategic agility facilitators to take the results of this thesis as a ground for self-reflection. The facilitator should think about qualities, competencies, and functions he/she has now and compare them with the list of characteristics needed, which was derived by the author. For instance, it is not enough to only have a desire to help teams. Strategic agility facilitator has to be more precise and be aware that the biggest challenge for the top management is to identify hypotheses and test them.

It is also suggested to reconsider how the facilitator conducts the workshops to enable teams to be strategically agile and see what could be improved, or at which points a facilitator might contradict the characteristics in the list. For example, if a facilitator still tries to make teams come to a consensus instead of compromise, he or she needs to realize that these are the rules of the old strategic planning game. In a new reality, compromise brings as much value.

As for the competency of changing the values, paradigms, and overall mindset of workshop participants, it is recommended for a facilitator to invest a significant amount of time in learning and better understanding the psychological aspects of strategy-making facilitation. The author assumes that since strategy facilitators work with senior levels of management, it is even more challenging to have an influence on them and shift their mindset. Therefore, more professionalism in psychology and its implication is needed, in the opinion of the author.

Moreover, it is proposed to dive even deeper into the client's environment and try to understand organizational issues better. As a facilitator should make top management teams understand that they need to possess certain information before proceeding with hypotheses or test results in order not to be too unrealistic about desired outcomes, the facilitator himself/herself needs to know where to look and what to search for to close the information gap. Therefore, knowledge of the industry and its dynamics is essential.

The last recommendation concerns the facilitation schools, not the facilitators themselves. It is advised to target strategic agility specifically and adjust courses materials for those facilitators who want to keep up with a new trend and be able to assist interested companies. For instance, the facilitation schools could teach professionals how to look for "non-standard" theory, which is not suitable for strategic agility from the first glance, and interpret it creatively. The facilitation schools could then enable facilitators to innovate their approaches to workshops and find creative solutions for the challenges which often arise in a new, poorly explored setting.

7 References

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8 Appendix

8.1 Leadership Traits Definitions

8.1.1 Strategic Planning

Instilling focus and clarity	“The establishment of clear goals at all levels of the organisation; the introduction of the right measures to make sure that these goals were being kept on track; and a series of team-based initiatives designed to sign up people at every level by giving them the maximum freedom in how to achieve the mission”
Generating engagement and commitment	“Combination of open dialogue, engendering respect, sparking collaboration and inspiring initiative.”
Allocating scant resources	“Allocation of resources strictly in accordance with the mission and goals set out in the strategy; limited resources companies have at their disposal are channelled into the right projects and not frittered away by managers whose activities are not central to the change strategy’s main effort”
Fostering collaboration	<p>“Striving for excellence. They believed that the energy created by co-operation was not driven by competition between people or groups. Instead, they believed that the key driver of energy was that each individual and each group individually and collectively strived for excellence. This assumption of excellence was the design principle for much of the selection, promotion and training within the company.</p> <p>A sense of mutuality. If people operated only with regard to their personal self-interest, then deep co-operation was never possible. Instead, they went to great pains to help others understand that only through integrating their interests with those of others would deep co-operation emerge. It was this sense of mutuality, of a shared rather than individual destiny, that was crucial.</p> <p>Co-operation is a behaviour. While the values of co-operation were important, ultimately a co-operative mindset was built from co-operative behaviours. The business then of the executive is to support and encourage co-operative behaviours so over time they become habitual ways of behaving.</p> <p>Being part of a community. Executives, where there was a co-operative mindset, acknowledged that we are essentially social beings and we are fulfilled in our personal and work lives through being part of a community.”</p>
Creating the right milestones of achievement	“Providing the right leadership to inspire the necessary commitment among frontline staff; providing appropriate coaching and development so that this commitment was translated into better performance. Remove the blockages impeding the achievement of this performance by giving staff the authority to operate as needed and providing them with unqualified support”
Managing pace	“Leaders should identify the challenges and frame the key questions and issues that the rest of the workforce should grapple with. Effective leaders free frontline workers from the constraints

	of unnecessary rules and regulations, challenging current roles but resisting pressure to define new roles quickly. At the same time, they keep the organisation in a constant state of flux by throwing out a stream of new goals or challenges, exposing conflict or letting it emerge rather than continually attempting to restore order.”
Empowering the vision and the strategy	“One of the most inevitably visible aspects of empowering a new vision lies in articulating priorities and ensuring that they are respected. Each and every individual within an organization is also a possible source of resistance, recalcitrance and inefficiency unless convinced of the direction set by the leadership team.”
Living the values	“Provide a model for behavior which respects the corporation’s value summary, demonstrate the higher values which provide the foundation and guiding ethical principles of an organization. Among these ethical values there is none more important than personal integrity. Of all of the attributes of leadership, trust consistently emerges in research as the most valued by subordinates.”
Engaging and motivating individuals	“Responding to the need of subordinates to contribute to something greater than their individual selves”
“Going beyond the conventional”	“While understanding that the past is always valuable, limiting oneself to that understanding is never the pathway to new standards of excellence and accomplishment. The essence of strategy lies in differentiation, in creativity and in the art and science of informed action to bring about change.”
Leading from the front	“Demonstrating clarity of vision and indicating collective direction is essential. Careful and effective communication is critical. Remaining positive is a valuable skill, even if it is personally taxing in many stressful situations. Promulgating and policing priorities and policies is particularly important. Disciplining and correcting is necessary, but needs to be done selectively, carefully, constructively and almost always in private. Finding and demonstrating a sense of confidence, common purpose, and belief is invaluable. Any hint of hesitation, disbelief, or uncertainty, without a path to resolution, can be potentially confusing and costly to an entire organization.”
Leading from the center	“Guiding the group’s progress with a less visible hand and influence others to work together toward a desired outcome without overtly driving or dominating the process”
Getting the job done	“Moving from understanding to execution”
An ability to foster innovation and creativity and to exploit synergies between people, sometimes disparate and distant teams.	“One way of fostering innovation is to encourage employees to question the way things are done or decisions that have been made. Removing or minimising barriers (such as bureaucracy and hierarchy) can drive innovation, and so can an ability to exert mild pressure, perhaps by setting deadlines. Techniques that help spur creativity and innovation include brainstorming and mind mapping, as they help individuals to come up with ideas and to see patterns or organise information in such a way that patterns and ideas develop. Encouraging innovation means listening to suggestions with an open mind.”

The intelligence and courage to recognise and learn from mistakes.	“Avoid misinterpreting the lessons of the past or using events to justify current decisions but with a spurious logic.”
The perception and sensitivity to analyse competing options, and the ability to help others to find their solutions.	“Importance of carefully assessing the situation, defining critical issues and specifying the decision, question assumptions and see things from another perspective (such as that of the customer or person most affected by the decision).”
Skills of delegation and empowerment so that decision-making can be devolved to others in the organisation with sufficient time or insight.	“ Delegation: granting a defined level of authority and responsibility within which someone makes their own decisions and implements them. Empowerment: way of letting people exploit their potential more fully. In essence, it means letting individuals get on with their jobs, encouraging those people closest to the action to make their own decisions. It requires support, trust and a willingness to remove obstacles and bureaucracy, encouraging and enabling people to put their ideas for improvement into practice”
The capacity to motivate people so that they are inspired to prevent or solve problems themselves, as well as proactively implementing decisions.	“Leader should understand exactly what motivates individual team members to act, what external influences are affecting them and what the leader’s role is in the process”
An ability to focus others on the twin issues of serving customers and managing change.	“Understand where, how, when and why developments are occurring in order to ensure that the decisions made are not wrong or undermined by changing circumstances”
Skilled communication	“Highlight where the pitfalls and problems may lie as well as the benefits. There should be communication throughout the decision-making process in order to build and sustain support for the eventual decision and to make sure that those affected feel involved”
The courage and ability to make critical decisions.	The definition was not provided in the source. Therefore, the author of the thesis used the internet to find a definition of Critical Decision: “Making a decision on any matter that will or would be reasonably likely to have a material impact on an operational, financial, quality and/or compliance basis, on a Product and/or any of the Services” (Law Insider, n.d.)

Table 8. *Compilation of Definitions of Strategic Planning Leadership Traits (Daniell, 2006, pp. 81–84; Kourdi, 2003, pp. 214–226; Syrett, 2007, pp. 82–93)*

8.1.2 Strategic Agility

Time availability	“The devotion of time necessary for new discoveries and professional, strategically important interaction with outsiders.”
Focused curiosity	“Intellectual curiosity directed towards understanding the surroundings and implying their meaning to work and to strategy.”
Creative thought process	The definition was not provided in the source. Therefore, the author of the thesis used the internet to find a definition of Creative

	Thinking: “Producing something new by seeing new patterns in existing elements” (American Psychological Association, n.d.)
Bias for action	“Ambition to make one’s practice better and challenge the status quo by trying new things.”
Reliance on peripheral players	“Shape future leaders by sending employees to the periphery of an organization where they can be distant enough from the core and look at things critically while learning and gaining experience in different contexts enabling agility.”
Judgement suspension	“Ability to accept ambiguity and think thoroughly about new suggestions by moving away from personal emotions and heuristics of experience.”
Contextual awareness	“Ability to catch delicate, difficult to analyze nuances of a specific context.”
Balance between abstraction and details in language	“Combination of the conceptual richness (ability to think about the firm and its nature while staying at a distance) and contextual awareness.”
System thinking	“Seeing a system as a whole while identifying interdependencies within it and seeing how its actors may evolve and reconfigure.”
Option logic	“Being open to experiments and committing some more to learn more, knowing full well the result from the learning may be to de-commit”
Contingent commitments and adaptive learning	“Shifting commitments in real time rather than blindly execute a pre-determined plan -> have conditional commitments.”
Matrixed processes	“Breaking stiff resources allocation, ownership of it and the right to use and moving to the matrix structure where each individual's performance is conditioned by that of many others', and by how successfully she or he negotiates with them.”
Foster adaptation, not control	“From flexible workplace configurations to lateral peer selection and pressure mechanisms rather than hierarchical control”
Project rather than a position	“Employees can grow rather than fixed detailed job descriptions are an obvious enabling HR practice. conceive of their “career” as a succession of projects, of experiences, not necessarily as the steady progression from smaller to larger, or more managerially taxing permanent units”
Self-sufficiency and mutual forbearance	“Defining one's strengths and limits, Matching the risks one takes with the level of confidence one has, Complementing it with “after action” reflective analysis and feedback and other self-awareness methods”
Cabinet responsibility	“Each is engaged toward the whole set of team decisions and their consequences as if each decision were personal”
Generalized reciprocity	The definition was not provided in the source. Therefore, the author of the thesis used the internet to find a definition of Reciprocity: “Helping each other; Sharing advantages” (Cambridge University Press, n.d.)
Mutual knowledge of skills, roles, and motives	“The ability to contribute original knowledge and expertise and to relate to the knowledge and expertise of others on the team”
Cognitive diversity / Decision integration	“Differences in cognitive styles between dreamers and visionaries, hard-nosed entrepreneurs, tough operating leaders with a passion

	for dealing with concrete issues, congenial business builders -> minds working in different ways”
Humbleness	“Agile leaders must be open, willing to learn, and seek input from both inside and outside their organizations. They also need to trust others who know more than they do”
Adaptability	“Acceptance that change is constant. When new information triggers a leader to change their mind, it should be seen as a strength and not a weakness. Agile leaders adapt their behaviour in the short term based on their ability to make evidence-based decisions”
Visionary	“Having a clear sense of the long-term direction, even in the face of short-term uncertainty”
Engagement	“Willingness to listen, interact, and communicate with internal and external stakeholders and a strong interest and curiosity in emerging trends”
Hyperawareness	“Focusing on spotting emerging opportunities or competitive threats. They are engaged, seek new insights, and adapt in response, but they are also aware of the need to provide guidance through a strong vision, as the potential for change threatens to overwhelm a linear strategy”
Informed Decision Making	“Using available data to make evidence-based decisions”
Fast Execution	“Willingness on the part of a leader to move quickly, often valuing speed over perfection”

Table 9. *Compilation of Definitions of Strategic Agility Leadership Traits (Doz, 2020, pp. 3–12; Wiraeus et al., 2019, pp. 201–204)*

8.2 Leadership Traits – Secondary Data Coding

8.2.1 Strategic Planning (Second Round)

traits	codes								
		An ability to foster innovation and creativity and to exploit synergies between people, sometimes disparate and distant teams.	The intelligence and courage to recognise and learn from mistakes.	The perception and sensitivity to analyse competing options, and the ability to help others to find their solutions.	Skills of delegation and empowerment so that decision-making can be devolved to others in the organisation with sufficient time or insight.	The capacity to motivate people so that they are inspired to prevent or solve problems themselves, as well as proactively implementing decisions.	An ability to focus others on the twin issues of serving customers and managing change.	Skilled communication.	The courage and ability to make critical decisions.
instilling focus and clarity	<ul style="list-style-type: none"> establishing clear goals measuring if goals are kept on track involving people from different levels of organization giving employees freedom 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
generating engagement and commitment	<ul style="list-style-type: none"> having open dialogues creating atmosphere of respect empowering encouraging creativity and innovation calling for initiatives 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
allocating scant resources	<ul style="list-style-type: none"> allocating resources strictly according to a plan 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
fostering collaboration	<ul style="list-style-type: none"> trying to achieve best results combining own interests with the ones of others encouraging cooperation making everyone feel a part of a community inspiring commitment coaching and developing employees giving employees the authority giving employees support 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
creating the right milestones of achievement	<ul style="list-style-type: none"> identifying the challenges forming issues for employees to tackle with giving employees necessary freedom challenging existing roles of employees keeping an organization in the state of changes identifying goals to achieve not trying to keep everything in order 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
managing pace	<ul style="list-style-type: none"> forming issues for employees to tackle with giving employees necessary freedom challenging existing roles of employees keeping an organization in the state of changes identifying goals to achieve not trying to keep everything in order 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
stating priorities clearly	<ul style="list-style-type: none"> valuing the past aiming at differentiation being creative taking informed actions 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
being an example	<ul style="list-style-type: none"> valuing the past aiming at differentiation being creative taking informed actions 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
go beyond the conventional	<ul style="list-style-type: none"> communicating vision communicating collective direction communicating effectively remaining positive communicating policies and priorities demonstrating the sense of confidence demonstrating belief no demonstrating uncertainty and hesitation 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
lead from the front	<ul style="list-style-type: none"> communicating vision communicating collective direction communicating effectively remaining positive communicating policies and priorities demonstrating the sense of confidence demonstrating belief no demonstrating uncertainty and hesitation 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
influencing others	<ul style="list-style-type: none"> communicating vision communicating collective direction communicating effectively remaining positive communicating policies and priorities demonstrating the sense of confidence demonstrating belief no demonstrating uncertainty and hesitation 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy
get the job done	<ul style="list-style-type: none"> executing 	<ul style="list-style-type: none"> making employees think critically minimising bureaucracy and hierarchy creating mild pressure encouraging creativity and innovation being open to suggestions 	<ul style="list-style-type: none"> analyzing lessons from the past making evidence-based decisions 	<ul style="list-style-type: none"> analyzing the current situation identifying critical issues thinking critically taking different perspectives 	<ul style="list-style-type: none"> giving employees the authority allowing employees to unlock their potential supporting employees having trust encouraging employees to act 	<ul style="list-style-type: none"> analyzing causes of motivation analyzing factors influencing employees identifying leaders' role 	<ul style="list-style-type: none"> analyzing triggers of development making evidence-based decisions forecasting future changes 	<ul style="list-style-type: none"> communicating possible problems communicating future benefits communicating constantly making employees feel involved 	<ul style="list-style-type: none"> having courage and capacity to make decisions significantly impacting the strategy

Table 10. Strategic Planning Leadership Traits Initial Coding

8.2.2 Strategic Agility

		Humbleness	Adaptability	Visionary	Engagement	Interdependencies	Informed Decision-Making	Fast Execution
Time Availability	<ul style="list-style-type: none"> Devoting time Seeking discoveries Interacting with outsiders 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Focused Curiosity	<ul style="list-style-type: none"> Understanding the surroundings Interacting according to situation 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Creative Thought Process	<ul style="list-style-type: none"> Producing something new by seeing new patterns in existing elements 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Bias for Action	<ul style="list-style-type: none"> Having ambition to be better Challenging the status quo Trying new things 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Reliance on peripheral players	<ul style="list-style-type: none"> Sending future leaders to the periphery Making future leaders distant from the center Teaching future leaders to think critically Making future leaders have diverse experience Making future leaders be agile 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Judgement Suspension	<ul style="list-style-type: none"> Accepting ambiguity Considering new suggestions Not relying on personal emotions Not relying on one's own experience 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Contextual Awareness	<ul style="list-style-type: none"> Catching nuances 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Balance between abstraction and details in language	<ul style="list-style-type: none"> Combining firm's specification and overall generalization of the situation 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
System thinking	<ul style="list-style-type: none"> Seeing system as a whole Identifying interdependencies within a system Seeing evolution of system's actors Seeing reconfiguration of system's actors 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Option logic	<ul style="list-style-type: none"> Conducting experiments Being able to de-commit from the main decision 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Contingent commitments and adaptive learning	<ul style="list-style-type: none"> Shifting commitments Having conditional commitments 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Matrixed processes	<ul style="list-style-type: none"> Allocating resources flexibly Having mutual responsibility for performance 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Foster adaptation, not control	<ul style="list-style-type: none"> Having workplace configurations Selecting peers from the same level of education Having pressure mechanisms Not having hierarchical control 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Project rather than a position	<ul style="list-style-type: none"> Creating flexible job tasks Seeing career as a sequence of projects and experiences 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Self-sufficiency and mutual forbearance	<ul style="list-style-type: none"> Knowing own strengths and weaknesses Having the capability of taking risks Having reflection sessions Giving oneself feedback 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Cabinet responsibility	<ul style="list-style-type: none"> Making decisions collectively Having collective responsibility for decisions outcomes 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Generalized reciprocity	<ul style="list-style-type: none"> Helping each other Sharing advantages 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Mutual knowledge of skills, roles, and motives	<ul style="list-style-type: none"> Sharing knowledge and expertise Understanding of knowledge and expertise of others 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient
Cognitive diversity / Decision integration	<ul style="list-style-type: none"> Having various cognitive styles at 	<ul style="list-style-type: none"> Being open Willing to learn Seeking inputs from external and internal environments Having trust in those who know more 	<ul style="list-style-type: none"> Being open to changes Seeing changes as strength Having adaptive behaviour Being able to make evidence-based decisions 	<ul style="list-style-type: none"> Staying focused during volatile times 	<ul style="list-style-type: none"> Being open to external and internal environment Following new trends 	<ul style="list-style-type: none"> Being able to identify opportunities and threats Seeking new information Being adaptive Being able to guide Communicating 	<ul style="list-style-type: none"> Being able to analyze and leverage the available data 	<ul style="list-style-type: none"> Being efficient

Table 11. Strategic Agility Leadership Traits - Initial Coding

8.2.3 Strategic Planning & Strategic Agility Leadership Traits Comparison

The Microsoft Excel sheet containing the process of coding is too large to fit the appendix. Therefore, the reader is kindly asked to request the author of this study to gain access to the relevant Microsoft Excel document upon need.

8.3 Interview Transcript – Leadership Traits & Facilitation Characteristics

Interviewee – Kerstin Pichel, Professional Strategy Facilitator; Interview date – 02.07.21

Diana: So I first wanted to start with presenting the characteristics of facilitators for traditional planning and see with you what qualities do you actually also apply in Agile strategy. So what could be actually transferred to the existing skills of traditional facilitators, what they can take with them to agile facilitation?

Kerstin: Okay. And I just say, okay, this one, yes. This one, no, this one, yes. This one, no.

Diana: Yeah, maybe you also can... maybe you have some comments about that. You know, maybe something from real experience if part of the quality applies and part of that was wrong. Yeah. Just whatever you think about it. So actually, for qualities, I am not even sure if we can distinguish between agile and strategic planning because, for example, “good communication skills”.

Kerstin: No, in agile, you don't need them /laughs/. Of course, yes. Yes.

Diana: So yeah, my concern for qualities was that it's that each facilitator has to have those qualities, not the only strategy facilitator, but I don't know, just a group discussion facilitator; you also always have to have some particular qualities.

Kerstin: Yeah, I think so. Probably. That's true. We'll see. Yeah, let's, yeah, let's start with them.

Diana: So first, for traditional planning, willingness to help others. So you come to the workshop, and it's your genuine desire to help the groups to plan their strategy.

Kerstin: Okay, wait, yes, of course. But when I thought about our meeting, I started to brainstorm what comes immediately to my mind, when I think about agile strategy, moderation or facilitation that I did, what is so different and so special, and, for example, willingness to help others, something that really is, to me, very different and very special is to help them define hypothesis and tests, especially tests that are really insecure, or the outcome is insecure, it really may happen when they come to the point “we were wrong”. And I experienced it is very hard for top management teams to take that step, to really be brave enough to define a hypothesis or test that may be analyzed as wrong. Do you see

what I mean? Yeah, I had one workshop with a company developing surgical instruments and one with an insurance company. And one with an IT marketing company. And they all had very big problems too. Yeah. To expose themselves to hypotheses or thoughts that are...even, especially when we talked about “Okay, we will test that now with customers. Oh man, what happens when... what will our customers think of us when we fight? When they say, oh, it's bullshit, we don't need that, we don't want that”. How can you come to these ideas? It's, and, you know, those were projects that would have cost, one would have cost more than 2 million francs. And the normal way was to...“We assume that customers need that. So we just go for it, and we'll implement it”. And in our workshop, helping was really to tell them, “Why don't you have a closer look before you invest 2 million francs? And then finally find out, nobody needs that nobody wants that? Why don't you expose yourself a little bit and then save 2 million if you find out it's wrong”. I mean, that is, is better, then you know, just spending the money and hoping that it will work out. And that is something when you write willingness to help others. That is something that occurs to me as very... it's like really taking somebody at hand and making one step together with the top management team, which is very uncommon, this way of defining an insecure hypothesis and exposing your own top management insecurity. That is very uncommon. And it's really, I think, one of the biggest challenges; I had one workshop where it really didn't work out, they weren't really you know, with all energy they had, they were trying to announce “we don't need that, and we know it, and we don't want it”. And until the end, we had a workshop of three hours; until the end, they were not willing to really think about that, and talk about it and have a closer look at it. So when you say a willingness to help others, that comes immediately to my mind. I think that's really the biggest help that you need to... yeah, to hand in when you have agile strategy making.

Diana: Okay, so I see that, well, willingness could be applied both to planning and agile, but in agile, we have this particular distinction, which could, which is not a case for traditional strategy. Yeah. Okay, good, good. Then ability to forget about your own ego and your own interest and pursue only the ones of your client.

Kerstin: Yeah, that's, that is really always the case in traditional and also in agile planning. And very often, I, especially at the beginning of my career, I thought I know what to do. I see the solution. I see what they should try. And, and you have to let go and

say it's not my decision. It's their company. They know better than me what makes sense. So yeah, that's always the case. No difference. Yeah.

Diana: And I think the same for good communication and also listening skills.

Kerstin: Yeah.

Diana: Then you have to be empathetic, yet authoritative.

Kerstin: Yeah, that's also very important for both ways. Yeah. Both situations. You know, there's one school of facilitating - that's the process facilitating, you have the experts consulting and process consulting. And if you do the process consulting and the process facilitating, you are supposed, in the facilitating school, you are supposed to not manipulate at all. Just give soundings, give feedback, but not intervene. And I think that's wrong with strategic facilitation; sometimes you really have to intervene and say, "Okay, that's not the point right now; we are talking about something else. Let's get back to that point. And why don't you have a closer look at that? Do it right now; consider the good and bad about it". So yes, I think it's very necessary for both situations. In agile situations, like I just said, sometimes I can feel that empathy, it's the, for me, the balance between empathy and authority is harder in agile because you have a lot of open, not decided topics, and also the top management teams, sometimes they, you know, they fall over one edge and get insecure themselves and get all nervous and want to get things done and decided, and so the empathy, yeah, the empathy and authority balance for me is... I myself don't know yet. And I'm not that experienced yet. Or when to say, "Okay, you know what, I always know in that situation, this is happening. Don't panic, we'll go on". I myself don't know exactly. Are we on the good track, on the right track? Or are we wrong? So that gets hard. It's necessary also, but it gets harder. Can you understand what I'm saying?

Diana: Yeah, I can. I even see how I will then categorize everything. That's good.

Kerstin: Okay. Right. So um, yeah. Is this is it helpful for you the way I'm talking and describing right now?

Diana: Absolutely. That's much better than you just say yes, because I also have, like, built logical connections. And that's, that's good. Thank you. So the next quality is to be fair to everyone and honest with everyone.

Kerstin: Yeah. Yeah, that's a challenge in both situations. Like I just mentioned before, the more experienced I am with the process and with discussions, the more capacity I do have to also have a look on what's the team dynamic? Who is like the underdog? Whom do I have to support? And it gets harder when I'm not that familiar with the process. And when I'm insecure myself, then I have to concentrate a lot more on the process. So it becomes a little bit harder in agile strategy-making. But it's, of course, it's important in both situations.

Diana: Then, well, I think that's even partly connected to what you just said. You have to be self-disciplined, logical, and consistent.

Kerstin: Yeah. And also, it's always the same if you do it the first time or if you're not that familiar yet, it's hard to be self-disciplined, to be consistent, because, you know, when, in the normal strategy process, I can do it half asleep. Because I know - yes, now we come to the SWOT analysis. It's always the problem in the SWOT analysis, people are too fast in evaluating things and judging, and I have to do it that way, I use that tool, then it helps them, and in the agile process, okay, defining a test that really makes sense and defining outcome indicators that are really helpful. Are they really helpful? And then I see they don't know how to define indicators. How can I help them? You know, it's always like a stress moment, one stress moment after the other and a lot of unknown situations, and then these self-disciplined, logical, consistent activities are becoming harder.

Diana: Okay. So, now, I would move to competencies, and here, probably there will be some differences, we'll see. So, the first competence for traditional planning is that facilitator needs to help people responsible for strategic planning to understand the importance of collective decision-making. Is it also a case for agile strategy, or do people or leaders there already know the importance of collective decision-making?

Kerstin: No, you can't say that in general because it depends on the company. You know how experienced the company is with agile decision-making and how consistent they do it in their everyday decision-making. So when that is just the normal culture, then you don't have to help them that much. But if it's a very traditional company and you know, they are not used to collective decision-making themselves, then, of course, that is an add-on even more difficult activity in the agile decision-making.

Diana: And those traditional companies claim to be agile already from the beginning, or they hire you to help them become agile.

Kerstin: You know, what does it mean? How did you define that you are agile? A lot of companies are agile in some parts, like realizing or putting to action strategy; they do have agile projects. For example, I have discussions with a credit card company. And it is very agile in project management in IoT development that is established for more than five years or four years now. But it is different if you are agile in project development or project realization or if you want to be agile in decision-making and in strategic decision-making. And it also for the leaders it is a difference they really have to give up or yeah, that's always the question. Can you or should you as a decision-maker give up the strategic responsibility for deciding about the next two or three years and really make a difference in the movement and the positioning of the company for the next years. And that is what, when you talk about the collective decision-making, that is what even becomes more important or more virulent in agile decision-making? Who decides, you know, who does what kind of testing and who decides, because of the outcome of that testing about the ongoing activities, and for example, the insurance company, they do have a spin-off for mobility, and in that spin-off, they do testing about what kind of mobility services do the customers really want to have? And what are they willing to pay? And what combination of products does make sense? And it's, they do a lot of testing, and it's ongoing and very iterative. And if you would have to tell them you always have to get back after every testing to the decision-makers, and then they say, okay, we go on, or we change on whatever it would take years, now, they are just you know, the competency is given to them, delegated to them to the spin-off and, and they can just iterate forward and go on and go on, and that is very, sometimes very necessary to really have an agile strategy developed. And then, the collective decision-making or even the delegated decision-making is becoming a lot more important than in the normal traditional strategy.

Diana: Yeah, okay, I see. Then create a setting where everyone is encouraged to express their thoughts and ideas, so nobody is afraid of the leaders' opinion.

Kerstin: Yeah, that's the same importance.

Diana: Okay, then make the group understand and accept everything which is communicated and given by you as a facilitator.

Kerstin: Yeah. I don't know if I agree with everything or accept everything. Of course, that may be a little different; it is important in both situations, I think because you as a facilitator have to be really the chief of the process. So when I say we are not discussing this now, we are discussing it later. It has to be talking about authority; it has to be clear and done, and like I said before, when you yourself are not very common with the agile process and you yourself don't know exactly yet if it makes sense to have to stay this with discussing the outcome indicators. Now, although we don't know the hypothesis yet, maybe that could be a way to get to the hypothesis. So then it becomes harder to really make everybody accept what I'm saying because I don't know it myself yet. Do you see what I mean?

Diana: Okay, I see. Yeah. Yep. The next competency would be to fully understand the organizational issues of the client, what's required.

Kerstin: Yeah, that is important in both settings. I don't know if any facilitator can realize that. Because you never fully understand it, but it is important in both settings.

Diana: I guess the difference here is the setting itself.

Kerstin: Yeah, yeah. There are probably different issues or topics. But I don't know even that I don't know.

Diana: So, to have experience in conducting strategic planning workshops, but here it's specifically strategic planning, so I guess the agile facilitator has to have experience in agile workshops.

Kerstin: Exactly, exactly. And I think that's exactly what I was talking about so far. That's something I experienced very extremely. I'm so used, for more than 20 years, I'm doing strategic planning workshops. And I'm very relaxed and experienced. And now I'm doing agile strategy workshops. It's like, I'm not experienced, I don't know how to conduct them. Is it better to have decision making now? Or is it better to have a brainstorming now? For example, I did conduct a workshop where with a studio for media architectures, that's a company, they do sound and light installations for huge buildings, like museums or governmental buildings. And so it's half an art and half an IT and technology company. And, I thought we had three hours of workshop with a top management team, they are having an idea about a robot for museums. And they were trying to sound the idea in an agile setting with hypothesis and testing and so on. And I thought okay, we'll do it. You

know, we'll start with like, little intervention from my part. This is my museum. I will show them around, I will explain them, and I'm the robot. I will explain to them, which pictures I do have, they can guide me so they make like experiences with a robot to themselves. And then they are able to understand what testing can help. So I did that. And they found it very interesting and were very flashed by what they experienced with the robot. But it did not help at all for the next step to define the hypothesis. They were stuck. They were unable to say okay, what hypothesis do we have. And then I was like, how do I get to those hypotheses now? How can I make them if that didn't work? What will work? How can I make them think and talk about hypotheses? So that was exactly that point. I'm not that experienced yet that I can say, you know, I conducted those workshops 30 times, and I know that it's always a problem to get to the hypothesis definition. And I do it that way. Because that is like a little trick. A little, you know, thinking around the corner to help them to get to the hypothesis definition. I'm not experienced in that agile way. And yeah, and that would be very helpful and important, but I'm at the beginning once again.

Diana: Yeah. Okay. I see. Then, being able to apply theoretical concepts, let's say such topics as leadership or team development or experimental learning, not just know the theory, but also try it with the teams.

Kerstin: Yeah, very important in both settings, and like before in the agile setting additional topics or theoretical concepts are necessary like agile and what is agile? And what is important for agile like decision-making. Or is it in experimental learning? Yes. Okay. Yeah. So it's, I think, or I suppose, I'm not quite sure, but I suppose I experienced that additional theoretical background would be helpful. I only know I can explicitly say, the agile theory is helpful. But I think also not deciding but taking into account information. Like Theory U for example, I don't know if you know that by Otto Scharmer. It's about how to leave the surface of communication and get into deeper communication and really understand each other and listen. I think that is something especially when you have the test experiences, it is necessary to slow everything down to not to say, okay, five people said this and that, but what does it really tell us? What does it really mean for our strategy? Where are the unknown information gaps yet? I think that is additionally becoming important in strategy making, yeah.

Diana: So since you're experienced in traditional planning already, and there's lots of literature about how to facilitate it, you probably can look at the books and then apply it in real life, but for agile, as I understand, you have to look for external sources, which are not maybe connected somehow with agile and you yourself make logical connection that actually could be applied. Right?

Kerstin: Yeah. And, while doing facilitations, I realize you know, I'm teaching facilitation also, and I always teach, there are at least three dimensions that you always have to be aware of. One dimension - the process, another dimension is the team and the third dimension is the topic. And when I'm doing that, for a facilitator, strategy facilitator, it's really challenging to have those three dimensions always going. And when you change that or move that to agile, I think it's still those three dimensions, but they are combined in another way or are different special issues arise in those three topics, like, for example, in the content, it's about testing and how to define tests and indicators in the team dynamic. It's about exposing oneself to insecure hypotheses. And in the process, it's not, you know, not collecting, deciding, but trying to iterate, so everything changes a little bit. And, yeah, while I'm doing it, I realized, wow, I could use something now that this is a phenomenon, I could use a theory for understanding it, structuring it, talking about it and having a solution or a next step, at least. And I'm searching while I'm in the workshop, I'm searching desperately for a theory or help or structure. And I realized, I don't have any answers, free-floating. It's like surfing on a wave. And I have no idea how to do it.

Diana: Still a lot to explore. So that was it about competencies for strategic planning, and now it's about functions. The first function is to... like you have the steps defined in advance for the workshop or strategy meeting, and you have to guide the group through those steps. And together, achieve the result which is accepted by everybody.

Kerstin: Yeah, that's, I think, also important for the agile decision-making, maybe even more important, because the orientation within the process, you know, the group really relies on you as a facilitator to... "Okay, tell me what to think about, tell me what to do or decide next. That's your process. And all of us are, when you tell us to think about blue, we think about blue". And so in an agile decision-making process, nobody is very experienced, especially in an agile strategy process. So everybody is a little insecure and relies even more on somebody telling them to think about blue. So that is important, maybe even more important than in the well-known normal strategy process. You know,

a lot of companies do strategic planning for, I don't know, more than 50 years, and they know now what is coming up. Now a strategic option has to be defined. They can even do it themselves. In an agile strategy process that's different. It's really like, what do we have to do next? And you have to tell them, although you don't know yet.

Diana: And what is the reason why strategic planning companies hire facilitators if they are experienced already?

Kerstin: Yeah, because of the three dimensions. One is the process and it's challenging for everybody if you have to balance and coordinate those three dimensions. It's hard and difficult. And that's why you always say, if you are part of the decision content yourself, you can't facilitate, you really need somebody who is neutral and does not need to himself, bring in some content or make some decision content be important. So that's the facilitator you really give up the coordination task.

Diana: Okay. The next function is to motivate the group members. And also convince the ones who don't want to participate to take part in the discussions and to keep people enthusiastic.

Kerstin: By the way, I think those are very relevant characteristics, functions and so on. Very well done. Yeah. I think that's just the same. It changes maybe a little bit because it's not so much take part in the strategic planning discussion, that sounds so easy, it's more take part in really shifting your values or your paradigms from “we know what” to “we want to find out what to do”. We take rejected hypothesis as a good source of information and not as embarrassing. So that is the little difference if you could change it to agile but more or less the same.

Diana: In agile, it's more about shifting the mindset of people.

Kerstin: Yeah, I think it's really, in the agile strategy decision-making, it's really another paradigm. It's not so much “we are the top management team and we tell everybody where the right direction is about”, it's more “Okay, we want to find out if our assumption is correct. And if it's not correct, it's no shame on us, we are well paid we are responsible, how can we not know... but it's Oh, wow, we found out there we didn't have enough information and we took wrong assumptions”. And that's really another mindset of the top heroes to the top analysts.

Diana: Do you actually see the difference? Like do you see the people in agile strategy-making are more enthusiastic about all those tasks and discussions during the workshop due to the novelty of the concept?

Kerstin: Maybe, you know, maybe it depends on who you have in the team. We had a workshop with the IT marketing company. They do online marketing for other companies. And also with the studio for media architectures. We had workshops with three board members. And in both workshops, one of them, the CEO, was not enthusiastic at all. He didn't like the agile way of iterating going forwards, you know, very logically that the thing is in Agile, you really define explicitly what you think what your hypothesis is. And in both companies, the CEOs were more like the going forward decision-makers, you know, "we just do it, we just try it, I always make good experiences with my intuition and go ahead". And they are not enthusiastic about this way of this disciplined defining of assumptions, and testing and what has to be an indicator after when the test is done. "This is so complicated. Can't we just try and do it?" And for example, with the media architectures studio, they had already, like testing organized with a museum in Bern, and when we were talking about... "why you are testing? What will you have a closer look at? What informations will you collect from the testing?", they had no idea. They had just organized tests in this museum with a robot, not knowing what to finally pull out of the tests, which information to gather. And so we told them "you know, it's a shame when you do those tests and afterwards, you realize, uh, we should have asked, for example, the museum staff. How many people did reject the robot? And why did they reject the robot? And how many people did stay close to the robot, even went towards the robot". If you are not aware of what you want to find out and can't brief the museum staff, you won't have all this information. But the CEO himself found it very complicated. And it took a while to really make him see, yes, it is worth to sit down and think for one hour of what do we want to find out. So, they are not always more enthusiastic. But then at the same time, what happens is we had like, after two workshops with different companies, we had the impression that there, very often in the top management teams, there is one person that is more the forward leader and one person, at least one, that is more the reflective type, resource-oriented, analyzing type.

Diana: Not really easy-going or not necessarily? Like he doesn't dare to do something before making sure that everything will be safe?

Kerstin: Yeah. Yeah. You know, that's the interesting thing. I don't know if it's just because we did the agile and strategy decision-making but I don't think so. What we found is that... we have eight partners, research partners, and we were presenting them our experience that we have the idea that very often in top management teams, both roles are given and, you know, it's like, the more the one leans out of the boat, and it's more the forward and pushy type, the more the other one has to lean out of the other side of the boat and be more negative, reflective, careful type. And I think that's like a balance that is taking place all the time. And those reflective type people were enthusiastic about the decision-making. And you know what's so funny about it is everybody thinks agile is fast, is forward, it's trying. And we were just like, disappointing them because agile is slower and it's more analyzing and it's more explicit. And so that is when we talk about enthusiasm. No. Some were enthusiastic, who was not supposed to be enthusiastic in the very beginning. And others were disappointed who were not supposed to be disappointed.

Diana: Okay, I see. Okay, then stimulate the thinking of the group members, make them think.

Kerstin: Both.

Diana: Okay, then recognize the tendency of the group members to be either too optimistic or so unrealistic about something and then prevent them from doing that by challenging their assumptions.

Kerstin: Of course, but that's really exactly the same for agile strategy making. That's what I explained to you with the boat and the two roads, just before, and I think it's not only recognizing and make them aware of being too optimistic or too pessimistic, but also make them aware of what they know and what they don't know, or what they need to know. Because, you know, it's one thing to say, it's like digging a little deeper with that point, it's one thing to say, hey, if you want to invest 2 million, really, you have to consider if it's just your optimistic idea, and if that makes sense or not, or I think it does not make sense because blah, blah, blah. And it's another thing to say, what do you need to know, really to consider it more briefly yourself? What could be hints or indicators where you would say, those two million won't make sense. And so it's, a little deeper than optimistic and pessimistic, it's a little more recognize what information you do have and which one you would like to have or need to have?

Diana: So it's more about making them evidence-based?

Kerstin: Yeah.

Diana: Does it happen more often in Agile settings, or it's the same, the same frequency for strategic planning?

Kerstin: It has a bigger priority in agile settings because evidence-based is one of the main principles of agile. That's why you do agile because you iterate and you want to find out something. And in traditional or strategic planning, you do have your SWOT analysis, your information basis, that's always more or less the same. And because of that, you do make your decisions. And of course, I mean, that's why we do agile, this information basis very often is not very valid. You don't, although you do have this information, you still don't know, the information that is very relevant for your decisions. And you know, in strategic planning, you did step one, step two, step four, step five. Make a decision. And it's not so much a topic or an issue to be evidence-based on a smaller level or more detailed level.

Diana: I see. What's next? Yeah, ensure that the group came to a consensus rather than compromise.

Kerstin: Yeah, that is more important in strategic planning than in agile, because in agile, you do really the small iterations. And even if we don't have the consensus, and just the compromise, you say "Okay, let's try that way". If you find out, no, it's not working, you can shift again. So in agile, it's not "now a decision. And that's valid for the next five years", but it's more about taking little steps.

Diana: So actually, the pathway is like to come to a compromise first and try someone's idea. And it might work. And actually, afterwards, you come to a consensus, because it worked.

Kerstin: Yeah.

Diana: So ask questions and summarize the data. I guess it's applicable for both. Also to analyze the information, the collected one and presented and clarify to people, do you actually need to clarify?

Kerstin: In strategic planning, that is a typical task for expert consulting, they collect the data, analyze it, they present it. When you do the process consulting, it's not me who does all the analysis, but team members or somebody else. And the clarification is then also

not only my task, I of course, very often I do see where to clarify it or what to do about clarification next, but we do it all together or I make the presenting teams discuss. So that is about strategic planning and transferring it to agile, I think it's also not me, but the test teams and I think that is something I would love to facilitate such a situation once. I did not yet because I think that it's a very important and fragile step when the test teams come back with information about their testing, what they found out and presenting it in a way and in a structure that the decision-makers, so the other team members understand and really are able to listen and to work on with the information they get, what does that mean for our strategy? Like for example, I told you, the insurance company has the spin-off about mobility and they had a lot of discussions and interactions with customers and partners, and they had for example interaction with the railway company, and during this discussion, the railway company told them “you know, we are not that interested in your mobility stuff. But you have already a lot of experience with building up business ecosystems, we see that in your mobility spinoff, you did build up a little business ecosystem, and you're able to manage it. And that is very important for us”. And the one who was talking to the railway company, he told me about this feedback. And but, you know, presenting his testing experiences to the top management team, there was no slot or no possibility to talk about this additional information. It was just about what does the railway company want? Like for pricing and products? And, yeah, all this detailed business model information stuff. And I think, for the whole insurance company group, it would have been strategically important to hear and to understand, “aha, business ecosystem capacity or ability is something that we can sell on the market. It's not so much mobility, but it's a business ecosystem, ability and competency”. And I think when you do testing, you get a lot more information than just point ABC and to be able to present, to be aware yourself of the strategic impact of that information to present it. And then to clarify it, that is becoming even more important.

Diana: And do I get it right that in strategic planning workshop, there are only the decision-makers who take part, and in agile strategy making, it's also a testing team, who takes part in workshops?

Kerstin: We are trying to define different roles. And one role is a testing team. Another role, we call it the hypothesis owner, you know, the one who says, “okay, we should build up a mobility ecosystem”. And then you have the decision-makers. So it's like three roles. And either the testing teams present the experiences, in one way for sure, they will explain

and present the experiences to the hypothesis owner, and then he has to present it to the decision-makers or all of them talk together. But it's important that the information is structured in a strategic way for the testing team or by the testing team already. And then if they are not the presenting ones, by the hypothesis owner to the decision-makers.

Diana: And you mentioned consultants in strategic planning, do agile teams also have consultants who also take part?

Kerstin: Yeah.

Diana: Okay. So then in strategic planning, it is the consultant who gathers and collects and probably presents information. And you said either the testing team or hypothesis owner presents the information in agile. Is it sometimes the case that they present it to consultants and consultants present it to decision-makers?

Kerstin: In Agile decision making, I don't know yet. I have no experience with really agile strategy-making or decision making in top management teams. I'm not quite sure, maybe it does exist, but I think we are the first ones to try it. I know that consultants like Boston Consulting Group, for example, or McKinsey, are out there consulting top management teams to make agile decision making also or foster agile decision making. But you know, how they exactly work and what they present? I have no idea. I don't know. And also in strategic planning, it can be consultants, but it depends really on the type of consultancy. If you do have expert consultants, it's them presenting. And if you do have process consultants, it's the team working and presenting to each other in the process consulting as facilitators just coordinating the process.

Diana: So process consultant that is actually facilitator.

Kerstin: Yes. facilitator and also like the whole process, it's like, more like a strategy project owner or manager, you know, I'm process consultant. So I say “okay, I work out with a top management team. Which workshops should we do? Who should decide? Who should be integrated? Which topics? Do we have to dig deeper?” So it's, it's not only facilitating the one workshop but the whole process. How is it designed, designing the decision making process.

Diana: Hmm. So okay. So that's actually the core difference between facilitator for agile strategy and strategic planning? Like, do I get it right that in strategic planning, you

coordinate the whole process, while in agile strategy, only this is a small fraction of the process, only the workshop?

Kerstin: No, in agile strategy making, it's also the whole process. It's also who would take what role? Do we have a hypothesis owner? Do we have testing teams? How do they work? When do they work, and then you probably can't plan the whole process from scratch. But you can say "Okay, we'll get together for a workshop. And we'll talk about the most important pieces that have to be tested. And then we will get together once again, and participants will be blah, blah, blah, blah. And we will talk about tests and define tests. And then we will see how long those tests need and when we will get together once again, to talk about the outcome of the test. Or how you will coordinate that within your company and you don't need me to talk about the test outcomes". So that's still you are designing the agile decision-making process that you probably are not able to say exactly on the fifth of July and on the seventh of August and so on, that's easier in the strategic planning because there you don't have iterations and you don't have insecure time slots.

Diana: Okay. Um, then enable the group to stop having circular discussions with the particular outcome.

Kerstin: The same.

Diana: And smoothly manage the resistance to change which is associated with the strategy making.

Kerstin: That's a huge topic. Yeah. And I think that is also relevant in agile strategy-making but I don't know yet. That is something I can't tell yet because maybe it's a little easier because people are thinking during the iterations, it's not like collecting data and deciding and then you are "I don't want this to be decided because it's not good for my function or my group or my team". When you do the agile iterations, it's more little by little going forward. And maybe then it's not that hard anymore to think about the changes, you already did think about it, but I'm not secure about that.

Diana: But I see the logic behind that. And the last one - spot and handle conflicts within the group.

Kerstin: Yes.

Diana: So they happen both in agile and strategic planning. Okay. And how can you actually do that?

Kerstin: I don't know. It's really like I said, it's the three dimensions. So I have the team dynamic and the content and the process. And when the team dynamic takes place, and I can't tell you, Diana, it's very intuitively that I realized "Okay, somebody is really unnerving everybody, including me, and then it's trying to see the good in him or her and in his information and trying to give him space to articulate the good about it, you know, very often I'm paraphrasing what he says, and try to paraphrase it in a way so that the good content is becoming clear. So that everybody sees, he's not only a pain in the ass, but he's also an important knowledge source. And so that is one thing. Another thing is to really, sometimes say "Okay, I got your point". And very often I use visualization and write down things, do symbolic work and say, "okay, you know, you said that already, um, why don't we stop the discussion or the talking about that? I got it. Let's listen to the other ones. If you do have a new point, come up with a new point". Or if it's two people interacting very hard, sometimes I say, I really explicitly say "you know, I think both of you are not getting along very well. So don't talk to each other, but talk to me, and then I will translate". So it's a whole bunch. I don't have the one way it's a whole bunch. I think what's in common is I always try to see the good and get that on to the surface.

Diana: I wanted to go through the characteristics needed for leaders to pursue strategic agile, so we can verify with you if it actually holds true. So, for agile strategy, the leaders or the decision-makers have to devote time to making a discovery. So it doesn't mean devote time to think about strategy, or what strategic options could be, but rather, they have to go outside and devote time for different experiences to see what could we apply then to their strategy.

Kerstin: Yep, correct. And that means that the decision is not... I think that's the hardest part for people from mankind to not decide, to leave it still open. And that's devoting time and also leaving the decision open for some time, that's very important and very hard.

Diana: Yeah, it's hard because something is in the backlog and they want to finish with it as soon as possible and don't have it in their mind. And then also interact with others. So again, not be in the inner circle with your teammates, but to go outside and see what maybe other industries do. So you can maybe imply it in your strategy. So think out of the box somehow.

Kerstin: Yeah, and especially in the agile strategic decision-making, you do the testing, then you do interact with partners, with customers, or people or companies that you do have a relationship to, and one thing is to interact. And the other thing, once again, like devoting time, what comes next or goes hand in hand with it, is to really consider seriously what they say. You know, sometimes it's like "the partner wants this and that, who cares?". They know what, what really is going on. And "the customers have no idea what they want". And so it's not you, who knows everything, but you really take into account what they say, and take it seriously, what they say.

Diana: Uh, huh, yeah, I see. Okay. Then, you see the lines in yellow, it just, I had two different codes. But in the end, I think it's the same thing. So sending future leaders to the periphery and make them distant from the center. So those decision-makers... Well, that's again, you're not only concentrated on the core of an organization, but you go to maybe IT team, talk to them, you go to administration, see what they think. And thus gather different kinds of information.

Kerstin: Mhm. And the special thing about it is, I mean, that would make sense also in strategic planning, especially when you come to the realization of strategic plans. Then you at the latest have to go to IT and ask them, "are we able to do that in one year or whatever". But in strategic agility, you do it too, before you decide, and that's explicitly the idea to do it before you decide. And that's the difference to strategic planning.

Diana: Yeah. Okay. Then, teaching people to think critically,

Kerstin: Yeah, critically, and really also, as I said before, to have another self-definition. You know, I still can think critically and have the impression that I am the one who knows, and that I have to be sure and that I have to know in advance and that I, you know, I'm the CEO. And that changes also, it's not only thinking critically but also be a little self-critical. Yeah, "I don't know yet and I don't have to".

Diana: Yes. scrutinize yourself. Maybe that's the word. Okay, then again here, I didn't put it in yellow. But probably that could also be the case. Make people have diverse experiences. Because I don't know, should I also highlight it as yellow? Because that's putting people distant from the center. So make them have different experiences.

Kerstin: No, one thing is really to be interested in more of the periphery. And another thing is to be curious about how something could be different from what I expected.

There's new information that I never thought about. So it's really diverse. Not only outside, but diverse.

Diana: These are all unique features for agile strategy, right?

Kerstin: You know, I think really good and really consequent strategic planning would also have a lot of those features, but they are not that explicit and not that common in strategic planning. It's really another paradigm, it's really more security, planning, centered, hierarchical, and the other one is more not knowing, trying. So I think good strategic planners should have a lot of that too. But normally they don't.

Diana: Okay. Then accepting ambiguity.

Kerstin: Yeah, and dealing with it. I mean, one thing is to accept it. Another thing is to...What do I make out of it?

Diana: So, leverage it?

Kerstin: Yeah.

Diana: Then combining firm's specification and overall generalization of the situation. So that might sound a bit strange. So the thing here is to be abstract enough, not to only focus on the situation of your firm, but somehow be simultaneously distant from it. But also, be contextually aware of your firm. So you know what I mean? Be both abstract and specified on the situation of your firm.

Kerstin: So it's more like, half a systemic view on the company and the whole system?

Diana: Mhm.

Kerstin: Yeah, I think that is, when you do have good strategic planning, that is given also. For me, it's not specific for agile. Because when you really do a good strategic analysis, you really have to know and see what's going on. Where's my company? Where is it now? Where could it be? Have scenarios. That's always like, zoom in, zoom out, zoom in and see the whole. Yeah, I think that's not specific.

Diana: Okay. Then seeing the system as a whole? Well, I think you just said right, that it's a given for both situations.

Kerstin: I think that 10 and 11 are a little similar. At least what I understand for 10, maybe I didn't understand it right.

Diana: When you actually explained to me what you mean, I would agree with you. So and 12, identify interdependencies within the system, I'd say that's also similar.

Kerstin: Maybe, you know, when I see now the whole bunch, 11, 12, 13, I think it's more or less the same. And I think it's not specific for agile. Yeah, it's also in strategic planning.

Diana: Then, conducting experiments.

Kerstin: Yeah. Very specific.

Diana: And first have shifting commitments and being able to de-commit from something on the middle, for example of your way. So you're not rigidly sticking to your assumption.

Kerstin: Very important.

Diana: Yeah. So I think having a conditional commitment also belongs to the group. And allocating resources flexibly. Finances, time... Basically all the resources.

Kerstin: I know that it's always the characteristic or seen as the characteristic for agile strategy. And in a way, it's, of course, it's true. But like, for example, in strategic planning, I always teach that 20% of your investment should be in insecure projects, testing, trying out something innovation. So that 20% you are also allocating the resources flexibly. What I experienced now is you don't do agile strategy-making all the time throughout the firm with every decision you do have. You only use it for decisions where you don't know exactly what to do because it really is a lot of work. It really takes a lot of time and really is not that easy. And strategic decisions where you know, okay, we pull out of that market, it's not sensemaking anymore. You don't have to do testing, you know what to do. Or when you say, okay, we penetrate the market, we have good experiences with additional quality standards. Then you don't have to do testing, it's the decision that you make. So the flexibility is only necessary for those decisions that are not sure yet or that you really have to test. And I think that is within the normal range in strategic planning. That's, you know, the 20% in strategic planning, where you also said, okay, we just try out, we do investments and see what comes out of that.

Diana: Okay, okay. Um, then having mutual responsibility for performance with the whole team and collective responsibility for decision outcomes. So it's not just one person who maybe was up for this decision, and then you blame him because he was the initiator, but it's the outcome of the whole group.

Kerstin: I see what you mean. And I think the more I get into the agile strategy-making... Like, you still do a SWOT and TOWS, or it still makes sense to do a SWOT and it tells them to have at least an idea of a strategic option. I think you'd still have the role of the decision-maker and the hypothesis owner. So I don't know if it's not an ideal picture that altogether makes a decision. I know the principles of Agile decision-making have collective and common and delegated decision-making, but I don't know if it's really that true. And if it can be realized. In reality, still, the situation that somebody has to decide and has to take responsibility. At least in organizational law, still, they don't care if you do have agile decision-making or not. Still, there is written that the board is responsible for the strategic direction of a company, and if they take wrong decisions, like VW and the fuel catastrophe disaster, it's still the responsibility is on the decision maker's side. So, I don't know if that point is... I know in theory, it is said. But I don't know if in reality it is done.

Diana: Okay. And it doesn't prevent the team from being successful, the agile team? They still can be agile, even though they can't yet have collective decisions?

Kerstin: I think so.

Diana: Okay. Then, that's a very specific one, seeing a career as a sequence of projects and experiences. So your career shouldn't be the step by step, ladder, but rather everything that you experience

Kerstin: That is a phenomenon that is really given and it doesn't have to do a lot with the strategy process. But now that we do have all the agile functions and jobs, the question is, you know, on the market side, we don't have a career biography that interacts with their activities. We don't have, you know, first, you become an agile coach, then you become an agile manager, then you become, it's like you do have people they do different things. What is the next career step when you are an agile coach? What's next? In traditional life, you do have Okay, first you are a team leader. Then you are a leader of a division, then you become a leader of a whole company. In the agile world, you don't have that. And that's really a big problem that we are facing now because the career of agile people can't be designed, defined. We don't have anything. So it is. In our days, it's, I was agile coach of CoOp /name/. And I was part of the decision or the whole project from bringing the company to the market. And so then that makes you more valuable than another agile coach. Besides that, you don't have anything.

Diana: Here it applies to leaders. So leaders of the company, who are not agile facilitators. Is it true that it's not important for them? If they are actually CEOs or strategic decision-makers, but rather, what's important for them is the experience they're having while making strategy. Or actually, it doesn't even have to do anything with the success of the strategic outcome?

Kerstin: I can't answer that. I don't know. Sorry.

Diana: Yeah, that was too specific.

Kerstin: I don't have enough experience with that. I don't know enough agile decision-makers and see how they develop and what that means in their strategy process. No idea.

Diana: Okay. Then knowing one's own strengths and weaknesses.

Kerstin: Yeah, but that should be in strategic planning also.

Diana: And knowing capability of taking risks.

Kerstin: Yeah. That should be given in strategic planning also. Of course, it becomes more... When you do testing, the risks of, like I said, realizing you are wrong, are becoming more explicit. And so, maybe this becomes more important. I think it's also given in strategic planning, but it becomes more up to date in agile strategy-making.

Diana: And giving oneself feedback, self-reflection sessions.

Kerstin: Yeah, well, also the same as before, it should also be part of the strategic planning, but of course, it becomes more important in agile strategy-making.

Diana: Then having various cognitive styles in the team you work with.

Kerstin: I would say yes, it is important. Like for example, I said the one who's always running forward and the other one who's a "Wait, wait, wait, what's given, what's given". But I think really, I think that is also in strategic planning. Yeah, maybe it's a little more important. I have different nuances in agile strategy-making. Other dimensions become more obvious. Maybe it's always the same. But now it becomes more obvious that one is very evidence-based, and the other one is very risk-averse.

Diana: Then staying focused during volatile times.

Kerstin: That is very important.

Diana: Is it applicable to strategic planning as well?

Kerstin: I think you don't have so many volatile times in strategic planning. You know what to do, you know what comes next. And you decide, even if you don't know exactly, but the decision is done. Let's move on. And in agile, because, at least if you take it really seriously, the evidence-based iteration principle, when you do have a lot of volatile times, and that is hard, that's like the what we said, leaving the decision open and finding out nobody wants the device for the corn analysis. You have this device, but nobody wants it. So what do you do? So this is more given in agile strategy-making.

Diana: And the last one, following new trends emerging in the environment?

Kerstin: I don't know if I would put it like following new trends. Testing the relevance of new trends.

Diana: Uh-huh. Okay. Okay, that was the last one. And I also have the ones which are applicable both for agility and planning. We can also verify that. So making discoveries and trying new things.

Kerstin: Yeah, also for strategic planning.

Diana: Okay, then understand the surroundings and then apply them to your strategy.

Kerstin: Yeah.

Diana: So producing something new by seeing new patterns in existing elements, that's actually just creative thinking.

Kerstin: Yeah. Also for both.

Diana: Having ambitions to be better.

Kerstin: Mhm.

Diana: Challenging this status quo.

Kerstin: Mhm.

Diana: Then considering new suggestions. However, now when I read this, I see a bit of contradiction, because we discussed the periphery in the unique features of agile, and actually, new suggestions come from outside of your team?

Kerstin: They also can come from inside of your team. And I think it's not contradictory. It's, I think it's more or less the same. Like we said before, you have to have closer look at the system and understand the system and your part in the system. And then you have to consider new suggestions. Which position to take for example in the system, or how to react and manage the system. I think it's not contradictory. It's more or less the same or at least linked.

Diana: Yeah I mean contradictory for me was the fact that this thing is both in unique features and in similar features. It's not unique actually.

Kerstin: That's what we just came upon with understanding the system, and that's also relevant for the strategic planning.

Diana: Right. And then not relying on personal emotions and on personal experience when making a decision.

Kerstin: Not only. I would put it not only relying on personal emotions. That's evidence-based, to be evidence-based. And it's I think in strategic agility it's more given. I wouldn't say it's unique but it's a lot more important because there you are really pushed into evidence-based decision-making. And in strategic planning, as I said sometimes you collect data, you still don't know exactly what will be realized. You know, will the government decide upon Internet companies, or business ecosystems, or energy supply in two years or in three years. You don't know but still, you do have some experiences, you have some feelings, so you make a decision. And in strategic agility, you try to find out, you try to have scenarios explicitly. So I think it's even more given, more important.

Diana: OK. Then catching nuances. That sounds something like we have already discussed.

Kerstin: Yeah I see that we talked about nuances but I don't remember. I don't know. I don't understand what catching nuances means here.

Diana: Yeah, that was also in the context of seeing the system as a whole and see yourself, the position of yourself in this system. And I was talking about contextual awareness like you have to be both abstract and specific for your organization. And here in this specificity, you have to catch the nuances.

Kerstin: I don't know what to say exactly. It makes some sense but the other ones were to me a lot more... I had an immediate reaction on that. With that, I'm lost.

Diana: Yeah but I just checked when I coded what was the context of that. Sorry I misled you. Actually hear it means identifying the challenges and identifying critical issues so here's the meaning of catching nuances sorry.

Kerstin: Yeah that's important for both.

Diana: OK and then workplace configurations. So here it means challenging existing roles of employees and giving them new tasks, defining new tasks for them.

Kerstin: Yep, important for both.

Diana: OK. Omitting the hierarchy and here you see selecting peers from the same organizational level, so here it means when you need to be checked, you do not necessarily have to be checked by the one who's above you, by your supervisor let's say, but it's also fine if your colleague who is on the same level can also check and verify something.

Kerstin: OK these are points... For me, they are not so much about... I don't know if they are so much about the strategic decision-making process and if they should be about the decision making process. It's nothing where I immediately have an idea or a picture or experience. I mean just in general to say you know just have Diana challenge your ideas, yes that makes sense but I don't know if it's meant that way and if it's that what this point refers to. So I'm not so sure if I get it right and if I can give a correct answer. So like for example when you are not having hierarchical control, selecting peers, I think in some strategic decision-making processes you do need hierarchical control. So I don't know if I can really go with that. I'm a little lost with that, I don't know what to say about it.

Diana: OK so yeah basically it's while making a decision for your strategy it's not always a matrix of people. One has to be kind of above and control the others at least sometimes?

Kerstin: For me sometimes yes, they do have to be hierarchical... I can't respond, I'm sorry.

Diana: Then having pressure mechanisms. So mild pressure, setting the pace, setting concrete short goals or something.

Kerstin: Yep, for both.

Diana: Then create flexible job tasks.

Kerstin: In the decision-making process or in afterwards, in realizing the strategy?

Diana: Well I'd say both but I don't know if I should be focused on the decision-making only.

Kerstin: I would. Otherwise, I think it becomes too general, too big. And in the decision-making process like the ones above, I have no experience with that, no picture, no idea about flexible job tasks in the decision-making process. I can't say anything about that.

Diana: It's fine. Then having reflection sessions, we discussed it, like giving the feedback. And also making decisions collectively. So it could be skipped I think. Then helping each other, sharing knowledge and expertise, and sharing advantages. To find the synergy between each other.

Kerstin: Yeah it's important for both. And at least in strategic planning, very often it's not realized. It's working against each other and trying to get your own advantage realized. So it should be done or should be realized but very often it's not.

Diana: OK. Seeing changes as strength.

Kerstin: OK what do you mean by changes? Which changes should be seen as a strength?

Diana: Well I think that could be linked to being fine with ambiguity. So when you are on your way to your goal, it's not just linear but there are some changes coming in, and it's good for you.

Kerstin: I don't know if I go with it. I don't know if I would say that you have to see it as a strength. Maybe as information or as a chance. It's like the hypotheses that are withdrawn, it's not a bad thing but it's interesting. So seeing changes as an information source or something interesting. I don't know if strength.

Diana: OK something that could be an advantage?

Kerstin: That has something good in it.

Diana: Yeah, OK. I see. Then making evidence-based decisions we discussed. Communicating vision, that's probably not applicable to the decision-making stage, right? Because that's already in the first steps.

Kerstin: Yeah, but still maybe it's not communicating but aligning your thoughts and your direction to the vision. You know it's where do you want to go, what is your big aim and how do the options that you are thinking about refer to the big vision. Do they or don't they? I think it's not communicating but aligning your decision-making to the vision.

Diana: And the last one is executing fast and being efficient. So not just understand things in theory but implement, execute them.

Kerstin: Yeah, I'm just thinking because in agile decision-making it's like we said before, sometimes it's not deciding so fast and putting it to action but trying, and iterating, and making it a little better. So if that still can be combined with executing fast, if it's still possible to go hand in hand, then yes I think it's for both. If not then I would say in the agile strategy-making it changes a little bit. For example, tests. The first tests that you do are created in like two hours. After two hours, you do a test with something. You know, this is my new computer for you. Try it out, push the button. And I don't have to create a computer and I don't have to work for weeks on a minimal viable product but just something. So yeah, for both.

8.4 Leadership Traits – Primary Data Coding

8.4.1 Unique Strategic Agility Traits

Unique Traits						
Trait	Cycle 1: Initial coding		Cycle 1: Magnitude Coding		Cycle 2: Pattern Coding	
	Code	Question	Code	Code	Code	Pattern
Devoting time		Unique?	Y -> N	Correct -> Good SP also has these features	Present in SP	
Interacting with others		Unique?	Y -> N	Yes -> Good SP also has these features	Present in SP	
Sending people to periphery / making people be distant from the center		Unique?	N	Makes sense in SP	Present in SP	
Teaching people how to think critically		Unique?	Y -> N	Critically -> Good SP also has these features	Present in SP	
Making people have diverse experience		Unique?	N	Good SP also has these features	Present in SP	
Accepting ambiguity	Plus dealing / leveraging	Unique?	Y	Yes	Only for SA	
Combining firm's specification and overall generalization of the situation / Seeing system as a whole / Identifying interdependencies within a system / Seeing evolution of system's actors / Seeing reconfiguration of system's actors		Unique?	N	Also in good SP	Present in SP	
Conducting experiments		Unique?	Y	Very specific	Only for SA	
Being able to de-commit from the initial decision / Shifting commitments / Having conditional commitments		Unique?	M	Very important	Only for SA	
Allocating resources flexibly		Unique?	N	Also in SP	Present in SP	
Having mutual responsibility for performance / Having collective responsibility for decisions outcomes	- role of decision-maker - role of hypothesis owner - collective decision - too ideal - might be false - might be unrealizable - board is responsible for decision-making	Unique?	?	Not practiced in reality	Not Applicable	
Seeing career as a sequence of projects and experiences	- not about strategy process - not enough experience	Unique?	?	Not in decision-making	Not Applicable	
Knowing one's own strengths and weaknesses		Unique?	N	Should be in SP	Present in SP	
Knowing one's own capability of taking risks		Unique?	N	Should be in SP	Present in SP	
Giving oneself feedback		Unique?	N	Should be in SP	Present in SP	
Having various cognitive styles at work		Unique?	N	Also in SP	Present in SP	
Staying focused during volatile times	- Leaders know what to do and what comes next - Decisions are made fast - It is taken more seriously in SA - It is more given in SA	Unique?	M	Not many volatile times in SP	Unsure	
Following new trends	Testing relevance of new trends	Unique?	?	Wrong formulation	Not Applicable	

Table 12. Unique Strategic Agility Leadership Traits Coding Process

8.4.2 Shared Strategic Agility & Strategic Planning Leadership Traits

Shared Traits					
Trait	Cycle 1: Initial Coding	Cycle 1: Magnitude Coding		Cycle 2: Pattern Coding	
	Code	Question	Code	Code	Pattern
Making discoveries / Trying new things		Shared?	Y	Also in SP	SP & SA
Understanding the surroundings and implying them to strategy		Shared?	Y	Yes	SP & SA
Producing something new by seeing new patterns in existing elements		Shared?	Y	For both	SP & SA
Having ambitions to be better		Shared?	Y	Yes	SP & SA
Challenging the status quo		Shared?	Y	Yes	SP & SA
Considering new suggestions		Shared?	Y	Relevant for SP	SP & SA
Not relying on personal emotions	- "not only" - not unique for SA - more important for SA - evidence-based is more needed for SA - people have more experience in SP	Shared?	M	More given in SA	Unsure
Not relying on personal experience		Shared?	M	More given in SA	Unsure
Catching nuances		Shared?	Y	Important for both	SP & SA
Having workplace configurations		Shared?	Y	Important for both	SP & SA
Selecting peers from the same organizational level / Not having hierarchical control	- not about decision-making process - hierarchy is needed in some cases	Shared?	?	Not for decision-making	Not applicable
Having pressure mechanisms		Shared?	Y	For both	SP & SA
Creating flexible job tasks	no experience	Shared?	?	No comment	Not applicable
Having reflection sessions		Shared?	Y	Discussed	SP & SA
Making decisions collectively		Shared?	Y	Discussed	SP & SA
Helping each other / Sharing advantages / Sharing knowledge and expertise / Understanding knowledge and expertise of others		Shared?	Y	Important for both	SP & SA
Seeing changes as strength	rather a source of information	Shared?	?	Wrong formulation	Not applicable
Making evidence-based decisions		Shared?	Y	Discussed	SP & SA
Communicating vision	aligning thoughts and direction with the vision	Shared?	?	Wrong formulation	Not applicable
Executing fast / Being efficient		Shared?	Y	For both	SP & SA

Table 13. Shared Strategic Agility & Strategic Planning Leadership Traits Coding Process

8.5 Facilitation Characteristics Coding

	Magnitude Coding	In Vivo Coding	Descriptive Coding	Theming the Data
Qualities	Code	Codes	Codes	Themes
willing to help others	D	- very different and very special - help them define hypotheses and tests - especially tests and outcomes that are insecure - I experienced that with top management - to be brave enough - they all had problems - it was helping to tell them - it is better than spending money - exposing top management insecurity - one of the biggest challenges - the biggest help you need in agile strategy-making	- having workshops - tests avoiding - unwillingness of top management	"Distinct" means: in strategic agility, the needed help is clearly formulated and identified
follow the interests of the clients while putting own interests and ego aside	S	- always the case - I thought I knew what to do - you have to let it go - they know better than me - no difference	own bias realization	"Same" means: there is no difference between strategic planning and strategic agility, the quality is always the case for both settings
excellent communication skills	S	- the same		"Same" means: no difference between SP and SA
be both empathetic and authoritative	D	- important for both ways - you are supposed to not manipulate - not intervene - I think that's wrong - sometimes you have to intervene - it's necessary for both situations - the balance is harder in agile	- teachings of facilitating school - balance struggle explanation	"Distinct" means: it is more difficult to be equally empathetic and authoritative in agile settings
be fair and honest with everyone	D	- challenge in both situations - gets harder when I'm not familiar with the process - little bit harder in agile strategy-making	- ability to see teams' dynamics - insecurity switches focus	"Distinct" means: it is more difficult to have such quality when one has to concentrate more on other things
be self-disciplined, logical, and consistent	D	- if you're not familiar, it gets hard - when it's normal strategy process, I can do it half asleep - a lot of unknown situations	- differences between processes - difficulties of strategic agility facilitation	"Distinct" means: it is more difficult to be logical, etc. when one is not sure what to do next
Competencies	Code	Codes	Codes	Themes
help those responsible for strategy-making to understand the importance of collective decision-making	N	- you can't say that in general - it depends on a company	- dependence variables - traditional vs non-traditional cultures	"Not applicable" means: one cannot generalize such a competency
create such a setting where everyone feels encouraged to express his or her thoughts and ideas	S	the same importance		"Same" means: equally important in both settings
be able to make the group understand and accept everything that is given or communicated by the facilitator	D	- important in both situations - facilitator has to be a chief of the process - it becomes harder - I don't know myself yet	- authority of a facilitator - difficulties with convincing people	"Distinct" means: it is harder to have this competency due to insecurity in the process
fully understand the organizational issues of the client	S	- important in both settings - you never fully understand it	doubts in facilitators' capabilities	"Same" means: it is important for both SA and SP
have experience in conducting strategic planning (agility) workshops	S	- I am very relaxed and experienced (SP) - I am not experienced (SA) - I don't know how to conduct them - that would be helpful	- workshop description - workshop outcomes - facilitator's struggles	"Same" means: this competency is also helpful in strategic agility setting
be able to apply theoretical concepts	S	- important in both settings - additional topics and concepts are necessary - agile theory is helpful - taking into account information	experience with need for additional theory	"Same" means: additional theory is also important in strategic agility facilitation
Functions	Code	Codes	Codes	Themes
guide the group members through the course of steps defined in advance to achieve the result which is created collectively and accepted by everybody	D	- maybe even more important - the group relies on you - in agile, nobody is very experienced - everybody is a little insecure - you have to tell them	- teams blindly follow facilitators - companies are experienced in SP	"Distinct" means: the function is more important in strategic agility
motivate the group members (and convince the reluctant ones) to take part in the strategic planning discussions and keep them enthusiastic	D	- not so much to take part in the discussion - take part in shifting values - rejected hypothesis as a source of information	how paradigms are shifted	"Distinct" means: motivation is directed at different activities
stimulate the thinking of the group members	S	both		"Same" means: applies to both settings
recognize the tendency of the group members to be unrealistic (too optimistic or too pessimistic) about the future and prevent them from this tendency by challenging their assumptions and expectations	D	- deeper than optimistic and pessimistic - recognize what information you have - which information would you like or need to have	what teams need to be aware of	"Distinct" means: the function has a more detailed meaning
ensure that a group came to a consensus rather than a compromise	D	- more important in strategic planning - in agile, you do small iterations - let's try that way - you can shift again - taking little steps	consensus is less significant	"Distinct" means: the function is less important in strategic agility
ask questions and summarize the data	S	applicable to both		"Same" means: the function is applicable to both settings
analyze the collected information and present it to others with clarifications	D	- typical task for expert consulting (SP) - it's not me, it's test teams (SA) - that's important and fragile step - you get a lot more information - aware of the strategic impact of the information	- not for process consulting (SP) - test teams present to decision-makers (SA)	"Not applicable" means: facilitator does not present such function in SA
enable the group to stop having circular discussions	S	the same		"Same" means: the function has equal importance in both settings
smoothly manage the resistance to changes associated with strategic planning	N	- I think it's relevant but I don't know - I can't tell yet - I am not secure	Expert's hypotheses	"Not applicable" means: the expert is not sure yet if she can comment on this function
spot and handle conflicts within the group	S	yes		"Same" means: the function has equal importance in both settings

Table 14. Facilitation Characteristics Coding Process

Miscellaneous information	In Vivo Codes	Descriptive Codes	Focused Coding Category
"applying theory in strategic agility"	- I could use a theory - I'm searching desperately	- three dimensions of facilitation - different combination of dimensions in agile - content dimension in SA - team dynamic dimension in SA - process dimension in SA	Need for theory for new combination of dimensions
"leaders' enthusiasm about strategic agility"	- the CEO wasn't enthusiastic at all - we just do it, we just try it - both roles are given - balance is taking place - reflective type of people is enthusiastic	- workshop experience - difficulties with CEOs - two types of people in teams - wrong expectations about agile methods	Agile decision-making provokes various feelings (not only enthusiasm)
"making teams be aware of the information they need to know"	- it has a bigger priority in agile - you iterate and you want to find out something - the information basis is often not valid - you still don't know	- agile is about making evidence-based decisions - reasons for doing agile - decision-making in strategic planning	Evidence-based decision making is more important in strategic agility
"strategic agility roles"	- three roles - information is structured in strategic way	- roles defined - presentation of information	Strategic agility team members present information themselves
"conflict management"	- intuitively - trying to see the good - paraphrasing - I don't have one way - I always try to see the good and get it onto surface	- presenting problematic participants in a different angle - stopping the discussion - intervening into the dialogue	Managing the conflict has multiple ways

Table 15. Miscellaneous Information about Facilitation Coding Process

8.6 Interview Transcript – Cases-Examples

Interviewee – Kerstin Pichel, Professional Strategy Facilitator; Interviews dates – 14.07.21 & 22.07.2021

Case 1: Help with hypothesis definition and testing

What you see is the company developing surgical instruments has the idea for a new strategic option. That's mobile sterilization. So the operational equipment that they do sell, the idea is to come to rent it and to sterilize it for the customers with a mobile car or some kind of sterilization equipment.

And you do have here the arenas where they want to use this strategic option or the strategic idea. So the offerings: they want to offer mobile sterilization and the more concrete idea it's to have a bigger set of equipment and also consider if they just offer something you know you rent it once and then you just throw it away. There are also the customers, the geographical areas where they are, the main competencies.

And H1, H2, these are the hypothesis and the main competence is the know-how about the instruments. But also now they have to know about which diversification of the instruments is necessary. So these are just very specific know-how setups like individually of the instruments, and they sometimes produce them specifically just for one doctor so that he uses his little longer or little thicker instruments.

Then you do have here also the value chain steps inside the companies, what do they do themselves and what is done by other partners, other companies. They do themselves the logistics, the reparation, the coding of the equipment and sterilization. And then they think to do something with this mobile sterilization to have a more optimized combination of instruments. They do have like a setup for instruments, you get one set or another set, you combine them yourself and they think that they could do good by really optimizing those sets of instruments.

Then you do have the methods of the company development and you do see that they use real organic growth, also joint ventures, cooperation, merger and acquisition, they use everything.

You do have the differentiation compared to other companies. Also there they have a lot of differentiators that they use, like the price, the product quality, the customer

orientation, image. But they really try to differentiate with a lot of aspects. The economical logic: they do have also there a combination of low costs and high prices. They try to get along with that combination. And three and four I think this is written by... I don't remember quite well but I think it was written by Ulrich himself. This is not really economic logic, you can skip that.

And then strategic time aspects like what has to be done very quickly and developed very quickly and there are specific strategic sequences. I just realized this is not me who wrote this. This for example is not a very hands-on definition, it's not a strategic definition. OK, never mind. This is the setup more or less of the company developing surgical instruments. So you do have the strategic positioning of this company and the idea of having a new offering with mobile sterilization and what should be tested with it.

What we did then is...you see we started or we tried to define the hypothesis and we started with defining hypothesis for the mobile sterilization and then we thought “no it's more the set of equipment that they rented not hospitals but to one-day ambulatories where you go and you have surgery and you go home afterwards”. So that was the first thing that changed.

When we talked about the strategic hypothesis we realized that it's probably not so much the focus on the mobile sterilization but it's more the focus on the set of equipment. So that was the first moment when we realized, talking about the hypothesis and the tests, that actually it is another offering that is more sense-making, it's more interesting to them.

In the diamond shown before, the red one is about mobile sterilization and the green one is about the set of equipment that is rented.

For some of the strategic elements, they had enough information. That was not something that they needed to be tested. So for example, the one-day ambulatories where you just go and go out afterwards that they are interesting for the renting sets. That was something where they thought “you know we don't have to test that. We know that already. We got feedback from them already. And then for example you do have hypotheses 7 to 11, what should we do ourselves and what should be given outside and you see over here, for example, is “the company developing surgical instruments is capable to offer to the ambulatories...” and then we started with “always”, you know 24/7. And then we realized “No, that's unrealistic. The hypnosis has to be maybe two times a week and not 24/7”. And then you see another hypothesis is that the sets could be tracked. They have a special

tracking system like the sensor in the instruments and then they realized “No with the renting sets this is not sense-making, it's not necessary”.

And you see here is when you think about the internal steps that you realize. One thing is what you really can offer and another thing is to be aware of the hypothesis, about the process inside your company. For example, we realized “What happens if the staff of the company developing surgical instruments gets sick or is on vacation. Can you still offer?”. That's why we finally said we decided now it's not 24/7, it's unrealistic. Maybe two times a week because we have to make sure that we really can guarantee delivery of equipment of 99% when needed.

And what becomes clear with this example is that when you get into defining what is your hypothesis behind an offering, what do you consider as possible or necessary, you really get deep into the processes, the necessities, the needs of the customers and it's linked to each other and sometimes it becomes quite big. Like for example, only the one strategic element over here of the value steps has five different hypotheses in the background. And OK we skipped two but still, that was a process that was... We discussed these hypotheses for I think at least three hours.

There was just one person from the board that I discussed with and one thing was to make him willing to really think in this complex combination of what is necessary and has to be done to have this offering. And another thing is to, for me as a facilitator, to choose to still have an overview of all the different contents of the hypothesis that are relevant and should be considered and to continuously ask him “OK, so what about this stuff? If you think about this stuff, what about the costs? When is it really economically sensemaking for you?”

This is one example to explain what I mean when I say that challenge for agile facilitators is to define a hypothesis and a more detailed thesis, and the right level of abstraction, and it can be tested. So it's really a complex construct of hypothesis combinations.

And then maybe I can add also to the idea of testing. What we found then is it's not that easy to really test it. How do you test for example “what do we do with the if stuff gets sick or some vacation”? This is something that you can't really test.

First of all, you have to write down which hypotheses are in the background of an offering. Then you have to find out which of these hypotheses is the most important ones.

And then finally you have to think about... “are there even more detailed sub-pieces that go along with it?”.

For example, here it starts already “we need so many people in section ABC in our company to really guarantee a 99%”, and this is already a more detailed sub-pieces of “we are able capable to offer always the needed equipment”. This is like trying to find the level... which details of the thesis can you really test or can you really find information about, and then you have to define do you need tests or can you just for example by pulling together all the information or the experiences you have so far, maybe even do research where can you get answers for these more detailed theses.

Sometimes you probably say “these ambulatories, for them it's very important to have new instruments and only then they will be willing to pay extra”. And this is something you won't find anywhere, you can't do research about it, you don't have any experience with it. This is something that you have to test.

This is one example for... you don't sit down and you say “OK write down your hypothesis, and your thesis, and your tests, and then we are done in half an hour and that's fine” but it's also a process that is difficult. It's complex, it needs a lot of thinking, it needs a lot of patience from everybody. It's like you always swing around a little bit and then little by little you realize what are the main hypotheses that you really can test and have to test. And a lot of thinking and discussion is needed to get to that point.

And the top management team, they have never done that. You know, if I wouldn't have made them think, they would have given up after half an hour I think.

That is something that scares or annoys people to really think about all that stuff and it's so complex and it's very exhausting. “Do we really have to think about that or do we really have to talk about all that? Can't we just do it”.

Case 2: Intervention into the discussion process

That's an example of a workshop I had with the top management team of the IT marketing company. That workshop was really difficult, a real disaster.

We thought about defining and coming along with ideas for testing the hypothesis to develop a new IT platform for Swiss design products. That was their idea to have a new offering.

Then we had this workshop about what has to be tested, and I made them write down what will be the five elements of this strategic option, what would change, and what is the hypothesis behind it. They came up with some hypotheses, and I tried to find out with them, to prioritize the hypothesis which is the most important to be tested. So when you have the time and you have the surplus of information, which are the nearest and the mostly sensemaking or useful ones. And you see the whole workshop ended up... this is all empty, this is all empty, this is all empty. It was just really a disaster.

There was the top management team, three board members and then there was another consultant. And the CEO actually and the founder of the whole company, he really had problems to get into this strategic thinking and complex considering of different theses. I could not make him think about hypotheses and testing. For example, I asked him “OK, so a platform for Swiss design products. For whom is this platform? Who would be your customer?”. “We don't know yet”. I said “OK, you know that would make sense to think about what do you have in mind. I'm sure you do have a hypothesis. Is it rich people all over the world? Is it Swiss people? Is it just youngsters? Is it old people? I think it makes a difference to your platform and it makes a difference to what you will start working on”.

I mean to build up a platform like this costs a lot of money (I think they talked about 500,000) and a lot of time, and then you finally find out “we should have done that for rich Brazilian top shots and not for every day Swiss youngsters”. You know until the end, he was like “uh you know I don't want to get into persona discussion right now, this is not the point to talk about personas”.

This idea of manipulating him or motivating him, or motivating the whole board to get into this discussion went completely wrong or didn't work out at all. But it would have been necessary because otherwise, they would not start to think that way and to work in that way. Also from an economical point of view, they would now invest a lot of money and maybe fail. So I think it would have been a great surplus and idea to talk them into “let's try and make it happen” but I could not.

In strategic planning, it's the same. You do have the same problems, and maybe here the content of the problem is different. The necessity to guide, to say “OK, let's have a closer look on that now. I know you don't want to but please let's have it. I just facilitate you now into digging deeper”. That is necessary also in strategic planning.

Case 3: Difficulties with convincing people

That was an example of the workshop for the media architectures studio. They came up with the idea to build a robot.

We had a workshop with the top management team and I wanted them to think about different personas first. You know like for example the ones working in the museum or directing museum. I also had two personas who are visiting the museum.

And I wanted the top management team to think themselves, to be one of these personas and what kinds of necessities they have about this robot. Which hints they would give to find out about necessities. And I met them here in my room, I pretended I was the robot and I took them with me and showed them all my art and they could direct me. We really simulated for seven minutes or something as a museum director or as a visitor to use this robot.

And it just didn't work out. Talking about the indicators, “what do I show? How would you know that I am for example this kind of demographic person? That I do have this kind of interests?”. For example, they had the hypothesis that people would like to visit the museum from home. So which indicators could I show that I prefer to be at home and not in the museum or which indicators could I show that I don't like to get in contact that much or that easy with people? When you have this robot simulation, you realize “now is the moment where I showed that I don't get in contact easy” or “now is a moment where I could say I would like rather be at home”. This thinking about what can you measure, what can you see, what could be the hints that you in the final testing should really have in mind, that didn't work out at all. They were completely stressed out.

That was an example where we did something, and then I skipped it completely and I said “OK, forget about it. We think about what's the more detailed thesis that you have and what did you find out during the simulation about it, and how could you test it. I just skipped the first thing and came up with a second step.

I realized this was too complicated. I didn't know if it was really that important for the whole workshop. I think for finally really doing testing and analyzing the test information that becomes very important but for the next step of the workshop defining the more detailed thesis and defining possibilities to test it, was not very important. It was like a warm-up and we were really very fast into the topic and had some experiences ourselves

so that was helpful but these indicators... too much, too complicated. I realized “OK, during a workshop I have to do it differently”. For example, I thought I could use some people watching the other ones interacting and then say “OK, there was a point, there was a point, there I could ask a question”.

I'm not that experienced yet and I don't know what works out and what does not.

Case 4: Changing teams' mindset

The example from the workshop with the media architectures studio - what was very interesting they already arranged the testing with the Museum of communication in Bern. They really were working on robots for the Museum of communication in Bern but they had no idea - when we came up with “what are your theses and how would you use those robots in Bern in this museum to test? What do you want to test? They had really like “We'll just put them in there and we'll see what we find out and what experiences we do make”. And then we really had to talk them into “OK, think about it a little more in detail. For example, there are always guards in the museum, give those guards a list to check how many visitors the robot can interact with. You as a museum visitor from at home can talk to the robot and make the robot go to somebody who really is in the museum as a visitor and talk to the real visitor. So, give them a list and see... For example, they should check how many times did the robot go to somebody and how many times did this person go away or really interact. Or how many people did walk away when they see the robot come so there was not even an interaction possible, and so on. And so just make it for one month. Make the guards note what they see, what they count, what they experience. And also for example have numbers, have them collect numbers. How many additional visitors did use the robot from at home? How many of these visitors did not go to the museum before but came additionally now that the robot was there or made them made it possible that they were visiting the museum from at home?”.

If you don't collect that data and these indicators you won't be able to really analyze the test. They were always only “Does the robot work? Does it function? Can you move the robot from one room to the other?”. Only technical testing but not strategic testing. One thing over here was... they were not used to strategic testing and another thing was they were really “So what do we do if they say nobody talks to them?”. Well, then your robot might not be so sensemaking. And you know, building a robot costs them a million. So before you build the robot just have something like a minimal viable product. You know,

just a little box shifting around. I don't know, anything. But they were so scared of... “What if we find out that it doesn't work?”. Well, thank God, you saved one million!

So that was an example of the difficulty to come up with testing and find out about not working out tests.

Case 5: Necessity of knowing additional theory

Either with the media architectures studio or IT marketing company...I realized - I'm stuck, we are stuck. We don't know how to derive those strategic hypotheses from all that they do have in mind. Because I had this one set up and one outline of workshop and I realized - it doesn't work, I don't know what to do. And then I was hysterically looking or searching in my head, what I have in my backpack, what could help. I mean you come across one trouble in the workshop, one problem, and you are not prepared, you don't have anything that tells you “yes typically it's difficult to do this or that and deal with it like that”. And so I just you know very quickly I had to think what is the problem now, why don't they listen, why are they not able to find a common definition of hypothesis about the customers, or the five elements. And then the only thing that came to my mind immediately was theory U. I was working with that already.

So that may be one example for “you are out there all alone, not knowing, you have to take out of your backpack whatever you have”. And I think maybe that's also the situation in other facilitations if you're not used to it. But here in agile strategy-making it's the combination of “I'm not used to it” and “there's nothing that tells you what happens” or like “a concept or theory, what the problem is or could occur”. And then this combination is challenging and you just have to immediately quickly find another theory that fits, that helps.

Case 6.1 Reliance of teams on facilitators

That's from a software company and also from insurance company. It was not a workshop but like the hypothesis owner was defining together with me hypothesis and the hypothesis canvas. We started and then they were going on their own. And so one or two days later we met again and we were talking about their experiences. And they had these canvas and they were just desperate because what they were writing did not fit into the canvas. It was too much. And I thought well then change the canvas or do something else. I mean you don't have to stick. But they were so relying on it. “OK, this is the tool and it

has to fit in there, and we have to work with this tool”. They were not daring to change anything. And that was one teeny tiny example of how insecure they were about what to do and what to use.

Case 6.2 Reliance of teams on facilitators

It all has to do with the canvas. I do have like one canvas to define the hypothesis and the testing, you know like the planning canvas. And then one canvas to note, while you are testing, what you see, what you experience. It's like just a note board for you. And then there's another canvas to analyze the outcome of the testing and another one to analyze the outcome of the whole hypothesis, so what did you derive from it.

And they were sticking up firmly to keep these canvases, although for them they were not helpful and they didn't dare to change it, to modify it. And then when we talked about it I told them “hey, just you know it's a tool. Change it if it's not helpful”. And one finally did and he changed a lot of these canvases but it was only after I told him. So for me, that was also an example of how insecure they were. And really not knowing what do they have to do with all this later and how does it go on, and maybe they need it and then they don't have it. The whole process was new for them. It's like when you are told to use a medical device and you have no clue then, of course, you do exactly what they write down although maybe after using it five times you think “OK I skip that one and skip that one”.

Case 7. Making teams aware of the information they need to know

I think we take the company developing surgical instruments once again. A very different content. They had an idea and we were working on it with an agile way to build up a new daughter company in Spain. So they had quite a big project going on in Spain and when I talked to the project owner I thought he was very optimistic – “you know we have so many people already applying and in Spain and they're very interested, and I do have very good contacts, and I did talk to universities already” - blah blah blah. And then I thought I don't know what they want these people in Spain for, and why, and if it works out. To me, it was a little “Yay, everything is fine in Spain”.

And then I was just sitting there and asking “what’s your hypothesis about Spain? what do you want to achieve with Spain?”. And then he tells me “OK, we want to achieve like relief from too much work. The standard work we want to give to Spain, and then we do have time here in Switzerland to concentrate and focus on the development of new

customers, new products”. And then I said “OK, and what are the more detailed these behind “they will relieve you from work”?”. And he started “OK we'll find very talented people blah blah blah blah” –“OK and what else?” –“Yeah, nothing”. And then I said “When you think about the process, how does the process work from delegating work to Spain?”. –“OK yeah, so we find out about standardized tasks”.

I made him think. OK, this is one hypothesis that you were able to find - standardized parts. OK and then the 2nd, and then you know little by little we came to the point OK the second more detailed thesis that people here are willing to give standardized tasks to Spain. Another hypothesis is that people in Spain are willing to just work on standardized tasks and do it in a qualitative reliable way and that the communication doesn't work out, and so on and so on.

So by really making him aware of what is behind his “Yay, we have new people in Spain” we came up with a list of 18 sub-theses that are necessary for this whole Spain story to work out. And he thought “oh that's right. Maybe it's not just finding people”. I didn't have to do anything, I didn't have to say “hey think about it twice”. It was really by leading him through these sub-thesis questions. He came to the point himself.

Case 8. Consensus over compromise

That would be the example of the company developing surgical instruments and also with the software company. There, especially for surgical instruments company, that was striking for me. I had a workshop with the whole top management team and we were talking about which options they had, which options they consider very interesting and why. And so the one, CEO I think, he was very into one of the options - renting or serialization - and normally, we would have a discussion “OK does it really make sense, which information it has..”. And in that case, we just had to define OK which is the hypothesis, how do you test it and then we'll see what is the result. And we don't have to discuss now and get angry or have to convince each other because we'll see what the tests show.

It was always the CEO who was very pushy and fast-moving. And once he had new ideas, e.g. somebody in the hospital tells him “you know we need a needle that has a bigger opening to put the thread”, and then he comes back and says that we have to produce a new needle, and we have to find a new needle and let's go... And the project manager, he's part of the top management team, he told me now it's so easy because it's not always

that he comes back and “let's go” but it's he comes back and we say “OK let's test”. And for him, he says it's very relieving because they don't invest immediately so much money in just a rough idea that nobody tested and then they find out “huh sorry we should have not spent the money then because it's not worth it”. And during a discussion with this CEO, it was always very hard to make him see “maybe it's not that sensemaking” because he was so convinced and he was so strong and so charismatic that he always talked everybody into his idea. And now with this testing, the project manager told me, they do have a tool to calm him down and say let's see if it really works out.

Case 9: Testing Teams Presenting Information

The insurance company had the spin-off about the mobility service and they had a lot of discussions and interactions with customers and partners, and they had for example interaction with the railway company, and during this discussion, the railway company told them “you know, we are not that interested in your mobility stuff. But you have already a lot of experience with building up business ecosystems, we see that in your mobility spinoff, you did build up a little business ecosystem, and you're able to manage it. And that is very important for us”. And the one who was talking to the railway company, he told me about this feedback. And but, you know, presenting his testing experiences to the top management team, there was no slot or no possibility to talk about this additional information. It was just about what does the railway company want? Like for pricing and products? And, yeah, all this detailed business model information stuff. And I think, for the whole insurance company group, it would have been strategically important to hear and to understand, “aha, business ecosystem capacity or ability is something that we can sell on the market. It's not so much mobility, but it's a business ecosystem, ability and competency”. And I think when you do testing, you get a lot more information than just point ABC and to be able to present, to be aware yourself of the strategic impact of that information to present it. And then to clarify it, that is becoming even more important.

8.7 Cases-Examples Coding

Case ID	Coding Cycles		Theme
	Cycle 1	Cycle 2	
	Coding Type: Code		
1	Descriptive: New strategic option – mobile sterilization	Pattern: Strategic option	Strategic Agility process
1	Descriptive: Idea explanation	Pattern: Strategic option	
1	Descriptive: Arenas	Pattern: Strategic Elements	
1	Descriptive: Vehicles	Pattern: Strategic Elements	
1	Descriptive: Differentiators	Pattern: Strategic Elements	
1	Descriptive: Wrong economic logic	Pattern: Strategic Elements	
1	Descriptive: Wrong staging	Pattern: Strategic Elements	
1	Descriptive: Hypothesis definition	Pattern: Workshop process	
1	Descriptive: strategic option change	Pattern: Workshop process	
1	Descriptive: Strategic elements content explanation	Pattern: Strategic elements	
1	Descriptive: partial availability of information	Pattern: Workshop process	
1	Descriptive: hypothesis modification	Pattern: Workshop process	
1	Descriptive: necessity to go deep	Pattern: Workshop process	
1	Descriptive: Multitude of hypotheses	Pattern: Workshop process	
1	Descriptive: Prioritizing hypotheses	Pattern: Workshop process	
1	Descriptive: Hypothesis detailization	Pattern: Workshop process	
1	Descriptive: Hypotheses proving	Pattern: Workshop process	
1	Descriptive: Hypotheses testing	Pattern: Workshop process	Facilitator's challenges
1	In Vivo: Thing that changed	Pattern: Challenge	
1	In Vivo: Another offering	Pattern: Challenge	
1	In Vivo: That's unrealistic	Pattern: Challenge	
1	In Vivo: This is not sense-making	Pattern: Challenge	
1	In Vivo: another thing is to be aware of the hypothesis	Pattern: Challenge	
1	In Vivo: defining your hypothesis becomes quite big	Pattern: Challenge	
1	In Vivo: five different hypotheses in the background	Pattern: Challenge	
1	In Vivo: discussed for at least three hours	Pattern: Challenge	
1	In Vivo: make him willing to think	Pattern: Challenge	
1	In Vivo: have an overview of all the contents	Pattern: Challenge	
1	In Vivo: continuously ask	Pattern: Challenge	
1	In Vivo: complex construct of hypothesis combinations	Pattern: Challenge	
1	In Vivo: Not that easy to test	Pattern: Challenge	
1	In Vivo: you don't sit down and say	Pattern: Challenge	
1	In Vivo: process is difficult	Pattern: Challenge	
1	In Vivo: Thing that changed	Pattern: Challenge	
1	In Vivo: It's complex	Pattern: Challenge	
1	In Vivo: needs a lot of thinking	Pattern: Challenge	
1	In Vivo: Needs a lot of patience	Pattern: Challenge	
1	In Vivo: Discussion is needed	Pattern: Challenge	
1	In Vivo: would have given up	Pattern: Challenge	
1	In Vivo: scares or annoys people	Pattern: Challenge	
1	In Vivo: it's very exhausting	Pattern: Challenge	
2	Descriptive: Hypothesis definition and testing	Pattern: Workshop process	Strategic Agility Process
2	Descriptive: New strategic option	Pattern: Strategic option	
2	Descriptive: Strategic elements modification	Pattern: Workshop process	
2	Descriptive: Hypothesis prioritization	Pattern: Workshop process	

2	Descriptive: Workshop participants	Pattern: Workshop process	Facilitator's Challenges
2	Descriptive: Users identification	Pattern: Workshop process	
2	Descriptive: necessity of hypothesis definition	Pattern: Challenge	
2	Descriptive: importance of guidance	Pattern: Challenge	
2	In Vivo: really difficult, a real disaster	Pattern: Challenge	
2	In Vivo: this is all empty	Pattern: Challenge	
2	In Vivo: CEO had problems	Pattern: Challenge	
2	In Vivo: I could not make him think	Pattern: Challenge	
2	In Vivo: makes sense to think	Pattern: Workshop process	Strategic Agility Process
2	In Vivo: makes a difference	Pattern: Workshop process	
2	In Vivo: costs a lot of money	Pattern: Challenge	Facilitator's Challenges
2	In Vivo: we should have done	Pattern: Challenge	
2	In Vivo: I don't want to get into discussion	Pattern: Challenge	
2	In Vivo: didn't work out	Pattern: Challenge	
2	In Vivo: would have been necessary	Pattern: Challenge	
2	In Vivo: maybe fail	Pattern: Challenge	
2	In Vivo: great idea	Pattern: Contribution	Strategic Agility Process
2	In Vivo: digging deeper	Pattern: Contribution	
3	Descriptive: New strategic option	Pattern: Strategic option	Strategic Aility Process
3	Descriptive: workshop participants	Pattern: Workshop process	
3	Descriptive: identifying personas	Pattern: Workshop process	
3	Descriptive: deriving information	Pattern: Workshop process	
3	Descriptive: simulation process	Pattern: Workshop process	
3	Descriptive: simulation duration	Pattern: Workshop process	
3	Descriptive: persona indicators	Pattern: Workshop process	
3	Descriptive: building hypotheses	Pattern: Workshop process	
3	Descriptive: search for indicators	Pattern: Workshop process	
3	Descriptive : Simulation outcomes	Pattern: Workshop process	
3	Descriptive : Hypothesis detailization and testing	Pattern: Workshop process	
3	Descriptive : timing for indicators definition	Pattern: Workshop process	
3	In Vivo: didn't work out	Pattern: Challenge	
3	In Vivo: which indicators could I show	Pattern: Challenge	
3	In Vivo: stressed out	Pattern: Challenge	
3	In Vivo: skipped it completely	Pattern: Challenge	
3	In Vivo: forget about it	Pattern: Challenge	
3	In Vivo: too complicated	Pattern: Challenge	
3	In Vivo: if it was really that important	Pattern: Challenge	
3	In Vivo: It was like a warm-up	Pattern: Challenge	
3	In Vivo: I have to do it differently	Pattern: Challenge	
3	In Vivo: I'm not that experienced	Pattern: Challenge	
3	In Vivo: I don't know what works out	Pattern: Challenge	
4	Descriptive: testing arrangement	Pattern: Workshop process	Strategic Agility Process
4	Descriptive: absence of testing ideas	Pattern: Challenge	Facilitator's Challenges
4	Descriptive: indicators identification	Pattern: Workshop process	Strategic Agility Process
4	Descriptive: importance of having indicators	Pattern: Workshop process	
4	Descriptive: absence of strategic testing	Pattern: Challenge	Facilitator's Challenges
4	Descriptive: fear of testing failure	Pattern: Challenge	
4	Descriptive: importance of having MVP	Pattern: Workshop process	Strategic Agility Process

4	In Vivo: they had no idea	Pattern: Challenge	Facilitator's Challenges
4	In Vivo: we'll just put them	Pattern: Challenge	
4	In Vivo: we really had to talk them into	Pattern: Challenge	
4	In Vivo: won't be able to really analyze the test	Pattern: Challenge	
4	In Vivo: only technical testing	Pattern: Challenge	
4	In Vivo: not used to strategic testing	Pattern: Challenge	
4	In Vivo: might not be so sensemaking	Pattern: Challenge	
4	In Vivo: they were so scared	Pattern: Challenge	
5	Descriptive: formulating hypotheses	Pattern: Workshop process	Strategic Agility Process
5	Descriptive: looking for new concepts	Pattern: Challenge	Facilitator's Challenges
5	Descriptive: searching alternative solutions	Pattern: Challenge	
5	Descriptive: special combination in strategic agility	Pattern: Challenge	
5	In Vivo: I'm stuck, we're stuck	Pattern: Challenge	Facilitator's Challenges
5	In Vivo: We don't know how to derive hypotheses	Pattern: Challenge	
5	In Vivo: it doesn't work, I don't know what to do	Pattern: Challenge	
5	In Vivo: I was hysterically searching	Pattern: Challenge	
5	In Vivo: you're not prepared, you don't have anything	Pattern: Challenge	
5	In Vivo: quickly I had to think	Pattern: Challenge	
5	In Vivo: you have to find another theory that helps	Pattern: Challenge	
6	Descriptive: formulating hypotheses	Pattern: Workshop process	
6	Descriptive: experience with hypotheses canvas	Pattern: Workshop process	
6	Descriptive: client's inflexibility	Pattern: Challenge	Facilitator's Challenges
6	Descriptive: reliance of clients on canvas	Pattern: Challenge	
6	In Vivo: they were desperate	Pattern: Challenge	
6	In Vivo: did not fit into canvas	Pattern: Challenge	
6	In Vivo: it was too much	Pattern: Challenge	
6	In Vivo: change the canvas or do something	Pattern: Challenge	
6	In Vivo: you don't have to stick	Pattern: Challenge	
6	In Vivo: we have to work with this tool	Pattern: Challenge	
6	In Vivo: they were not daring	Pattern: Challenge	
6	In Vivo: they were insecure about what to do	Pattern: Challenge	
7	Descriptive: working on the strategic option	Pattern: Workshop process	Strategic Agility Process
7	Descriptive: developing the idea behind the strategic option	Pattern: Workshop process	
7	Descriptive: team's poor awareness	Pattern: Challenge	Facilitator's Challenges
7	Descriptive: developing hypotheses	Pattern: Workshop process	Strategic Agility Process
7	Descriptive: developing detailed theses	Pattern: Workshop process	
7	Descriptive: team's realization of importance of details	Pattern: Challenge	Facilitator's Challenges
7	In Vivo: he was very optimistic	Pattern: Challenge	
7	In Vivo: I don't know what they want	Pattern: Challenge	
7	In Vivo: it was a little "yay"	Pattern: Challenge	
7	In Vivo: I made him think	Pattern: Challenge	
7	In Vivo: little by little we came to the point	Pattern: Workshop Process	Strategic Agility Process
7	In Vivo: we came up with a list of 18 sub-theses	Pattern: Workshop Process	
7	In Vivo: he came to the point himself	Pattern: Workshop Process	

8	Descriptive: discussing strategic options	Pattern: Workshop process	Strategic Agility Process
8	Descriptive: enthusiasm of CEO	Pattern: Challenge	Team's Challenge
8	Descriptive: reliance on tests	Pattern: Workshop process	Strategic Agility Process
8	Descriptive: avoidance of implementing unproven ideas	Pattern: Workshop process	
8	Descriptive: compromise is better than consensus	Pattern: Workshop process	
8	In Vivo: normally, we would have a discussion	Pattern: Workshop process	
8	In Vivo: in this case, we just had to define	Pattern: Workshop process	
8	In Vivo: then we'll see	Pattern: Workshop process	
8	In Vivo: we don't have to discuss and get angry	Pattern: Workshop process	
8	In Vivo: CEO was pushy and fast-moving	Pattern: Challenge	
8	In Vivo: we say "let's test"	Pattern: Challenge	
8	In Vivo: it's very relieving	Pattern: Challenge	
8	In Vivo: they don't invest immediately	Pattern: Challenge	
8	In Vivo: they have a tool to calm him (CEO) down	Pattern: Challenge	
9	Descriptive: new strategic option	Pattern: Workshop process	Strategic Agility Process
9	Descriptive: client's feedback	Pattern: Testing process	
9	Descriptive: strategic importance of the feedback	Pattern: Testing process	
9	Descriptive: testing brings valuable information	Pattern: Testing process	
9	Descriptive: testing teams as information carriers	Pattern: Testing process	
9	In Vivo: we are not interested, but...	Pattern: Testing process	
9	In Vivo: when you do testing, you get a lot more information	Pattern: Testing process	
9	In Vivo: aware of the strategic impact	Pattern: Testing process	

Table 16. Cases-Examples Coding Process

8.8 Cases-Examples Companies Description

Company A – Company developing surgical instruments

Company B – IT-marketing company

Company C – Studio for media architectures

Company D – Software company

Company E – Insurance company

8.9 Confidentiality Statement



Appendix 03:

Student's Confidentiality Statement

Master's Thesis: Strategic Agility Facilitation

The student, Diana Lebedeva, hereby confirms with his/her signature on this document that he/she will not use the information received from ULRICH AG, AXA Insurance Ltd., UFirst Group, IART AG, SAP (name of organization) for any other purpose than for his/her Master's thesis, Strategic Agility Facilitation, and that this information will not be made available to any third party at any time without the express permission of ULRICH AG, AXA Insurance Ltd., UFirst Group, IART AG, SAP (name of organization).

The term "third party" refers to anyone not involved in the supervision or evaluation of this Master's thesis.

Winterthur, 26.08.2021
(Place, date)

