

Reflecting on the past—a key to facilitating learning in strategy practice?

Facilitating
learning in
strategy
practice

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Abstract

Purpose – The literature on the past triggering learning in strategy practice is scant. To fill this gap, this study aims to examine the meaning of the past to learning in strategy practice and expands on the strategy-as-practice (SAP) literature. Understanding the relationship between the past and learning in strategy practice is important because learning is what keeps strategy practice in motion and remains in place, even if organizations and strategy practitioners change.

Design/methodology/approach – The authors used a longitudinal case study design combined with historical methods to examine how the past is embedded in present strategy practice. To capture learning in strategy practice over time, the authors applied a four-stage methodology in our analysis of document and interview data.

Findings – The authors identified four dimensions of the past embedded in the present strategy practice. These dimensions emerged from the analysis of the interviews and document data. The study's results showed that the past appears in structures and routines, materiality, positioning and reflecting over repeated rounds of strategic planning. According to the study's results, reflecting on strategy practice draws on past structures and routines, positioning and materiality. The past facilitates reflecting and reflecting on the past enables learning in strategy practice.

Originality/value – The authors constructed a conceptual model and showed that in strategy practice, reflection triggers learning. The authors contributed to theory development by demonstrating how the past is embedded in present strategy practice and is available for use by strategy practitioners. The authors showed that strategy practice is a continuous learning process.

Keywords Learning, Past, Strategy-as-practice, Strategic planning

Paper type Research paper

Introduction

Strategy-as-practice (SAP) (for reviews see Jarzabkowski *et al.* (2007), Jarzabkowski and Spee (2009), Kohtamäki *et al.* (2022), Seidl and Whittington (2014), Vaara and Whittington (2012)) has attracted increasing interest in the past two decades (Golsorkhi *et al.*, 2015; Kohtamäki *et al.*, 2022). SAP considers strategy as something that people in organizations do as opposed

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to the traditional view of strategy as the property of organizations (Whittington, 2006, 2007). Strategy is enacted through strategizing, the interactions between strategy practitioners and practices, which together continuously construct strategy practice (Jarzabkowski, 2005; Jarzabkowski *et al.*, 2007). Strategy practice covers the whole arena of strategy work, including practitioners, different tools and techniques, actual activities as well as the ways to consume the products of strategizing. In strategy practice, practitioners often engage in formal practices such as strategic planning (Whittington, 2003). Indeed, strategic planning is a common and widespread example of strategy practice (Begkos *et al.*, 2020; Langley and Lusiani, 2015) which provides the means of formulating, implementing and controlling strategy and strategizing activities in an organization (Wolf and Floyd, 2017).

Even if literature often suggests the past to be a source of inertia and an impediment to change, the past can also be used strategically to advance organizational purposes (Suddaby and Foster, 2017), to create continuity or change (Brunninge, 2009), to enhance legitimacy of actions (Foster *et al.*, 2017; Suddaby, 2016), or to build organizational identity and culture (Foster *et al.*, 2017). Consequently, the past promotes learning (Kolb and Kolb, 2005; Kolb, 1984) and change, provided that it is available for practitioners to utilize (Schultz and Hernes, 2013; Suddaby and Foster, 2017). This guides us to consider the past as an important related aspect of learning in practice. Experiential learning theory supports this assumption by highlighting the importance of past experience in learning. Learning occurs when past experience is captured from practice and transformed via reflection into new knowledge to be applied in practice (Kolb, 1984). In this light, experience lies in the past, and past experience enables future learning in strategy practice.

In previous SAP literature, the past is touched upon in the notions of practice as historically embedded and evolving based on previous practices (Jarzabkowski, 2005; Vaara and Lamberg, 2016). To date, however, how the past is embedded in the present and facilitates learning and future strategy practice has received very little attention, even though we believe it is key to the further development of SAP. Understanding the influence of the past is important as it may alter strategizing and future strategies. Past experience with dysfunctional or functional strategy practices may guide the future use of those practices. This, in turn, may direct the strategizing and provide very different outcomes in practice. Past strategies, in turn, may open new perspectives or constrain future strategies, thereby providing an alternative future for an organization. Furthermore, the past is embedded in strategy practice and may guide future practice, even if practitioners change. In this sense, the past may latently guide the entire strategizing process. Understanding the presence of the past enhances our comprehension of this latent shade of strategizing. To fill this gap, we examine how the past is embedded in current strategy practice and used to facilitate learning. We use strategic planning as an example of strategy practice and explore the evolution of strategy practice over a nine-year period in one organization.

We address the following research question: *How does the past trigger learning in strategy practice?* To answer this question, we needed to analyze how the past is embedded in strategy practice over time. A longitudinal research design (Yin, 2014) was adopted to tap into the evolution of strategy practice. The empirical data consist of archival documentary data from annual reports, strategy documents and minutes of meetings with appendixes that cover the nine-year period, which is the entire lifespan of the organization. To complement the archival data and capture the experiences of strategy practitioners, we also conducted two rounds of semi-structured interviews.

Our study extends SAP research on learning in strategy practice and the meaning of the past in the constitution of strategy practice. First, we show how the past is embedded in present strategy practice; we find that the past is embedded in structures, materiality, positioning and reflecting. This extends the current SAP research by showing how the past is implicitly present in strategy practice. Second, we contribute to the literature on SAP by

scrutinizing how the past triggers learning in strategy practice; we find that the past has a two-fold meaning for learning in strategy practice. First, the past provides continuity as practices emanate from the previous strategy practices. Second, the past triggers learning in strategy practice through reflection. Third, we argue that strategy practice is a continuous learning process, which involves reflecting on the past. Consequently, we make a theoretical contribution to SAP by arguing that reflection is an essential feature for understanding learning in strategy practice and constructing a conceptual model of reflection as a trigger for learning in strategy practice.

The paper is structured as follows: First, we review relevant literature on SAP and learning in practice. Then, we present our methodology and findings. Finally, we conclude by discussing the theoretical contribution of the study and suggesting avenues for future research.

Theoretical background

Strategic planning in strategy-as-practice

SAP is interested to understand the mundane work of strategizing on a micro level (Golsorkhi *et al.*, 2015; Jarzabkowski, 2005; Whittington *et al.*, 2006). In SAP literature, strategy is defined as a situated, goal-oriented action that takes place over time (Jarzabkowski, 2005) and is institutionalized in organizational practice (Whittington, 2007). Strategy can also be seen as an “*organized consistency of purposive actions*” (Chia and Holt, 2006, p. 636), implying a continuum of activities. Thus, strategizing is a process which unfolds gradually and entwines thinking, acting and learning for the team involved in the process (Bryson *et al.*, 2022). Strategizing refers to these different planning, implementation and control activities that are utilized in the enactment of strategy (Jarzabkowski and Fenton, 2006).

Strategizing combines the main concepts of SAP: strategy practitioners, strategy practices and strategy praxis. Strategy practitioners are defined to include all actors participating in strategy practice. Praxis, in turn, means the actual activities and doings of practitioners during strategizing (Whittington, 2006). SAP defines strategy practices as “*shared routines of behavior, including traditions, norms and procedures for thinking, acting and using things*” (Whittington, 2006, p. 619). Indeed, these practices are “habituated, and internalized” (Chia and MacKay, 2007), guiding actions that conform with established ways of acting (Chia and Holt, 2006). Practices have continuity, that stretch over several episodes of strategizing (Kohtamäki *et al.*, 2022). This highlights the meaning of the past in strategy practice.

Strategic planning is a widely used strategy practice that involves a range of activities (Begkos *et al.*, 2020; Langley and Lusiani, 2015) used to decide and formulate the strategic direction of an organization (Langley and Lusiani, 2015; Ocasio and Joseph, 2008). The resulting strategic plan is implemented and evaluated in practice. Thus, strategic planning can be defined as a process that provides structure for formulating, implementing and controlling a strategy (Poister *et al.*, 2013; Wolf and Floyd, 2017). Traditionally, strategic planning has been seen as a top-down process (Mintzberg, 1990) characterized by standardized and goal-directed planning routines and an explicit chain of command (Ocasio and Joseph, 2008). However, in strategy practice, the implementation and formulation of strategy may be intertwined into a simultaneous and continuous process of strategy making (Hydle, 2015). Alert strategic leadership balances linear combinations of induced and autonomous strategy processes in strategic dynamic situations by influencing corporate longevity and keeping the organization viable. In the induced strategy process, strategic actions are derived from the corporate strategy. In the autonomous strategy process, new opportunities come from outside the existing corporate strategy (Burgelman and Grove, 2007). Thus, strategic planning can be seen not only as a formal deliberate strategy development process for elaborating on plans, but also as an emergent process where new

initiatives with shared goals and objectives are implemented in the changing environment (Vilà and Canales, 2008). Therefore, strategic planning is an iterative process that offers opportunities to practitioners to learn in strategy practice over time.

Drawing on the past experience to learn in strategy practice

In the adult learning literature, the constructivist approach emphasizes learning as a construction of knowledge and a meaning-making process from past experience (Merriam and Bierema, 2014). One of the seminal theories on learning that draws on past experience is Kolb's (1984) experiential learning theory. Kolb defines experiential learning as a process in which learning arises from a concrete experience and proceeds via reflection to conceptualization and acquisition of new experiences. Learning transpires within two dimensions: grasping and transforming experiences. Experience arises from practice and is comprehended through abstract conceptualization. This also allows practitioners to grasp the past experience later when the immediate concrete experience becomes past. Internal reflection allows us to understand the meaning of experience and to practice based on experience. This transforms past experiences into action. Thus, experiential learning is a combination of physical and social circumstances and the human entity's effort to adapt to them (Kolb, 1984). Learning is a continuous process in which knowledge is continuously reproduced (Kolb, 1984) and refined over time (Kolb and Kolb, 2005). Most recently, the experiential learning theory has been used to examine, for example, management accounting system change (Giannetti *et al.*, 2021), and entrepreneurial failure (Lattacher and Wdowiak, 2020).

Learning in the workplace is often informal and unstructured, and informal learning is part of daily practice (Marsick and Volpe, 1999). Learning takes place inside work processes, such as problem solving, working in a group, or trying out things in practice (Eraut, 2007). The ability and opportunity to participate and engage in work practices is therefore essential for learning (Billett, 2002a, b). It has been argued that work-based experience is also rooted on situational factors and historically mediated work practices (Billett, 2002a) because the current practice is molded by historical influences (Chia and MacKay, 2007). The past can be embedded in the present through structures and experiences (Hernes and Weik, 2007), or in practices that have evolved based on previous practices (Vaara and Lamberg, 2016), including sediments, that is, holdovers from the past (Heusinkveld and Benders, 2012). The past can also be present as practitioners pursue consistency with previous actions, intuitively working to connect strategy practice with the past. It has been suggested that actions and strategies are non-deliberative and reflect a *modus operandi* (Chia and Holt, 2006), a disposition to act in conformity with established customs, and previous experiences over time (Bourdieu, 1990). These dispositions are historically mediated and internalized as practitioners engage in practice and learn codes of behavior. Dispositions are also a collective and routinized understanding of the practice and reflect a shared knowledge scheme of how to engage in practice (Rasche and Chia, 2009).

Previous literature has recognized several factors, on individual, group and organizational levels, that trigger informal learning in practice (Jeong *et al.*, 2018). On an individual level, personal and job characteristics (Jeong *et al.*, 2018; Kyndt and Baert, 2013), such as the motivation to learn and adequate challenges, trigger learning (Eraut, 2007; Jeong *et al.*, 2018; Kyndt and Baert, 2013). Learning is triggered if practitioners encounter a need, awakened by a surprise, a new situation, or dissatisfaction in the current way of doing things (Marsick and Volpe, 1999; Marsick and Watkins, 2001). In this situation, they compare their prior experiences to make sense of the situation, evaluate the context and explore alternative actions (Marsick and Watkins, 2001). To grasp these experiences, it is important that practitioners are able and willing to participate in practice (Billett, 2002a) and learn (Ellinger

and Bostrom, 2002). In a group, leadership and interpersonal relationships (Jeong *et al.*, 2018), encouragement to learn (Ellinger and Bostrom, 2002), supportive feedback (Ellinger and Bostrom, 2002; Eraut, 2007; Jeong *et al.*, 2018; Kyndt and Baert, 2013) and reflective dialogue support learning (Eraut, 2007; Jeong *et al.*, 2018). On an organizational level, learning is supported by work tools, interventions, organizational characteristics (Jeong *et al.*, 2018) and a positive learning culture (Jeong *et al.*, 2018; Kyndt and Baert, 2013).

Strategizing is an iterative and dynamic experiential learning process in which previous work experience, individual characteristics and organizational context stimulate knowledge creation and the ability to think strategically (Casey and Goldman, 2010). The strategic planning process offers an arena for learning, as the process consists of providing ideas, questioning and negotiations between participants. Practitioners engaging in strategic planning learn not only about what the strategy is over time but also about the social side of strategizing, such as power relations and the difficulties of discussing specific content issues (Borström, 2020). Altogether, this highlights the importance of experience as a cornerstone for learning. Past experiences can either strengthen old practices, or facilitate learning and development of new practices (Casey and Goldman, 2010). Prior personal experience shapes how an individual acts and interacts in a situation. At the same time, the social and physical worlds manifesting in shared practices, norms and traditions shape the situation. Thus, personal experience interplays with the physical and social worlds in practice. This not only shapes learning at an individual level but also molds the shared practice (Billett, 2009). Therefore, to understand strategy practice, we should focus on its background and past practices which shape our actions as they are transmitted over time (Chia and MacKay, 2007).

Methodology

Research strategy and case context

From a historical perspective, the past also has a future (Yates, 2014) beyond the reach of case studies, utilizing a cross-sectional research design. We adopted a longitudinal case study design, as this enabled us to track changes over time (Yin, 2014) and to allow for an in-depth analysis of the evolution of strategy practice (Langley *et al.*, 2013). Because strategic planning as a strategy practice is considered a continuously evolving process (Burgelman *et al.*, 2018; Langley *et al.*, 2013), therefore, here, a longitudinal case study design was combined with a historical perspective. To produce a fine-grained description of the phenomenon in question, the current study examined the evolution strategy practice of one Finnish public healthcare organization. This particular case is especially interesting (Stake, 1995) because we witnessed the entire lifespan of the case organization, from its emergence to its demise. The establishment of this case organization meant reorganizing the existing units that offered specialized medical services for other healthcare units in the same administrative entity. The case organization had a divisional structure with different business units that consisted of several subunits, together totaling approximately 1,000 employees. A municipal enterprise was adopted as the organizational form. Municipal enterprises are part of the municipal organization, and their administration is organized according to the regulations stated by the councils (Finnish Local Government Act 2007/519). Thereby, municipal enterprises are closely connected with municipal administration. The foundation of the case organization was justified with the strategy of the conglomerate and the ability of this particular organizational form to operate in the markets. In this way, the decision reflected a wider cultural movement in Finland to establish municipal enterprises (Kallio and Kuoppakangas, 2013).

A formal preparation period preceded the foundation of the case organization, which concentrated on establishing a formal organizational structure. In the case organization, there were four iterations of varying strategic planning over time (Figure 1). These iterations were facilitated by prevailing cultural and social contexts and the intensity of strategic planning. The

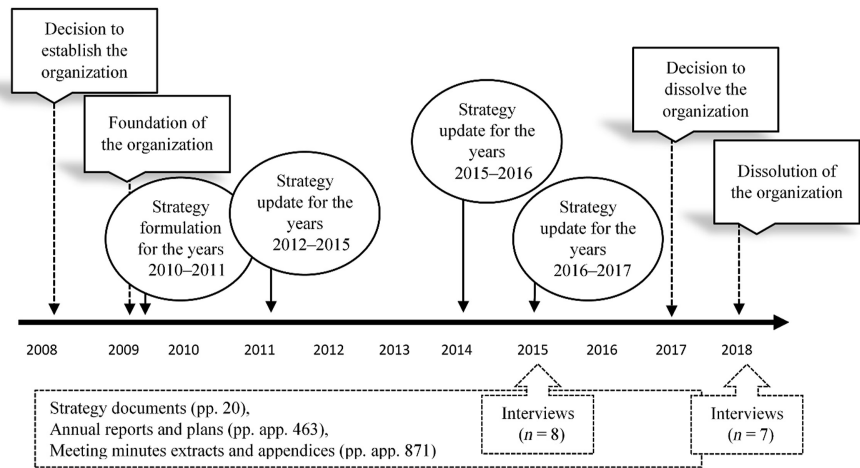


Figure 1. Timeline of the data collection for the study

first strategy document was formulated shortly after the organization began its operations. At the beginning, strategy practice was characterized by the social context of merging different units together and aimed at establishing shared aims and critical success factors in addition to shared functionalities that would benefit the case organization as an integrated whole. Consequently, strategy became one mechanism for integrating the units. During the first strategy update, traces of strategic planning in the documents occurred less than during the original strategy formulation. Later, the strategic plan was updated twice. In addition, the strategy map included in the strategy document was updated once as part of the annual plan. Later, a decision to dissolve the organization was made, leading to the dispersion of the units to the municipal organization and the end of the municipal enterprise as an organizational form.

Empirical data collection

The current study used archival data, which are typical data sources for historical research (Ericson *et al.*, 2015; Kipping *et al.*, 2014; Lipartito, 2014). The archival data consisted mainly of annual reports, strategy documents and the minutes of meetings (see Table 1 and Figure 1). To capture the experiences of strategy practitioners, interviews were conducted to complement the archival data. The first author was responsible for data collection and analysis. However, the analysis was discussed with the other authors throughout the analytic process. The interview data were gathered through semistructured interviews with management members who were experienced in strategy work at the organization. The choice of informants was purposeful, with a list of potential interviewees having been received from the organization.

Archival data	Number	Approximate number of pages
Strategy documents	4	20
Strategy seminar working paper	1	42
Annual plans	6	128
Annual reports	8	335
Meeting minutes extracts and appendices (includes also interims)	182	871
Other documents	1	16
<i>Total</i>	<i>202</i>	<i>1,412</i>
Interviews	15	

Table 1. Data used in the study

Those ($n = 8$) who agreed to participate were interviewed in 2015. The themes of these interviews covered the formulation of strategic objectives and utilization of key performance indicators (KPIs). More interviews ($n = 7$) were conducted at the beginning of 2018, immediately after the dissolution of the organization. Six of the interviewees had taken part in the previous interview round. This time the interview protocol was extended to include retrospective questions about the evolution of strategy practice. In these interviews, the strategy maps were used as facilitators for thinking, when the interviewees were asked to describe the changes in strategy over time. All the interviewees had several years of experience in the healthcare sector and in management. The length of the interviews varied between 40 and 130 min (with a mean 68 min).

Data analysis

We drew on iterative research because it fitted well with a historical methods study (Ericson *et al.*, 2015; Kipping *et al.*, 2014). To capture the learning over time, we applied a four-stage methodology. The first stage chose the relevant documents; the first author read all the agendas of the minutes of meetings ($n = 259$), mainly those of board and top management team (TMT) meetings and chose extracts and appendixes relating to strategy formulation, objectives, implementation, or control for further analysis. During this phase, all document data were labeled, numbered and organized into a database.

In the second stage, an abductive analysis was conducted to identify practices related to strategic planning. The first author used the method set out by Gioia *et al.* (2013) and coded the material to identify the first-order codes. These codes were compared to find similarities and differences and then assigned to first-order categories. During the second round of coding, the first-order codes were integrated into more abstract categories. The strategy was to move back and forth between the data and the emerging structure of the theoretical arguments. The practices were then grouped into production, textual and consumption by utilizing the theoretical framework of Langley and Lusiani (2015), which allowed exploration of strategic planning as a social practice. The document selection and data analysis were discussed together. To enhance trustworthiness, ensure an understanding of the documents' meaning, and determine how to proceed with the analysis, a few of the documents were read by all the authors. These discussions set the direction for further analysis and were used as a basis for the research design decisions, which were made together.

In the third stage, additional documents and meeting minute extracts were used to provide a better understanding of the context. By triangulating the data, the first author created a timeline for the activities to create an overview of the evolution of strategy practice (Kipping *et al.*, 2014; Lipartito, 2014; Mills and Mills, 2018; Yates, 2014). The first author moved back and forth through the data in a hermeneutic circle, to track continuities and discontinuities in practices identified in the second stage, until interpretation was solid (Kipping *et al.*, 2014). Based on these, the practices were bracketed (Langley, 1999) into four temporal phases of evolution.

In the fourth stage, the first author scrutinized how the past was present in future practice throughout these phases. As a result, *structures* and *routines*, *materiality*, *positioning* and *reflecting* emerged as the dimensions related to the past embedded in current strategy practice. Following the instructions of Gioia *et al.* (2013), the names of the categories, themes and dimensions emerged from the data and represent its contents. These were grouped into a data structure (Table 2).

Results—using the past to facilitate learning in strategy practice

Next, we will present the findings of our analysis. Four dimensions of the past embedded in present strategy practice emerged from the analysis of the interview and document data. These dimensions were structures and routines, materiality, positioning and reflecting (see Table 2). The dimensions are analyzed next.

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Illustrative activities in the data * (first-order categories)	Intermediaries of the past (second order themes)	Dimensions of the past (Aggregates)
<ul style="list-style-type: none"> Scanning the environment Formulating vision and critical success factors in strategy seminars Accepting the strategy 	Formulating	Structures and routines
<ul style="list-style-type: none"> Defining objectives annually for the strategic aims 	Annual planning	
<ul style="list-style-type: none"> Reporting implementation and attainment of objectives in annual reports 	Reporting and control	
<ul style="list-style-type: none"> TMT formulating the strategy Board accepting the strategy Participating in implementation 	Participation	
<ul style="list-style-type: none"> Using textual expressions from previous strategic plans and documents Using similar structural features in strategic plans Storing history and past actions in documents 	Artifacts	Materiality
<ul style="list-style-type: none"> Using scorecard and KPIs Using strategy map based on the EFQM 	Tools	
<ul style="list-style-type: none"> Including important things to the units in strategy Emphasizing similar content issues Ensuring coherence with the conglomerate's strategy 	Strategic orientation	Positioning
<ul style="list-style-type: none"> Using the previous strategy as a background material Grounding goals on previous goals 	Strategy as continuum	
<ul style="list-style-type: none"> Experience of shared strategy work Experience of practices Experience of previous implementation 	Past experience molds the future	Reflecting
<ul style="list-style-type: none"> Using past performance as a reference point for the future Evaluating trends in relation to the past Scrutinizing what has been done Evaluating previous aims 	Using past as a trigger for the future	

Table 2.
Data structure:
dimensions of the past
in strategy practice

Note(s): *For illustrative quotations, please see the results section

Past embedded in structures and routines

Strategy formulation followed a similar structure over time. The structure for strategic planning and control was first established and inserted as a routine into strategy practice. The strategy was drafted in the TMT meetings and strategy seminars and finally approved by the board. The operational objectives derived from the strategy were updated and approved annually, as part of the annual planning process, as the organization's official

documents confirm. Formal reporting structures were also established in the early stages. The strategy proposal presented to the board in 2009 already included a plan to evaluate the strategy implementation, and the reporting described how objectives were attained annually. Over time, formal reporting was made in interim or annual reports until the organization's dissolution:

Well, we have mainly made it [reporting] in interims. And in certain indicators it is good, or I do not know, sensible, with current practices, to take the indicator only to the annual report once a year. But the aim is that we could both at the enterprise and unit level in interims; in other words, within four months, see the situation and if we can influence it before the year is over. So not every month, but either in interims or in the annual reports. (Participant 3, interview 2015)

The responsibility for strategy formulation was entrusted to the TMT when the organization was being set up. The board of municipal enterprise was an acceptor of strategy, operational goals and annual reports; this role was justified in terms of the statutory duties of the board and formal organizational procedures:

Well, we first approve these critical success factors, and the TMT, with the board, prepares the aims. In fact, we have no choice because [—] regulations say that the board needs to set the aims and follow them. (Participant 3, interview 2015)

In this way, their participation was connected to a formal structure. Because the formal process remained the same, this form of participation persisted in strategy practice. Consequently, these established statutory duties set boundaries for strategy planning. Thus, participation was closely linked to procedural strategizing, which establishes legitimized routines to perform strategy work and defines who participates in strategy practice (Jarzabkowski, 2005). However, wider participation concentrated on strategy implementation over time.

Past embedded in materiality

The past was also present in materiality in the form of artifacts. The strategic plan as an artifact included textual and structural elements from the past. Even if the strategic plan was updated and reformulated in a new structure, a closer reading reveals that it still included similar structural elements over time. These elements were an environmental analysis, a vision statement, a description of customers, a strategy map, the operational objectives and an evaluation of the cohesion with the conglomerate's strategy. The textual expressions also evolved along with environmental changes, but were partly founded on previous texts. Therefore, new texts included traces from the past in the form of sediments. For example, the strategy document from 2015 included a few of the same sentences as previous documents, despite its reformulated appearance:

The municipal enterprise combines the needed competence and capacity to produce medical services together that are needed by the population in healthcare (Strategy documents 2015, 2014, 2011 and 2009).

Past actions were stored in the form of reports in documents that held past actions and decision-making processes. Thus, the practitioners could later return to these past actions:

Personally, I many times grab the interim. Especially when I make this year's interim, I pick up the interim from last year and then I mirror them a bit. (Participant 2, interview 2018)

Another aspect of materiality was the use of similar tools over time. All the strategic plans included a strategy map and scorecard, which included critical success factors and corresponding objectives and indicators. Although the use of tools evolved over time, the use of similar tools persisted in strategy practice.

Past embedded in strategic positioning

The contextual need to create unity at the beginning had implications for the strategy content and textual practice. It was important to find shared critical success factors to include in the municipal enterprise's first strategic plan, since the units were seen as different. Because the strategy content was historically embedded to include important things to the units, the general strategic orientation included in the plan remained relatively the same over time, even though the strategy was focused and updated:

Well, these basic elements have not changed. The top team includes all of the staff, competence, leadership, shared operations, customer service; it includes all of these elements. And then this reliable companion, well, it is internal reliability, it is reliability in services and in service-customer relationship and reliability in relation to society. It is like everything. And then these immediate results, societal impacts in this first [strategy] are in this best health benefit. So, there are these basic elements, but they are presented in a more concise manner. (Participant 6, interview 2018)

However, this does not imply inertia in strategic planning, because the strategic plan was continuously evaluated. In this way, the studied organization's annual objectives and indicators could change to emphasize current important issues, even if the critical success factors emphasized similar issues over time. Previous objectives served as one starting point for future objectives. For example, the previous strategy document was a part of a strategy seminar working paper in 2014, and updating the strategy started from this previous strategy map:

Well, of course, the base map has been there. When we started updating, it began from the already made strategy map. It has been there as a foundation in that way. (Participant 7, interview 2018)

Consequently, strategy as a continuum reflects the idea that strategic planning evolves based on previous practice. New strategy was connected to the past by utilizing previous strategy for new strategy and previous strategic planning can be seen as a precondition for the evolution of strategic planning.

Past embedded in reflecting

Reflecting included an embedded past. Previous strategy work, the use of tools in practice and experience with the past implementation activities had implications for further strategic planning. For example, if the measurement of a certain objective proved difficult, either the indicators or objectives were modified. During a previous implementation, some of the objectives were experienced as overlapping, which had implications for future strategies, because the strategy content was incrementally focused. The next quotation reflects how experience with past practices facilitated learning and resulted in modifications in future practices.

It [experience] is quite important. The first strategies tend to be general strategies. Then, when you have been more often with and formulate it and have seen how they are implemented, then, perhaps, the strategy somehow focuses, and there are not too many ideas in it. (Participant 4, interview 2018)

After the first strategy's formulation, the importance of the objectives and their implementation were highlighted discursively as a necessity. The strategy was displayed as an objective-setting tool and guide for action over time. Consequently, it was also important to control the implementation. The achievement of objectives showed past performance, which was used as a reference point for future actions. To see the change, it would be important to see how performance had developed in relation to the past. Thereby, the past served as a reference point to evaluate the current situation and as a guide for future actions:

Sure, compared with the past, in other words, you need to be conscious of the timeline. And then compare it to the goals, which stem from previous goals so that you can form a view of current market situation with goals and previous performance. (Participant 8, interview 2015)

I personally think that these should be utilized when the next goals are set, the goals for the next year, or the following years. They are useful if they support decision making. If not, you can question: Is this right? And perhaps—and I know this is a difficult and challenging thing—but in this, I would hanker for a longer-term perspective. [—] So, this kind of continuum, if it is made well and gives good information, naturally becomes a continuum. And this is perhaps a thing where I see the meaning of reporting, control and strategy. (Participant 5, interview 2015)

Past experiences with shared strategy work clarified the meaning of strategic planning and allowed practitioners to delve deeper into their strategizing. The experience of the formulation of previous strategies and their implementation was regarded as helpful for more detailed strategizing. However, experience could also hinder development. Therefore, reflection on the past allowed practitioners to recognize these enabling and disabling features of past experience:

Well, it is possible. It is a long-term task, but it is possible, and different units adopt it at different paces. But it is worth the effort, and it is like the management's red thread. So, actually, without a strategy, you cannot have a discussion on the goals or analyze if we are heading in the right direction. So, leading without a strategy is like the lady of the house walking to the granary without the keys . . . (Participant 3, interview 2018)

Previous experience, well, I do not know. Of course, that you have worked together gives direction forward. On the other hand, the old strategy—if you want to make a bigger change, like here—is a burden. We have one like this: How should we proceed? [—] Previous experience is good; you can think about it, and you know what is pursued and why. But then, when you fasten to the old, it is a challenge. So, you get thoughts flying. (Participant 1, interview 2018)

In 2018, several interviewees reflected on past strategic planning in the case organization relating to the future. Scrutinizing past actions was done in relation to what would be done in the future. These reflections were on the challenges of strategic planning in the case organization, such as diversity, but also on future strategic positioning. For example, one of the interviewees reflected on future aims in relation to past strategy:

Well, now we need to consider whether these are the aims that we want. And whether we still want to keep these three main focuses. Are these three aims what we want to follow and pursue? This will come into discussion this spring. But here is, well, here are very relevant issues. (Participant 1, Interview 2018)

To summarize, by reflecting on past experiences with strategy work and previous practices, the past is embedded in strategy practice and serves to facilitate the evolution of strategic planning. Concurrently, structures and routines, materiality and positioning are embedded in the past, providing a continuum for future actions.

Discussion—The meaning of the past for learning in strategy practice

Next, we elevate our empirical findings to a more theoretical level. We present a dynamic model of the past triggering learning in strategy practice (Figure 2). As practitioners reflect on past strategy practice, they can learn and enhance future strategy practices. Our results indicate that strategy practice evolves incrementally over time, allowing the past to be embedded in strategy practice. In this sense, current practice is a result of the past because it has evolved over time to take its present form. However, as practitioners *recall and reflect* on their previous experiences, they *use past experiences to alter future practice*; in other words, they learn. Therefore, an organization's past facilitates learning in strategy practice. In fact, repeated rounds of strategic planning are continuous learning processes.

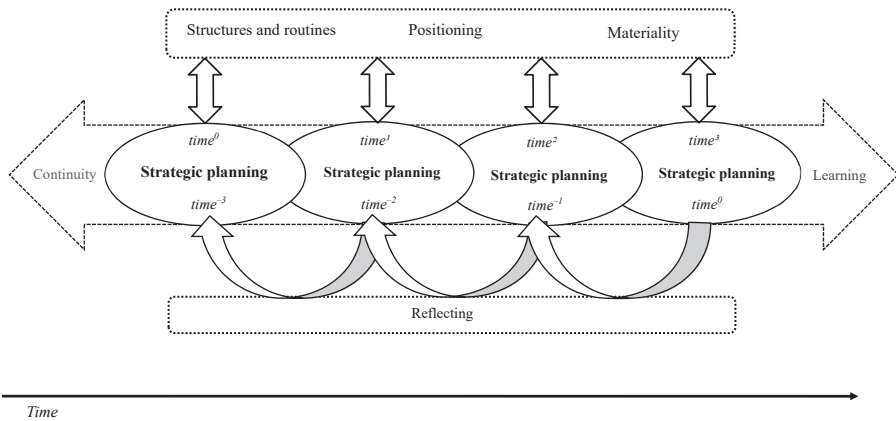


Figure 2.
The past triggers
learning in strategy
practice

There are multiple cycles in strategic planning that become layered as time passes. In particular, we find that the past is embedded in structures and routines, materiality, positioning and reflecting. We find that some practices persist over time and have continuity. Strategy formulation practices, annual planning, reporting and forms of participation were established at the beginning and continued over different phases of the evolution of strategy practice. [Ocasio and Joseph \(2008\)](#) describe formalization—which is reflected in efforts to create formal structures and define a chain of command for formulation, implementation and control ([Ocasio and Joseph, 2008](#); [Wolf and Floyd, 2017](#))—as a distinctive characteristic of strategic planning. This provides structural legitimacy and commonly shared and approved ways of doing strategy ([Jarzabkowski, 2005](#)) and the past is carried into the future in the routines and structures which persist over time.

Furthermore, the past also shows in materiality. Materiality in the form of artifacts stores past actions in documents and includes sediments of past textual practices. Materiality also refers to tools utilized over time in strategy making. These tools may facilitate social interaction, but it has been suggested that this social interaction may be reduced to an artifact with limited relevance to current strategy practices ([Spee and Jarzabkowski, 2009](#)). However, our results indicate that artifacts also provide continuity for strategy practice because they are utilized to recall previous actions for providing consistency. Furthermore, our results show that artifacts are used to reflect on previous practices.

Our results also indicate that the past is present in strategic positioning because the strategic orientation of the case organization remained similar over time. This result may stem from the nature of public service production and the pluralistic environment ([Denis et al., 2007](#)). Instead of maximizing profits ([Bryson et al., 2010](#)), public organizations pursue productivity, effectiveness and quality of services, which was reflected in the strategic plan of the case organization. Because these are generally perceived as good aims, it is unnecessary to make a complete shift in strategic direction. Strategy may also represent the collective intent ([Langley and Lusiani, 2015](#)) and a long-lasting agreement of the strategic direction of the organization. Consequently, strategy may be stable over time because practitioners are restricted in practice by previously reached strategy agreements ([Denis et al., 2007](#)). Over time, as previous plans were reused, strategic positioning become layered and sedimented in practice, thereby becoming embedded in past, even if there was a “new strategy period” or “new strategic plan”. However, inside the strategic plan, the operational objectives were defined annually. Therefore, instead of scrutinizing the strategic aims in a pluralistic environment, operational objectives

deserve more attention. Our results indicate that operational objectives may be more adaptive to environmental changes and thereby, can be regarded as strategic in a traditional sense.

The past can also emerge in reflections of past actions, previous objectives and the achievement of these objectives in relation to the future. Selecting future actions utilizes retrospective evaluation (Suddaby and Foster, 2017), and the past was used to guide future action through reflection (Raelin, 2001). In this way, reflection supported learning what is achievable in practice and how and when something should be done. On the other hand, reflection is about scrutinizing the meaning of experiences, such as practitioners' actions, beliefs, or feelings. Here, retrospective reflection is defined as reflection that draws on the past and, afterward, scrutinizes previous experiences (Raelin, 2001). Mezirow (1991) argue that reflection allows practitioners to scrutinize habitual ways of interpreting previous experiences. Reflection can focus on the contents, processes, or premises of our perceptions, feelings, thoughts and acts. The content reflection ponders the actual events—in other words—what happened, what was thought and what was felt. Process reflection, in turn, focuses on how these advanced in practice and premise reflection seeks to understand why this occurred, and to question the assumptions or courses of action taken for granted. Our results show that the practitioners reflected on strategy practice from these different perspectives. They were reflecting on what they had done, and how the strategy process was realized. They also reflected on why they were doing specific activities and why strategies were needed in an organization. Interestingly, the direct question of what the practitioners had learned over time was difficult for them to answer. Instead, the questions on activities and how the practice of strategic planning had changed over time prompted the interviewees to reflect on how strategic planning had evolved and why the changes had occurred. This is an interesting discovery because future studies exploring learning in strategy practice may benefit by approaching learning indirectly. The practitioners may not use a word or concept of learning. Instead, the practitioners talk about their strategy practice. According to our results, reflecting on strategy practice recalls and draws on past experiences. In this way, past structures and routines, positioning and materiality all provide opportunities for reflection. Through reflection, these previous practices are scrutinized and adapted to fit current and future needs in strategy practice. Because strategic planning was guided by efforts to enhance practices, these were adjusted over time as practitioners learned what worked or did not work in practice. In this sense, premise reflection and questioning of why activities are performed is especially essential for learning (Merriam and Bierema, 2014). The past facilitates reflection, and *reflecting on the past* provides the seed for enabling learning in strategy practice.

Looking at our model through the lenses of experiential learning (Kolb, 1984), we note that the episodes of strategic planning serve as a source for the *concrete experience*. However, this experience alone does not trigger learning. The past experience of strategizing needs to be *conceptualized* in structures and routines, positioning and tools to provide a collective repository of past experiences. Learning occurs if practitioners *reflect on* this experience and seek to alter their strategy practice by *actively experimenting* with new practices during repeated rounds of strategic planning. In this sense, past experiences and reflection come together in present strategy practice, and learning occurs when experiences are conceptualized and transformed via reflection into new knowledge that is experimented with in practice (Kolb, 1984). To summarize, both experiential learning theory (Kolb, 1984) and informal learning theory (Marsick and Watkins, 2001) highlight the meaning of previous experience in learning. Indeed, the origin of learning lies in practice, and experience arises from engaging in it (Kolb, 1984; Marsick and Watkins, 2001). Therefore, we put the practice of strategic planning at the center of our model. However, learning is not an outcome or closed loop (Kolb, 1984); rather, it is a continuous process in which the past becomes layered and frames future actions. According to our results, episodes of strategic planning following each other have continuity but are different because of learning. This leads to a continuous learning process in strategizing.

Concluding remarks

SAP has been focused on mundane strategy practice in its various forms and highlights the intertwined role of strategy practitioners, practices and praxis (Whittington, 2006). Strategic planning as a strategy practice may be regarded as a formal process (Wolf and Floyd, 2017), but it is also an evolving social practice (Langley and Lusia, 2015) and a learning process for practitioners (Brorström, 2020). We posit that strategy practice is continuously refined and that it is an embodiment of learning over time. However, the literature on how the past is embedded in strategy practice and interrelates with learning is scant. To fill this gap, the current study asks the following question: *How does the past trigger learning in strategy practice?* Our results show that over time, there are continuities in practice that offer a perspective of these past practices. Over time, the past is accumulated in current strategy practice, and the past provides continuity for strategy practice. However, the past is also a seed for evolution, if the past is reflected on and utilized to facilitate development and learning. This expands our understanding of the role of the past for learning in strategy practice. We will next discuss the theoretical contributions of our study.

First, we extend the SAP literature by exploring how the past is embedded in present strategy practice. Our study contributes by demonstrating that the past appears in structures and routines, materiality, positioning and reflecting. Previous research indicates that the past can be embedded in structures or experience (Hernes and Weik, 2007); however, our results show that in strategy practice, the past can also be embedded in the present through materiality and positioning. We also found the past to be embedded in strategy practice through reflecting, which includes past experience. To summarize, these results extend the SAP literature by showing how the past is embedded in strategy practice and is available for use by strategy practitioners.

The second contribution is our model of reflection as a trigger for learning in strategy practice (Figure 2). We show that strategy practice is built on previous practice and that some strategy practices persist over time. Based on our results, the past is embedded in strategy practice in the dimensions of routines and structures, materiality and positioning. These dimensions of the past represent strategy practices in which the past is transmitted to future episodes of strategizing. These strategy practices are the repository of knowledge and represent a customary manner of strategizing. This historical legacy means that their roots lie in the past, and they are the bedrock on which future practice is built. Thus, these dimensions of the past provide continuity. However, continuity does not imply that change is absent (Brunninge, 2009; Denis *et al.*, 2007). Over time, practitioners gain experience in strategizing and strategy implementation, and can reflect on the outcomes of their strategy practice. When practitioners reflect on and make meaning of this experience, they learn. Learning accumulates over time, as past experiences are linked to new ones (Merriam and Bierema, 2014).

Schön (1983) suggests that practitioners use *reflection-on-action* to think about their actions before making decisions. Reflection-on-action can also retrospectively focus on past actions to evaluate what has been achieved (Walger *et al.*, 2016). Past practices are vivified by practitioners as they reflect on their past actions, which are then formed into routines or materialized into strategic plans, for example. Through reflecting, practitioners use the past to learn and develop an organization's strategy practice. In particular, reflecting on what happened, how it happened, and why it happened provide a means for learning and altering future practice (Merriam and Bierema, 2014; Mezirow, 1991). Reflecting on the past serves as a trigger for future evolution and learning. In this way, practice evolves as practitioners learn and draw from the past over time. Thus, practitioners should be able to participate (Billett, 2002a, b, 2009) in strategizing to acquire experience and transform such experience into new knowledge via reflection (Kolb, 1984). Past experience enables reflection, since without past

experience, there is nothing to reflect upon. Thus, reflection on past experiences and previous practices triggers learning, and the past is vital in enabling learning from experience in strategy practice. It is important to note that based on our results, the evolution of strategy practice requires individual reflection on shared strategy practice. As a theoretical contribution, we posit that *reflecting* is essential for understanding learning in strategy practice.

Third, our results show that focusing solely on cross-sectional episodes of strategic planning hides a past of strategy practice, which is essential for the constitution of strategy practice. Considering strategic planning as an iterative process (Langley and Lusiani, 2015) helps in understanding evolving strategy practice. However, our results suggest that strategy practice is an ongoing *learning* process that stretches over time and creates a continuum. Repeated rounds of strategic planning should not be seen as returning to phase one; they are learning avenues for the future. The implications of this for SAP research are that the past of strategy practice continues to live in future episodes of strategy practice, even if organizations vanish or practitioners change. In this sense, learning is what remains from repeated strategic planning processes and carries on to future strategy practice. Learning is accumulated on past strategy practice, which enables strategy practice to become a continuous learning process. The past can be transmitted to future episodes of strategic planning in the dimensions presented earlier. However, for learning to occur, the past needs to be activated by practitioners in their reflections on past strategy practice.

Our study also has implications for managers and practitioners engaging in strategizing. The results indicate that managers should support practitioners in reflecting on their previous strategy practice to facilitate the learning and evolution of strategy practices. Our results show that, over time, strategy practices are firmly rooted in the organization. The past sticks to current practice and remains, even if practitioners change. Traditions and norms can be interwoven into strategy as a reference for maintaining past practice in a better or worse state. Furthermore, experience is not only a source of learning and renewal but also a part of who practitioners are. Thus, dismissing their past experiences may lead to feelings of rejection (Merriam and Bierema, 2014). Thus, it is important for managers to understand the past and appreciate previous work; otherwise, strategizing may encounter challenges.

Trustworthiness and internal validity in qualitative research arise from several practices (Tracy, 2010). In this study, the interview protocol was discussed in depth and adjusted before conducting the interviews to ensure the thoroughness of the questions and to avoid potential “*leading-the-witness*” questions (Gioia *et al.*, 2013, 19). During the four-stage analysis process, multiple theoretical lenses were used to scrutinize and interpret the data. Therefore, the data were triangulated theoretically to enhance credibility (Merriam and Tisdell, 2016; Tracy, 2010). In the results section, direct quotations were used to achieve a thick description of the phenomenon (Merriam and Tisdell, 2016; Tracy, 2010) and to allow the reader to experience the connection between data and interpretation (Gioia *et al.*, 2013). To ensure research reliability, Gioia *et al.*'s (2013) methodology was followed, and the analysis process was explained in detail. The data structure and database allowed for data tracking and returning to the original data, if needed, during the analysis. However, the literature recognizes the limitations that apply to the present study as well. Kipping *et al.* (2014) emphasize source criticism to ensure the validity and credibility of archival sources. In the current study, the minutes of meetings conveyed official messages and excluded informal discussions regarding strategic planning. The organization followed formal decision-making structures, and the meeting minutes were approved by the participants, which supported their credibility. Furthermore, the archival data were close to the actual strategic planning, which enhanced the credibility of the sources in answering the research questions (Kipping *et al.*, 2014). However, archival data are incapable of describing reality completely, objectively,

or fully comprehensively (Kipping *et al.*, 2014; Mills and Mills, 2018). On the other hand, among historians, interview data are criticized as being biased toward whatever actors prefer to highlight (Yates, 2014), representing individual or organizational preferences (Kipping *et al.*, 2014). These methodological challenges were taken into account, and archival data were triangulated with the interview data (Ericson *et al.*, 2015; Yates, 2014). Regarding transferability and external validity, the results of this qualitative study are not generalizable to other contexts, but they do provide analytic generalizations (Yin, 2014) and relevant principles (Gioia *et al.*, 2013) to the SAP literature.

Our study opens up interesting avenues for future research. Jarzabkowski *et al.* (2007) emphasize the meaning of analyzing the social dynamics at different levels. First, because short-term strategic planning is decentralized, informal and based on practitioners' expertise in strategic planning, future studies could provide a multilevel analysis of social dynamics and learning at the macro, meso and micro levels (Jarzabkowski and Spee, 2009). Second, an interpretative historical perspective suggests that history can be used narratively in organizations (Brunninge, 2009; Foster *et al.*, 2017). This perspective could be adopted to scrutinize how the past is used in strategy practice and what the time horizon of the past is. Based on our results, during the annual planning process, the time horizon was rather short. The actual strategy formulation takes place more rarely, and based on our results, practitioners may also look to a more distant past. This means that the time horizon of the past may vary depending on the situation. Third, our results shed light on the importance of reflection for learning in strategy practice. However, reflection is not an axiom that always precedes or follows an activity (Raelin, 2001). Therefore, future studies could scrutinize strategy practice as a reflective practice and explore how reflection occurs before, during, or after the action as well as what are the implications of reflective practice for strategy practice.

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