

## Chapter 20

# How Open Has the Practice of Strategic Planning Been?

## A Qualitative Meta-Analysis of Case Studies

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### ABSTRACT

*With two principles of transparency and inclusiveness, open strategy is a new paradigm in strategic planning. Although the term has recently entered the related literature, there are several practices of strategic planning which used similar approach for strategic and long-range planning. Moreover, openness in both dimensions of transparency and inclusiveness is introduced as continuums (and not a binary state). Considering the above facts, this chapter aims to study previous practices of strategic planning and evaluate the openness of their approach. To achieve this goal, the authors used qualitative meta-analysis approach and searched for case studies of strategic planning in 15 high-ranking journals of management and business. The first search resulted in more than 400 papers and after several rounds of filtering; the authors found 35 case studies which explained case study of the strategy process. This study found five different categories of stakeholders which have already included in case studies as well as seven different activities which they performed as part of strategy process. Moreover, the authors recognized four patterns with regards to transparency of the plan which are open planning process, open plan, open to staff plan, and proprietary plan.*

### INTRODUCTION

According to the survey of management tools and trends by Rigby and Bilodeau (2013), strategic planning was the most frequently used management tool in 2013, and it has also been one of the top tools for more than 10 years (Rigby, 2001). A survey of 548 governmental agencies in the US indicated that 65 percent were using strategic planning in their agencies or had used it, while nine percent planned to start using it in the near future (Berry & Wechsler, 1995). A recent survey of 166 small and medium-sized

DOI: 10.4018/978-1-5225-3012-1.ch020

enterprises in one developing country also indicated that 86.5 percent have used strategic tools, found to be the most common management tools in this context (Kalkan & Bozkurt, 2013).

The concept of strategic planning entered the management and leadership literature at the same time as the strategic management topic in the mid-1960s. The aim of this research stream was to help managers better lead their firms by setting goals. Armstrong (1982, p. 198) defined strategic planning as “an explicit process for determining the firm’s long-range objectives, procedures for generating and evaluating alternative strategies, and a system for monitoring the results of the plan when implemented.”

However, strategic planning research and practice has been the subject of criticism since the 1990s. Mintzberg (1994a), for example, questioned the differentiation between strategy formulation and strategy implementation in the literature and practice. He mentioned the fallacies and pitfalls of strategic planning in another publication, including “the fallacy of detachment”, in which the information barrier between planners and implementers prevents the process of strategic planning in an organisation from advancement (Mintzberg, 1994b). These critiques ended in a new research era in strategic planning (Wolf & Floyd, 2013) with topics such as the decentralisation of the planning process and the role of middle managers became the subject of attention for researchers (Jarzabkowski & Balogun, 2009; Spee & Jarzabkowski, 2011; Vilà & Canales, 2008; Wooldridge et al., 2008).

Among the studies, after 1994, that have investigated the success factors of strategic planning, many have mentioned the increase in the participation of various levels in the planning process as an affecting factor (Aldehayyat & Al Khattab, 2012; Kargar, 1996; Phillips & Moutinho, 1999, 2000).

Highlighted factors, such as decentralisation and the active participation of various organisational levels in the strategic planning process, have led to the development of a new concept in the strategic planning literature, termed open strategy. The concept of open innovation has an especially great impact on the development of this notion (Chesbrough & Appleyard, 2007). This concept entails the two broad principles of inclusiveness and transparency which form a continuum of openness for practices of open strategic planning (Haefliger et al., 2011).

## **BACKGROUND**

The effect of inclusion and transparency on organizational settings has been frequently studied in organizational studies and management science literature. For example, transparency has been studied as an important antecedent to organizational change (Blomgren, 2007; Buchanan et al., 2005; Larrinaga-Gonzalez et al., 2001). The effect of inclusion (and similar terms such as participation) has been studied on various organizational concepts, such as: productivity (Wellins, 1991), change (Pasmore & Fagans, 1992), and organizational commitment (Mayer & Schoorman, 1992).

In the strategic management area, even before the development of the open strategy concept, case studies about the participation of staff in the strategic planning process have been reported. The work of Mitroff et al. (1977) is the first research in this area to study the benefits of staff participation in developing a plan for the year 2000 (25-year plan) in the governmental sector.

However, advancement in Information Technology (IT), especially the set of social technologies known as Web 2.0, made the participation process much easier after 2000 (Haefliger et al., 2011). IBM, for example, used its jam technology in “the strategy jam” project before 2002 (Bjelland & Wood, 2008; Palmisano, 2004), and asked 50,000 of its staff to participate in the strategy process which resulted in about 10,000 posts and comments.

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