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**Strategizing routine revisited:
Theoretical roots, determinants,
and consequences**

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Abstract

Aim/purpose – The aim of the paper is to review the routine aspect in strategizing process exposing strategizing routines. Consequently, the main aim is to enhance understanding of the commonness, meanings and dissemination of the concept and idea of the routine in strategizing process.

Design/methodology/approach – Narrative, thematic literature review method is adopted, representing a qualitative methodology as appropriate because it is useful in pulling routine research and strategizing research together into general format. It helps in presenting two perspectives embraced in this paper by discussing theory and context to provoke thought and even a controversy.

Findings – The conclusions drawn from the presented review explicate the importance of routine in strategy process as well as routine as practice and its associations with workers in strategy.

Research implications/limitations – The research shed light on specific aspects of strategizing routines. The main value added of our paper is that it draws from the extant literature to provide with a comprehensively updated picture of how strategy-as-practice and routine theory can serve, as a useful research approach, to the studies about strategic choice. The presumable limitation is due to methodology adopted.

Originality/value/contribution – The paper exploits two important management approaches in order to explicate organizational behavior, especially strategy process and strategizing, by investigating organizational routines. Thus, routine appears an adequate natural fundament since routines grasp systematic and endogenous character of the or-

ganization. Therefore, the concept of organizational routines is one to consider in the strategy research, to indicate the role that routines have in the process of strategizing in specific.

Keywords: routine, strategizing, strategizing routine, practices.

JEL Classification: L21.

1. Introduction

Strategic management field is very fragmented, and researchers more and more tend to specialize in particular domain of the field. As a result, strategic management field is disintegrated. Consequently, there is a need for going back to the core aspects of strategic management as strategy content, strategy formulation and implementation. However, we observe that there is a tendency for looking for novelty in the field or even for not studying the same things even twice instead doing basic research in strategic management.

As has been stated by Whittington (2006), there are three interlinked concepts of the strategy-as-practice perspective: strategy praxis, strategy practices and strategy practitioners.

Looking at the seminal work of Nelson & Winter (1982) there are two routine levels, namely operational and generic one. Operational routines are associated to the ways organization uses existing resources whether generic routines exemplify how the organization adjusts existing resources in response to environmental changes. By adopting this perspective into the strategic management practice, it is almost natural that generic routines are those existing on the strategic level.

There is nothing surprizing that top managers and other members of dominant coalition influence strategic orientation of the organization (Child, 1972). They make decisions, including strategic one. Strategic decisions and subsequently strategic changes we perceive as highly dependent on leadership, decision-making procedures, communication and perhaps many more factors. In practise, there are many more individuals and bodies involved in strategic process accordingly to research related to upper echelon theory (Hambrick & Mason, 1984), strategic leadership theory (Finkelstein, Hambrick, & Cannella, 2009), or open strategy approach (Whittington, Caillaud, & Yakis-Douglas, 2011) at least.

Overall, strategy process is under influence of many individuals and groups inside the organization; hence, there is a need to make attempt to study strategizing process rather than strategy process (typically associated with strategy formulation). On the other hand, an enormous part of the activities performed in

organizations is fulfilling in routinized ways. Thus, organizational routines look as a central unit of exploration that is typical or even idiosyncratic (Feldman & Pentland, 2003) for an organization. In order to understand an organization and its behavior, including strategy process and strategizing, investigating its routines thus appears an adequate natural first point since routines grasp systematic and endogenous character of the organization. Therefore, the concept of organizational routines is one to consider in the strategy research, to indicate the role that routines have in the process of strategizing in specific.

On this premise, in this paper we provide with a review about the routine aspect in strategizing process. As we explain in this paper, there are two research streams producing valuable knowledge in terms of conceptualization and methodology. They shed light on specific aspects of strategizing routines. The main value added of our paper is that it draws from the extant literature to provide with a comprehensively updated picture of how strategy-as-practice and routine theory can serve, as a useful research approach, to the studies about strategic choice in particular, and about strategic management in general. This article contributes to the development of a routine theory and strategy-as-practice theory by incorporating and specifying nature of organizational routines to the strategy process explicating that organizational routine should account for the strategy process, in order to take appropriate account for strategizing routine.

Thus, the remainder of our review is as follows: we first synthesize the construct of strategizing. We then focus on the routines conceptual developments evolving over time. In this section, we provide explanations regarding features of organizational routines, positive effects on organization, and routines and practices associations. Then, it comes the description of the method and procedure adopted. We finally present a concluding synthesis linking routine concept with strategizing process. On this part, our discussion of the most significant aspects in strategizing circulates around strategic change, roles of managers in strategizing process, and internal and external path dependency in strategizing routines.

2. Literature review

2.1. Strategizing. Practice approach

Strategists make, shape and execute strategy. They execute the strategies and undertake the strategy practices (Whittington, 2006).

There are many strategy meanings. For our purposes strategy is not something that an organization has but something its members do (Johnson, Melin, & Whittington, 2003). As a replacement for belongings of an organization, strategy is conceptualized as a situated, socially accomplished activity (Johnson et al., 2003). Johnson et al. (2003), based on such understanding of strategy, announce the term of strategizing to designate the doing of strategy. Consequently, it moves research interests to the micro-level phenomena. The concept of strategizing highlights the processual disposition of strategies that are performed through the practices undertaken by organizational members. From this perspective, an effective strategy is not a static capability or a stable disposition of an organization as typically stressed in current management research. Strategy reasonably involves a dynamic element because it is as a process of strategizing and an ongoing social accomplishment, constituted and reconstituted as actors engage the world in practice (Orlikowski, 2002: 249).

This argumentation meets Finkelstein et al. (2009) claims. In his opinion, there is a need to bring back the human element to strategic management research. Therefore, research should be oriented on understanding what managers, especially top, do and how they might do it better. Successful leadership is that which enables executing strategizing.

In general then, the sense of 'strategizing' is the 'doing of strategy', and this involve focusing more deeply on human activity in the strategy research more unequivocally.

Strategizing refers to different practices and processes influencing strategy process including planning, resource allocation, controlling practices and processes enabling the organization to react to various ever-changing or conflicting external demands (Jarzabkowski & Fenton, 2006).

It turns the attention to the theory of practice. As Whittington (2006) states there are three interlinked concepts of the strategy-as-practice perspective: strategy praxis, strategy practices and strategy practitioners. One of the reason for conceptualizing strategy based on the assumptions of a theory of practice is to concentrate deliberations specifically on organizational and strategizing routine and routinizing elements, that, as Whittington (2006) claims have so far been rather ignore by researchers. Routine aspects in strategy are unequivocally concerned with the formation or formulation of deliberate strategy, often involving radical change. However, obviously, we keep in mind that strategies cannot be generated unintentionally.

Going back to strategizing process, this research approach extends the scope of strategic studies concerning strategic choice made by top management because it goes beyond top managers, their decision-making and the formulation

of strategies. It also goes beyond CEOs, top executives, top managers, boards, Top Management Teams, and even top management groups. It concerns also on the strategy implementation process realized through a broader group of important strategists on the level of middle management and the operational one as well as external actors like strategy consultants. These actors may not have a formal strategic role in the firm, but they actually construct the every-day strategy practices through their individual identities and specific experience of being a strategy practitioner. No longer, upper echelon theory and subsequently strategic leadership theory, which, in the words of Finkelstein et al. (2009) focuses on the executives who have overall responsibility for an organization – their characteristics, what they do, how they do it, and particularly, how they affect organizational outcomes is sufficient in explaining strategizing process. Hence, strategists can we call workers in strategy today. Strategizing is based on strategic technologies. Therefore, to understand this process there is a need to know strategic technologies.

Strategy making has been consider as an organization-wide phenomenon. Nonetheless, mainstream strategy research has concentrated on top managers (Nag, Hambrick, & Chen, 2007) as responsible for strategy making. Although strategy-as-practice research has extended the focus including several kinds of workers in strategy. Barton & Ambrosini (2013) contend that middle managers' involvement in strategic decision-making positively relates to their strategy commitment. This makes step forward from strategy formulation to strategy implementation and, subsequently, to strategizing process.

Typically, strategists have a lot of information when making the right decisions, but unfortunately strategic choices often mirror their views on the nature of strategy and how it should be formulated. Differences in perspective not only occur among specific managers, but also across groups of managers, and groups of people involved in the process including those at various levels of management. Specifically, there is a supposition that lower middle, and upper-level managers – as well as non-managers – may not share theoretical assumptions of the strategy process due to essential differences in experiences and responsibilities related with their positions in the organization.

As supposed, the experience allows strategists to better understand and integrate ambiguous information to introduce strategic change (Neill & Rose, 2007). Nevertheless, there are some studies indicating that managers count on ambiguous information when making non routine decisions (Perkins & Rao, 1990). However, studies of routines within strategy are occasional, and those that have happened have inclined to treat routines as stable and fixed, or as only a marginal topic.

2.2. Organizational routines concept

Concept of organizational routines is central for our analysis of strategizing routines. The importance of organizational routines in strategizing is analyzing first by introducing a compact outline of the organizational routines research.

The existing literature on routine is very divergent, offering even contradictory approaches. However, an essential definition is recognized. Most researchers agree based on Feldman & Pentland work that organizational routines can be defined as repetitive, recognizable patterns of interdependent actions, carried out by multiple actors (Feldman & Pentland, 2003: 95).

Hansen & Küpper (2008) differentiate eight aspects as main features of organizational routines. Following this research, routines are activity patterns (1) that are recurrent (2) and collective (3) recurrent activity patterns are mindless or mindful respective effortful accomplishments; (4) routines are processes (5) that are context-dependent, embedded and specific (6); their development is path-dependent (7) and routines are triggered (8).

In the vein of research on routines, there are arguments for routines have several positive effects on organizations. Extensive literature review presented in (Becker, 2004) indicates that routines have the power to coordinate and to control (1); routines provide the participants with concrete instructions and establish an implicit truce (2); between organizational members, organizational routines economize on the limited cognitive resources (3); reduce uncertainty (4). Becker (2004) on his own identifies two additional positive effects of organizational routines: stability (5) and storing knowledge (6).

There is also extensive discussion concerning inert nature of routines (Pentland, Hærem, & Hillison, 2011). For instance, there are arguments concerning the self-reproducing nature of routines, which makes them intrinsically resistant to externally introduced change (Grinyer & McKiernan, 1990). Although, in general, there is an agreement on organizational routines due to their processual character. Consequently, routines are not inert because of internal dynamics (Pentland & Feldman, 2007).

Deep review of the research on routines shows that, in general, routines are studying as specific practices.

The practices strategists use when they are strategizing. In the line of deliberations presented by Whittington practices are “[...] the shared routines of behavior, including traditions, norms and procedures for thinking, acting and using ‘things’” (2006: 619), this last in the broadest sense. In this sense, practices are recognized as being routines. Reckwitz (2002: 249) defines practices as routinized types of behavior which consist of several elements, interconnected to one

another: forms of bodily activities, forms of mental activities, 'things' and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge. The implementation of such practices inherently relates to doing because they provide the behavioral, cognitive, procedural, discursive and physical resources through which various actors are able to interact in order to complete an activity. Practices involve use of resources in routinized ways that form patterns. Patterns may be useful to understand how strategic activity is undertaken. Hence, there is strict connection between organizational routines and organizational practices. At least due to their collective character. What is more important, Jarzabkowski & Sillince (2007) emphasize that, regardless of their routinization, practices are not unchanging over time or unable to be changed. In addition, practices follow in rough and organized ways, intervened by the demandingness of the context. Therefore, it is possible, even when practices have routinized character, to overcome defenses, i.e., defensive routines. Following Argyris (1985), there is a need for identifying the individual and organizational defensive routines. There is also a need for recognizing how they inhibit organizations from detecting and correcting errors – and from knowing when they are not able to do it. Determining what individuals can do to correct and reduce defensive routines and achieve maximum potential is essential.

Above considerations show that there is a relation between routine concept and practice concept and substantiate the analysis from a practice theory perspective how routines influence strategy process.

3. Method and procedure

In order to enhance understanding of the commonness, meanings and dissemination of the concept and idea of the routine in strategizing process in management and organization studies, we performed a narrative review of the published research. Our choice of a narrative literature review was motivated by two reasons: to increase transparency; and to establish a foundation for the subsequent analysis of strategizing routine in empirical research (Rocco & Plakhotnik, 2008). Narrative literature review as a qualitative one is appropriate hence; it is useful in pulling routine research and strategizing research together into general format. It is helpful in presenting two perspectives adopted in this paper by discussing theory and context to provoke thought and even a controversy.

Reviews of selected literature serve an important purpose of integrating often-disparate research conversations. To be effective review it goes further by adding to the literature by providing new perspectives and identifying potentially

productive paths for future research. Finally, the efforts provide to study the work of the leading authors in research field providing familiarity with the major topics relevant to that subject area. Naturally, we bear in mind that we are reviewing the literature in order to develop more insightful and focused research questions about topic. Finally, a narrative review adopted here, summarizes different primary studies from which conclusions may be drawn into a complete interpretation contributed by the author's own experience, existing theories and models. Results are of a qualitative rather than a quantitative meaning.

In addition, as this method is also thematic reviews of literature that it tends to break away from chronological order. It shifts between periods within each section according to the point made. This kind of method meets the same standards as primary research concerning clarity, rigor, and replication. This is the most common form of review in the social sciences (Hart, 1998; Petticrew & Roberts, 2006).

Finally, we bear in mind a limitations of method adopted, mainly comprising subjectivity in the determination of which papers to include, the way the studies are analyzed, and the conclusions drawn; due to selection bias the possibility of misleading in drawing conclusions, unspecified inclusion criteria, and failure to consider the relationships between study characteristics and study results.

Therefore, to avoid limitations, this paper adheres methodological rigor when writing exploiting expert knowledge in the fields. Hence, as a narrative review is adopted it should make the search criteria and the criteria for inclusion explicit. Following this, we comprised only peer-reviewed journal articles in which routines and strategizing was a core concept. We focus on well-known journals in order to ensure that papers included were of high academic quality. Thus, we excluded papers that mentioned those terms only in passing and with no deeper description of its idea and relationships between them. We excluded papers concerning on secondary issues that did not specifically relate to routines in strategic process because these papers did not address strategic implications. We included papers written in English for the replicability reasons important to state dominant research. We excluded related literature review or narrative analysis of routines and strategizing, although, those papers are useful to frame the discussion. After examining the papers from the initial selection phases and then excluding those that did not meet our criteria, journal articles listed in the references section remained.

With that in mind, we review routines studies within the organization and management literature, inspired by Darwinism to account evolutionary approach of routines as well as practice perspective in exploring routines. The articles selected for reviewing strategizing represent a novel and interesting direction in the research on strategy process representing findings of strategy-as-practice researchers.

4. Results

Nelson & Winter (1982), who advocated that the long-term progress of an organization, and subsequently its strategy, be ruled by specific types of routines, instigated the idea of strategizing routines. These routines are firm – specific, i.e., idiosyncratic, because they vary from one organization to another. Strategizing routines in specific refer to the organizational routines that shape the way the organization formulates and reformulates its strategic path over time. While the idea that the organizational development is based on specific routines is not new, there has been little theoretical and empirical investigation of the nature of these routines (Menuhin & McGee, 2014). As mentioned earlier, strategizing refers to the doing of strategy. That is, strategizing is a stream of activity exemplifying the actions and interactions of various actors and the practices they induce (Jarzabkowski, Balogun, & Seidl, 2007).

Research indicates that in practice managers apply different strategizing practices (Jarzabkowski, 2008). Those practices are discursive and legitimizing (Paroutis & Heracelous, 2013) and they influence deliberate strategies. Additionally, managers implement their apparently deliberate intents constantly as the reaction to the strategies that arise from the independent activities of managers at various levels of the organization. According to Hendry & Seidl (2003), there is a question of how strategy routines of an organization relate to the generation of strategic change.

Up to date research has little contribution concerning the nature of strategizing routines. Moreover, there is almost nothing in explaining how the strategizing routines essentially alter organizational strategy. Even then the concept of strategizing routine have acceptance in the research, the character of the processes and the way in which they impact strategy making in organization has not been explored and explained.

We assume that the concept of organizational routines has the great impact on organizations in general and on the process of strategizing in specific. One rationale for this assumption lies in that a great part of the activities undertaken in organizations is realized in routinized ways.

Accepting the role organizational routines play in the process of strategizing we highlight the importance of construction and replication of strategy practices. The routinization of strategies plays most important role because it confirms stability and steadiness in strategy practice and gives safety for the strategy practitioners. Nevertheless, remains question concerning strategic change.

Still, the concept of strategizing routines provoke the questions concerning organizational stability and change. Strategic decision-making typically is a result of confrontation with complexity. Obviously, strategists implement strategy routines

when making strategy. Strategists follow a strategy-making routine when formulating a strategy. However, in practice, they have two options. They can create a new strategy routine and they can adapt old strategy routines in the strategy process.

Seidl (2007) underlines that strategists select a routine from a set of practices and adapt its use to their specific contexts. In addition, Howard-Grenville (2005: 619) argues that routines have never been performed in an empty space, but are sanctioned within organizational and individual contexts. Each performance of a routine differs, relatively because contexts are not stable and are constantly changing, and relatively for the reason that aims are changing as well as motivations.

Moreover, there are arguments showing that the same strategy routine is not used in dissimilar strategic situations. New situation involves somewhat different practice to perform. In some cases, it involves revolutionary different enactment (Seidl, 2007: 198). This means a strategy practice is a unique manifestation appropriate in specific situation.

Each organization is unique and it operates in specific circumstances. Thus, its routines reflect as 'typical' for an organization. Accordingly, in order to understand an organization and its behavior, studying its routines thus appears a proper initial step since they exemplify systematic and endogenous character of the organization.

Overall, both research streams, one of routines and another of strategy have called for research that locates individuals at the center of study to humanize these socially embedded units (Jarzabkowski et al., 2007). By incorporating the individuals who are participant in the routine with the routine itself, a better explanation of how individuals strategize is going to be formulated.

5. Discussion

Strategy change involves changing of routines and practices. As organization must change strategy, similar changes must take place at various levels including individual one. Attention should be diverted to individual changes in routines and practices, not just organizational changes, because both levels interact one another. This process is the evolution of individual changes, group changes and organizational changes. That is, individual changes promotes group changes, which eventually results in organizational changes.

In specific, top managers play central roles in the process of strategic change. If CEOs or executive managers change their routines, it may have impacts on the routines of middle managers and staff employees. The upper echelon perspective assumes that top executives influence organizational perform-

ance through their personal characteristics and behaviors (Hambrick & Mason, 1984), and that top management teams collectively have the skills that determine their performance (Coad & Timmermans, 2014). Thus, the abilities of executive managers to change strategizing routine may have a key effect on organizational routines because these individuals have decision-making authority to enact and acknowledge changes in organizational routines.

There is a need for including in the debating path dependency approach in the explanation of strategizing routines changes. Researchers, in general, agree about the sources of path dependencies in strategizing routine stemming from internal organizational routines (Nelson & Winter, 1982). For example, research has shown how routines based on a company's prior knowledge base, and prior experience can limit its ability to implement strategic change. However, research has not fully investigated the possibility that even after a company overcomes these internal obstacles and successfully uses new routines; it may still meet substantial externally driven path dependencies. Strategizing routine change is under impact of changing the organizational characteristics, such as anticipated external requirements.

Because organizational routines are shaped, among others, by learning and experience, the negative effect of new routines may be moderated by different characteristics of organizational unique histories.

Our review illustrate of how, in the internal contexts, the external context may influence organization facing a tension between old strategizing mode and new one. Existing research shows the internal path dependencies that hinder organization's efforts to apply new routines. In contrast with it, we suppose that even when organization overcome internal path dependency and successfully use new strategizing routines, they are still uncovered to external path dependencies that may hamper its efforts to changes. We suppose also, that path dependencies in surroundings can make different reactions differently to the same organization when deciding whether to provide old strategizing routine or novel one. Therefore, the conclusion is that important heterogeneities exist in organization that can influence their strategizing practices in the certain place and time.

6. Conclusions

6.1. Research contribution

In this paper, we make attempt to build on the achievements of the strategy-as-practice perspective and the theory of organizational routines by undertaking a practice-orientated aspects of strategizing routines.

Routines are not just, what we remember and what is done in repeatedly; they also need to withdraw to be useful. Strategy is more as a matter of emergence rather than managerial intention. Overall outcomes in terms of content and firm performance are a managerial responsibility (Jarzabkowski, 2005: 5). This review paper pointed out some of the routine practices and their potential effects on strategizing. Future research could empirically explore how strategy practices, i.e. routines, actually affect the changes of strategy. This paper contributes to strategy literature by explicating the influence of organizational routines on strategizing practices. It also highlights the important roles of the internal and external path dependencies in changing strategizing routines and finally strategy. On the one hand, we have the developments that are related to the strategy-as-practice perspective (Jarzabkowski, 2005; Whittington, 2006; Jarzabkowski et al., 2007), while on the other hand there are the developments of a theory of organizational routines (Pentland & Feldman, 2007).

In the case of the strategy as practice perspective, a focus is towards practices of strategizing (Johnson, Langley, Melin, & Whittington, 2007). In the case of the theory of routines, the lesson has been learn concerning dual nature of routines and factors determining their duality (Pentland & Feldman, 2007).

Summing up, this article contributes by explicating organizational routines and their links with the phenomena of strategizing. By incorporating and specifying nature of organizational routines to the strategy process, we contribute to the development of a routine theory as well as strategy as practice theory.

The most significant implication of the review is that investigations into the organizational routines should account not only the inert nature of it but also the strategy process, in order to take proper account of strategizing routine.

6.2. Research implication

There are number of implications for researchers that we can draw from presented research. First, the research explicates that both approaches adopted here are similar on a number of understandings. They reach agreement that interest needs to be turn into the research of practices and performances, away from a priori conceptualizations of constructs that are either difficult to operationalize for research or empirically hard to find (Johnson et al., 2007). They also are similar in the assumption that ontological and epistemological questions lie at the center of our understanding of strategizing practices. Moreover, there is one more similarities concerning the role of routines in strategizing practices and the need to take it into account in the future research (Feldman & Pentland, 2003; Jarzabkowski, 2005; Johnson et al., 2007).

Secondly, It is also worth to note that both approaches in recent years have tend towards methodology that is known as actor-network theory, recently (Feldman & Pentland, 2003; Johnson et al., 2007; Pentland & Feldman, 2007).

The emergence of ‘open strategy’ (Whittington et al., 2011), i.e., strategizing practices aimed at including more internal and external stakeholders and communicating strategic choices more transparently challenges traditional assumption concerning vital top management role in strategy process.

Taking into account all considerations presented here it seems that questions regarding who is doing the strategizing (e.g., operational, middle or top managers) and how they do it, remain unanswered.

This review paper has some managerial considerations. Because exploration of strategy as a form of practice may be beneficial for strategy practitioners, called workers on strategy, by shedding the light on the routines in which they are engaged and technologies they used by means of strategizing they need to know strategic technologies and its consequences.

6.3. Research limitation and future works

There are important and noteworthy limitations with the study presented here. First, it is associated to methodology adopted. We implement narrative review that only cover journal articles. There are probably several accounts that would have been included in our sample. Second, we cover journal articles found primarily in databases in management and organization studies.

We hope that future reviews will amend these shortcomings by including more practice state of the art covering research results. Furthermore, subsequent studies might be intending to address more detailed research model and empirical research, finally.

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