

# Strategic Planning Research: Toward a Theory-Driven Agenda

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*This review incorporates strategic planning research conducted over more than 30 years and ranges from the classical model of strategic planning to recent empirical work on intermediate outcomes, such as the reduction of managers' position bias and the coordination of subunit activity. Prior reviews have not had the benefit of more socialized perspectives that developed in response to Mintzberg's critique of planning, including research on planned emergence and strategy-as-practice approaches. To stimulate a resurgence of research interest on strategic planning, this review therefore draws on a diverse body of theory beyond the rational design and contingency approaches that characterized research in this domain until the mid-1990s. We develop a broad conceptualization of strategic planning and identify future research opportunities for improving our understanding of how strategic planning influences organizational outcomes. Our framework incorporates the role of strategic planning practitioners; the underlying routines, norms, and procedures of strategic planning (practices); and the concrete activities of planners (praxis).*

**Keywords:** *strategic planning; planning practices; planning practitioners; planning outcomes; strategy-as-practice*

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Despite the fact that strategic planning is one of the most widely used management tools in contemporary organizations (Rigby, 2001; Rigby & Bilodeau, 2011; Whittington, 2006;

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Wilson, 1998), the number of research publications in highly ranked academic journals on the subject has dropped significantly since the early 1990s. Looking at publications in the *Strategic Management Journal*, for example, as one of the leading outlets for strategic planning research, we counted 32 articles published between 1980 and 1989 but only 9 articles published since 1990 and only 1 since 2000. This apparent inconsistency between strategic planning popularity in practice and its decline in the academic domain raises questions: Do we really understand how and why strategic planning is practiced so widely? Do we know what the benefits of planning are and how successful planning is practiced?

A recent study suggests negative responses to these questions. Although it is widely practiced, only 11% of managers responding to a large survey expressed satisfaction with the results of strategic planning (Mankins & Steele, 2006). Ambivalence toward planning may also be reflected in the academic literature. Notwithstanding a multitude of studies, empirical evidence for a positive relationship between planning and firm performance remains inconclusive, particularly with respect to the role of environmental and organizational contingencies in this relationship (e.g., Andersen, 2000, 2004; Hopkins & Hopkins, 1997; C. Miller & Cardinal, 1994; Powell, 1992).

Although important questions remain about how strategic planning contributes to organizational performance, research provides ample reason for believing that it contributes to other important outcomes. Studies suggest that strategic planning plays an important role in strategy development, including how organizations formulate major problems, set objectives, analyze alternatives, and choose strategy (e.g., Armstrong, 1982; Dutton & Duncan, 1987; Hopkins & Hopkins, 1997; C. Miller & Cardinal, 1994; Powell, 1992; Shrivastava & Grant, 1985). Strategic planning has also been identified as a key mechanism for integration and coordination and as a basis for both centralizing and decentralizing organizational decision making (Andersen, 2004; Grant, 2003; Jarzabkowski & Balogun, 2009; Spee & Jarzabkowski, 2011). The fact that so many firms have not been successful in capturing the benefits of planning, however, and that research has been inconsistent in connecting planning to organizational performance, suggests the need to review and catalogue what we know about strategic planning and to consider new directions for future research.

The purpose of this article is to analyze the changing nature of strategic planning research since the 1980s. The review incorporates research conducted over the past 30 years and ranges from the early development of the classical or normative model of strategic planning to recent empirical work on the more intermediate outcomes of planning, such as the integration of functional orientations among managers and the coordination of subunit activity. In contrast to past reviews focusing on the relationship between strategic planning and organizational performance (e.g., Armstrong, 1982; Boyd, 1991; C. Miller & Cardinal, 1994; Pearce, Freeman, & Robinson, 1987), we incorporate a diverse range of topics, such as who is involved in planning, how planning accommodates emergent influences, and whether differences in how planning is practiced influences important outcomes. In addition to a broader range of topics, this review has the benefit of the more socialized perspectives on strategic planning, including research on planned emergence (e.g., Grant, 2003) and strategy-as-practice approaches (e.g., Giraudeau, 2008; Jarzabkowski & Balogun, 2009; B. King, 2008; Nordqvist & Melin, 2008). Thus, in synthesizing recent work and developing recommendations for future research, the article draws on a broader range of theories than previous

reviews, leading to a more comprehensive description of strategic planning and what we hope is a more thorough explanation of its potential influences on strategy formation and organizational performance.

## Method

Given the timing of prior reviews (Armstrong, 1982; C. Miller & Cardinal, 1994; Pearce, Freeman et al., 1987; Robinson & Pearce, 1984; Shrader, Taylor, & Dalton, 1984), we decided to provide only a brief summary of research published prior to 1994 and to focus instead on reporting more detailed information for articles published after 1994.

Three considerations motivated the choice of 1994 as the point in time used to mark the beginning of a more detailed review. First, although it is difficult to identify definitive trends, 1994 appeared to be a turning point in the scholarly conversation about strategic planning. Until then, the focus of most academic research was on the relationship between strategic planning and the financial performance of organizations. C. Miller and Cardinal's (1994) meta-analysis of the association catalogued this work. While their conclusion that a positive, if modest, relationship exists between planning and performance may not have entirely settled the matter, it did seem to reduce the motivation for further work. Second, Henry Mintzberg published a widely read book (Mintzberg, 1994d) and related articles (Mintzberg, 1994a, 1994b, 1994c) in 1994 chronicling the "fall" of strategic planning. The substance of his critique (that real strategy is not produced in strategic plans) resonated with the dynamics in the business world at that time, and this, too, seemed to reduce the motivation to study strategic planning. In addition to these milestones in the literature, our review offered objective evidence of a relatively steep decline in the number of strategic planning studies appearing in highly ranked academic journals that began at about that time. For example, while we counted about four articles on average being published each year from 1980 to 1994 in the highly ranked academic journals in our sample (in some peak years, seven or more were published), the count drops to only one or two per year after 1994 and even fewer after the year 2000.

### *Article Sampling*

Our search for articles was guided by the fact that we wanted to provide a finer-grained picture of strategic planning research in the later period of our analysis (1994-2011). In addition, we were aware that the number of studies published in leading academic journals began to diminish in the early to mid-'90s. In combination, these considerations led us to expand the scope of our review of the later period (post-1994) to include leading journals whose target audience includes practicing managers. For the academic journals, however, we extended the search for articles back to 1980 in order to complement the information in previously published planning reviews and to gain a historical perspective for the current review. This point in time was chosen for the academic articles because it marks the beginnings of the *Strategic Management Journal*, the most prominent source of academically oriented articles in subsequent years. In total, this process led to the identification of 117

journal articles considered in the review: 65 articles representing the period between 1980 and 1993 and 52 articles representing the period between 1994 and 2011.

To identify the *academic* journals to be included, we used the Social Science Citation Index (SSCI) impact factors in combination with reputational rankings published during the review period (J. Johnson & Podsakoff, 1994; Podsakoff, MacKenzie, Bachrach, & Podsakoff, 2005). This approach weighs both recent and longer-term influence. We used the SSCI for 2000 and 2010 to identify (academic) management journals scoring 1.5 or higher in 2000 and/or 2010. We compared this set with journal rankings reported in J. Johnson and Podsakoff (1994). From this group of journals, we eliminated those in domains adjacent to management, such as marketing or finance. Then, we scanned all of the remaining journals for studies of strategic planning and dropped journals when there was none. Using similar criteria, we selected four practitioner journals (*California Management Review*, *Harvard Business Review*, *Long Range Planning*, and *Sloan Management Review*) to be included with our post-1994 review (along with articles from the academic journals).

Articles were identified by a keyword search for the terms *strategic planning* and *planning* in the title of articles. Searching for articles with *planning* in the title ensured that we did not miss articles using terms such as *long-range planning*, *corporate planning*, or *business planning*. To keep the review focused on formal strategic planning processes as a distinct form of strategy formulation, however, we deliberately excluded more general terms, such as *strategic decision making* and *strategy formation*, and very specific planning tools, such as *scenario planning*, in the keyword search. Each of these falls within the broader strategy process domain and therefore is connected to strategic planning in some way (e.g., decision making often occurs as a part of the strategic planning process; scenarios are often used in the planning process). Such constructs stretch beyond the boundaries of strategic planning, however; for example, in the case of strategic decision making, strategic planning represents only one context among others (e.g., political and emergent processes) where strategic decisions are made (Hart, 1992; Sinha, 1990). In addition, our examination showed that articles where such topics were prominent in the title or keywords rarely even mentioned strategic planning, and when they did, it was usually in the distant background. Moreover, including articles on such topics would mean broadening the scope of the review in ways that would lead to more heterogeneity than could reasonably be synthesized in a single review. Put differently, we were interested in an in-depth examination of research focused specifically, if not exclusively, on the phenomenon of strategic planning, and in order to accomplish this, it was necessary to draw clear boundaries.

### *Definition and Refinement of Article Sample*

There are several overlapping and consistent definitions of *strategic planning* in the literature. What most definitions have in common is the emphasis on a systematic, stepwise approach to strategy development (e.g., Armstrong, 1982; Ocasio & Joseph, 2008). Schendel and Hofer (1979) describe strategic planning as a series of logical steps that includes the definition of a mission statement, long-term goals, environmental analyses, strategy formulation, implementation, and control. Armstrong highlights that “formal strategic planning

calls for an *explicit* [emphasis in original] 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" (Armstrong, 1982: 198; see also Boyd, 1991). Similarly, Ketokivi and Castañer (2004) describe strategic planning as a periodic process that includes activities such as annual assessment of performance goals, budgeting, and translating priorities into resource allocation decisions. Hopkins and Hopkins (1997: 637) summarize the definition of formal strategic planning as "the process of using systematic criteria and rigorous investigation to formulate, implement, and control strategy, and formally document organizational expectations."

We define strategic planning as a more or less formalized, periodic process that provides a structured approach to strategy formulation, implementation, and control. The purpose of strategic planning is to influence an organization's strategic direction for a given period and to coordinate and integrate deliberate as well as emerging strategic decisions. Strategic planning comprises a range of different activities designed to fulfill this purpose (such as strategy reviews, meetings, generation of strategic plans, etc.); the extent to which such activities are governed by explicit rules and procedures, that is, the degree of formalization (Hage & Aiken, 1969), varies both within and between organizations.

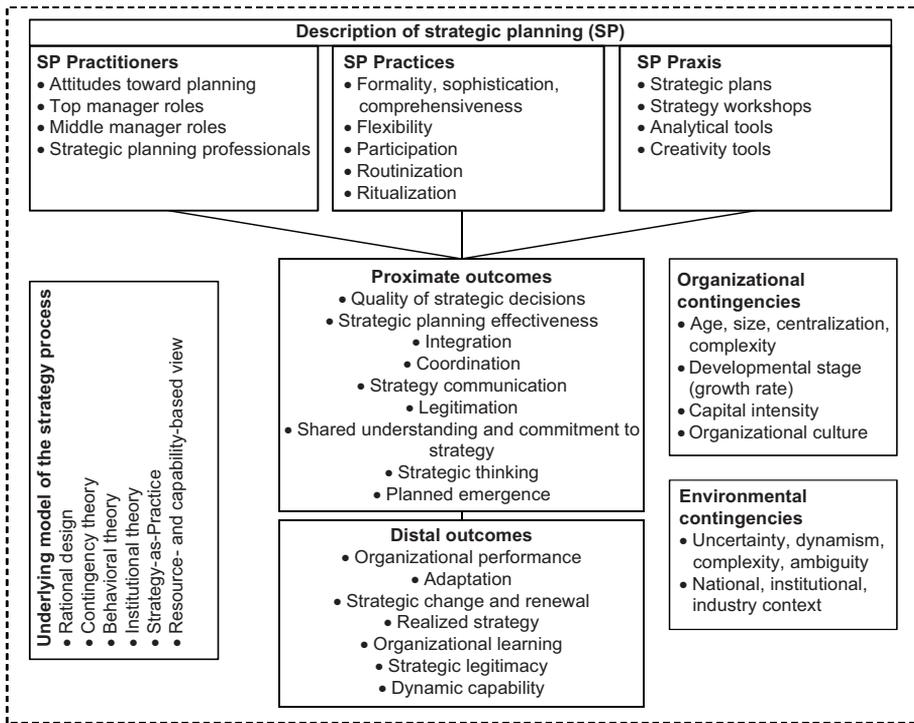
On the basis of this definition, we refined the list of articles produced by an electronic search by eliminating all that, upon closer examination, did not fit our scope, for example, those focusing on narrow topics, such as marketing strategy or financial strategy. We also eliminated articles where the content was either editorial or commentary. For the purposes of elimination, the first author went through the list of articles and made suggestions for those to be omitted. This choice was then validated by the second author.

### *Analysis of Articles*

To analyze the sample of articles, we proceeded as follows. First, we sorted articles by their year of appearance and sought to identify trends with respect to topics, methods, and types of papers in different time spans as well as the distribution of articles over the time span reviewed. We coded articles according to key topics addressed, method and research context, theoretical perspective applied, research focus (including, e.g., variables and level of analysis involved), and key results. In a next step, we sorted papers by major topics and categories of papers distinguishing (a) articles focusing on normative planning models; (b) descriptive articles on how organizations actually plan; (c) articles focusing on the relationship between strategic planning and organizational performance, including those articles that elaborate contingencies in the planning-performance relationship and those that focus on the operationalization of planning; (d) articles elaborating on the role of actors in strategic planning; and (e) previously published reviews.

At this stage of the analysis, we refined the inductively derived organizing framework by incorporating distinctions from Whittington (2006, 2007), namely, strategy practices, practitioners, and praxis. These were combined with the categories uncovered inductively, and the entire set was ordered according to whether elements represented part of the description of strategic planning, proximate and distal outcomes, or contingency variables.

**Figure 1**  
**Mapping the Landscape of Strategic Planning Research**



In categorizing the descriptions of planning as practices, practitioners, and praxis, we borrow terminology from a relatively new theoretical perspective on strategic planning: strategy-as-practice (G. Johnson, Melin, & Whittington, 2003). Drawing from this research stream (Whittington, 2006) for our mapping has the advantage of describing past research in a way that connects with current work and with what we see as productive avenues for future work. Whittington (2006, 2007) distinguishes practices, practitioners, and praxis as a basis for research and as a way to understand the activity of strategic planning.

“[P]ractices” . . . refer to shared routines of behaviour, including traditions, norms and procedures for thinking, acting and using “things” . . . “praxis” refers to actual activity, what people do in practice. Practitioners are strategy’s actors, the strategists who both perform this activity and carry its practices. (Whittington, 2006: 619)

The resulting framework (see Figure 1) enabled a relatively detailed analysis of the literature that captured both historical and more recent topical trends in strategic planning research. The framework should be seen not as a research model itself but as a scheme for organizing ideas in a way that helps describe previous and future research.

Just below the set of boxes that describe strategic planning practices, practitioners, and praxis, the large box in the middle of the figure represents what can be described as the proximate or intermediate outcomes of strategic planning. This group of constructs is important because it identifies the causal or processual mechanisms that explain how strategic planning influences organizational outcomes. The distal outcomes identified in the figure include organizational performance but also a number of other potential products of strategic planning.

Alongside the outcomes, we show two sets of contingency variables. First, for relationships between strategic planning and its more immediate outcomes, conditions within the organization are most likely to be relevant. This is because such outcomes are intrinsic to the organization and are not associated with normative expectations for the organization's success in the external environment. Relationships between planning and more distal outcomes, on the other hand, are conditioned by the environmental context because this set of factors describes the organization's success in the external environment.

### Strategic Planning Research From 1980 to 1993

Until the late 1970s and early 1980s, "most of the published literature on planning is either *prescriptive* (i.e., what ought to be the characteristics of a long range planning process) or *descriptive* (i.e., what is the status of long range planning as it is practiced in organizations today)" (Emshoff, 1978: 1095; emphases in original). Much of the research, especially in the 1980s and early 1990s, focuses specifically on finding empirical evidence for links between strategic planning and organizational performance. Table 1 provides an overview of the articles reviewed for the period from 1980 to 1993.

#### *The Relationship Between Strategic Planning and Organizational Performance*

No other topic in strategic planning research has attracted more attention than the relationship between strategic planning and organizational performance (e.g., Brews & Hunt, 1999; Ramanujam, Venkatraman, & Camillus, 1986). Studies addressing the planning-performance relationship dominate strategic planning debates throughout the 1980s until the early 1990s. This period represents a peak in the volume of publication of strategic planning research (Whittington & Cailluet, 2008). These studies range from assessing a direct link between strategic planning and performance to those examining performance in light of contingencies in the external environment and internal organizational context.

*Distal outcomes of strategic planning.* Our analysis highlights that earlier years of strategic planning research are dominated by a focus on distal outcomes, often in terms of firm performance indicators. For studies assessing the link between planning and performance, for example, organizational performance is most commonly operationalized in terms of financial performance (e.g., Boyd, 1991; Bracker & Pearson, 1986; Guerard, Bean, & Stone, 1990; Kudla, 1980; Pearce, Freeman, et al., 1987; Rhyne, 1986, 1987; Robinson & Pearce, 1983). Overall, the cumulative

**Table 1**  
**Included Articles 1980 to 1993**

Author(s)	Method <sup>a</sup>	Topics <sup>b</sup>
<i>Academy of Management Journal</i>		
Kudla (1980)	2a	DO, P2
Lindsay & Rue (1980)	2a	EC, OC, P2
Boulton, Lindsay, Franklin, & Rue (1982)	2a	EC, P2
Robinson (1982)	2a	DO, P1, P2, OC
Ramanujam, Venkatraman, & Camillus (1986)	2a	P2, PO, OC
<i>Academy of Management Review</i>		
Cosier (1981)	1a	P2
Wu (1981)	1a	P2
Bresser & Bishop (1983)	1a	P2, PO
Chakravarthy (1984)	1a	P2, DO, P1
Robinson & Pearce (1984)	1b	P2, DO, OC
Chanin & Shapiro (1985)	1a	P2
Pearce, Freeman, & Robinson (1987)	1b	DO, P2
<i>Journal of Management</i>		
Shrader, Taylor, & Dalton (1984)	1b	DO, OC, EC, P2
Kukalis (1989)	2a	P2, OC, EC
<i>Journal of Management Studies</i>		
Gibb & Scott (1985)	2a	DO, P1, P2
Javidan (1987)	2a	P1, PO
Rhyne (1987)	2a	P2, DO
Boyd (1991)	2b	DO, P2
Kukalis (1991)	2a	P2, EC, OC
Veliyath & Shortell (1993)	2a	P2, DO, OC
<i>Journal of International Business Studies</i>		
Dymsza (1984)	1a	P3, OC
Kennedy (1984)	2d	P3, OC
<i>Management Science</i>		
Burton & Obel (1980)	2a	P2, PO
Hogarth & Makridakis (1981)	1a	P1, P2, PO
Naylor & Tapon (1982)	1a	P3
Volkema (1983)	2a	P2
Schwenk (1984)	2a	P2, PO
Woo (1984)	2a	P2
Miesing & Wolfe (1985)	1a	P2, EC
Venkatraman & Ramanujam (1987)	2c	PO, P2
Guerard, Bean, & Stone (1990)	2a	P2, P3, DO
<i>Strategic Management Journal</i>		
Burton & Naylor (1980)	1a	P2
Cosier & Aplin (1980)	2a	P2
Leontiades & Tezel (1980)	2a	DO, P2
Ackoff (1981)	3a	P2
Bryson (1981)	3a	P3
Bazzaz & Grinyer (1981)	2d	P3
Higgins (1981)	2a	P2, OC
Leontiades & Tezel (1981)	2a	P1, P2, OC
Mahon & Murray (1981)	1a	P2, EC
Wood & LaForge (1981)	2c	P2
Armstrong (1982)	1b	P1, P2, DO

(continued)

**Table 1 (continued)**

Author(s)	Method <sup>a</sup>	Topics <sup>b</sup>
Camillus (1982)	1a	P2
Dyson & Foster (1982)	2a	P2, PO
Lyles & Lenz (1982)	2d	P1, P2, PO
W. King (1983)	1a	P2, PO
Robinson & Pearce (1983)	2a	P2, DO
Barnes (1984)	1a	P1, P2, PO
Javidan (1984)	2a	P2, EC
Nutt (1984)	1a	P2, OC
Rhyne (1985)	2a	P2, OC, EC
Bracker & Pearson (1986)	2a	P2, DO
Grinyer, Al-Bazzaz, & Yasai-Ardekani (1986)	2a	P1, P2, OC
Rhyne (1986)	2a	DO, OC
Boal & Bryson (1987)	2a	P2, PO
Chakravarthy (1987)	2a	P2, EC, OC, PO
Das (1987)	2a	P1, P2
Dutton & Duncan (1987)	1a	P1, P2, DO
Pearce, Robbins, & Robinson (1987)	2a	P2, DO, OC
Ramanujam & Venkatraman (1987)	2a	P1, P2, PO
Bracker, Keats, & Pearson (1988)	2a	P2, DO
Odom & Boxx (1988)	2a	P1, P2, EC, OC
Reid (1989)	2d	P2, PO, OC
Sinha (1990)	2d	PO, OC
Powell (1992)	2a	DO, EC

*Note:* Table 1 reports a summary of the analysis of articles reviewed in this article. A more detailed set of tables is available from the first author Carola Wolf (c.wolf@aston.ac.uk).

<sup>a</sup>Method is coded as follows: 1a = conceptual (including conceptualizations of planning models); 1b = review paper; 2a = surveys or experimental data for statistical analyses and testing; 2b = meta-analysis; 2c = scale development; 2d = mixed-method approaches in data collection and analysis; 3a = descriptive case studies and conceptual studies with illustrative case studies; 3b = inductive theory building (e.g., grounded theory); 3c = action research.

<sup>b</sup>Topics are coded using the abbreviations of key terms in Figure 1: P1 = strategic planning practitioners; P2 = strategic planning practices; P3 = strategic planning praxis; PO = proximate outcomes of strategic planning; DO = distal outcomes of strategic planning; OC = organizational contingencies; EC = environmental contingencies.

results on the planning-performance relationship point to positive effects for formal strategic planning, but the range of findings leaves considerable room for ambiguity (e.g., Armstrong, 1982; Boyd, 1991; C. Miller & Cardinal, 1994; Ramanujam et al., 1986). Methodological differences are one important source of inconsistency in the findings (Boyd, 1991). C. Miller and Cardinal (1994) found correlations ranging from  $-0.31$  to  $0.75$  for the relationship between strategic planning and revenue growth and from  $-0.21$  to  $0.71$  for the relationship between planning and profitability. The authors concluded that, on average, strategic planning positively influences organizational performance and that the differences in methodology likely explain the inconsistent findings in the literature.

This research was criticized for ignoring the intermediate outcomes of planning that intervene between planning and organizational performance (W. King, 1983). Such criticism influenced further research in several ways. First, subsequent authors have focused on the more proximate outcomes of strategic planning as potential influences on distal outcomes (e.g., Boal & Bryson, 1987; Higgins, 1981; Hogarth & Makridakis, 1981; Javidan, 1987;

Leontiades & Tezel, 1980; Ramanujam et al., 1986), for example, by evaluating the contribution of planning systems to decision making (e.g., Schwenk, 1984; Sinha, 1990). Second, researchers have related strategic planning to less tangible distal outcomes, including, for example, the influence of strategic planning on strategic change and renewal (e.g., Dutton & Duncan, 1987; Gibb & Scott, 1985). Finally, researchers have introduced external environmental and internal organizational contingencies to research examining the planning-performance link.

*Environmental contingencies.* Following contingency theory logic, a large number of studies analyze how strategic planning should be designed to fit conditions in the organization's internal and external environments (e.g., Andersen, 2004; Ansoff, 1965; Boyd & Reuning-Elliott, 1998; Schendel & Hofer, 1979). External contingencies typically include characteristics of a firm's industry context, including environmental uncertainty and turbulence (e.g., Armstrong, 1982; Boulton, Lindsay, Franklin, & Rue, 1982; Javidan, 1984), complexity and stability (e.g., Lindsay & Rue, 1980; Odom & Boxx, 1988), environmental ambiguity (e.g., Stone & Brush, 1996), industry maturity and growth (e.g., Bracker, Keats, & Pearson, 1988), and the hostility of market environments (e.g., Grinyer, Al-Bazzaz, & Yasai-Ardekani, 1986). Such contingencies influence, for example, the complexity and sophistication of planning processes, with a tendency for firms in very complex and unstable environments to adopt more comprehensive long-range planning processes (Lindsay & Rue, 1980).

*Organizational contingencies.* In terms of organizational contingencies, factors such as firm size, age, structural complexity, capital intensity, and the growth and developmental stage have been considered as influences on strategic planning systems (Armstrong, 1982; McCaskey, 1974; Odom & Boxx, 1988). Odom and Boxx (1988), for example, analyze how organization size and growth affect planning sophistication. Studies on the role of organizational structures suggest that mechanistic organizations, for example, benefit from goal-oriented planning, while directional planning is beneficial to organic organizational forms (McCaskey, 1974).

Furthermore, strategic orientation, grand strategy, and the substance of strategic decisions have been identified as contingencies for planning systems (Grinyer et al., 1986; Pearce, Robbins, & Robinson, 1987; Robinson & Pearce, 1988; Rogers, Miller, & Judge, 1999; Veliyath & Shortell, 1993). Rogers et al. (1999), for example, demonstrate how different strategies lead to different information requirements that need to be met by a specific planning element. In the paper, the authors conclude that while contingencies may affect details, strategic planning seems to have value for organizations, regardless of their strategic orientation. Pearce, Robbins, and colleagues (1987) found there were positive effects of formal planning on financial performance regardless of strategy.

### *Strategic Planning Practice: Formality as the Central Construct*

Grounded in rational-design and contingency perspectives, the formality of planning and ways of measuring the degree of formality were near the center point of the discussion of

strategic planning practices in the 1980s and early 1990s. In this tradition, strategic planning is captured as a process involving a fixed sequence of steps, starting with strategy formulation, including implementation, and typically ending with evaluation and control (e.g., Hofer & Schendel, 1978). Relying on such a process model, many studies employ survey-based measures of strategic planning formality, including items such as whether there is a mission statement, what kind of environmental analysis is performed, the extent that formal long- and short-term goals and action plans govern behavior and translate into written procedures, and the use of schedules and other planning documents (Andersen, 2004; Bazzaz & Grinyer, 1981; Boyd & Reuning-Elliott, 1998; Hopkins & Hopkins, 1997; Pearce, Freeman, et al., 1987; Wood & LaForge, 1979, 1981). Besides the term *formality*, related labels, such as *planning comprehensiveness*, *sophistication*, and *completeness*, are used to capture the closely related dimensions of planning (e.g., Boulton et al., 1982; Bracker & Pearson, 1986; Lindsey & Rue, 1980; Rhyne, 1985).

Against the majority of prior studies, which relied on measures of formality, Ramanujam and colleagues (1986), Venkatraman and Ramanujam (1987), and Ramanujam and Venkatraman (1987) applied a more dynamic perspective, conceptualizing planning system success as improvements in the planning capabilities of an organization. Their operationalization of strategic planning introduces skills such as adaptability, innovativeness, and motivation and provides a more detailed and differentiated measure of planning than many prior studies. Planning systems are evaluated as a multidimensional construct, including the following five design dimensions: system capability, use of techniques, attention to internal facets, attention to external facets, and functional coverage. In retrospect, these three papers represent the beginnings of a potential trend in research toward a capability-based view of strategic planning and offer a more refined understanding of both proximate and distal outcomes.

### *Strategic Planning Practitioners*

Early studies focusing on actors in strategic planning seem to consider the human factor more as a potential source of trouble in an otherwise rational planning process than as a source of valued contributions (Das, 1987; Kumar, 1978; Lyles & Lenz, 1982; Mintzberg, 1994d). Lyles and Lenz (1982), for example, identify behavioral problems, such as resistance to change, fear of making mistakes, and goal displacement, as barriers to successful planning created by the human factor. Cognitive bias and information-processing limits of managers are identified as other sources of vulnerabilities that can negatively influence the effectiveness of planning systems (Barnes, 1984; Hogarth & Makridakis, 1981).

Issues of participation had been identified before (Dyson & Foster, 1982; Gerbing, Hamilton, & Freeman, 1994), but prior to Mintzberg's critique (e.g., 1994b, 1994c), strategic planning research usually assumed that strategy formulation processes were concentrated at the top of an organization. While specialized strategic planners might prepare analytical input for the top management team, the latter is seen as responsible for strategy development (Bower & Doz, 1979). General managers and especially chief executives are considered owners of strategic decisions, speaking and deciding on behalf of the whole organization (e.g., Pettigrew, 1985).

### *Theoretical Perspectives*

Up until the 1990s, strategic planning research drew on the rational-design perspective, which describes strategic planning as a “deliberate, linear, rational process” (Brews & Hunt, 1999: 891; see also Chaffee, 1985). This view is often coupled with contingency theory (e.g., Brews & Hunt, 1999; Chaffee, 1985; Hofer & Schendel, 1978) and behavioral theory as a basis for analyzing the influences of internal/external conditions and human behavior, respectively, on strategic planning (Mitroff, Barabba, & Kilmann, 1977; Wu, 1981). The practical advantages of rational models of planning lie in clear, comprehensible, and systematic approaches to formulating strategy. However, rational-design approaches suffer from a number of shortcomings summarized by Mintzberg (1994b, 1994d) as the fallacy of pre-determination, the fallacy of detachment, and the formalization fallacy.

Besides behavioral views on issues of strategic problem-solving and planning models, contingency theory dominates strategic planning research until the 1990s. The dominance of contingency thinking and lack of other substantive theory are emphasized by the fact that many authors do not make the theoretical basis of their arguments explicit. Coding the articles for this review revealed that many works take for granted a contingency framework in the context of planning research. Relatively few authors explicitly draw on other theories in conceptualizing their research (e.g., Powell, 1992).

In sum, strategic planning research between 1980 and the early 1990s seems dominated by the evaluation of the effects of strategic planning on distal organizational outcomes, mostly measures of organizational performance, and questions of how to design strategic planning systems given specific environmental and/or organizational contingencies.

## **A New Era in Strategic Planning Research**

The number of strategic planning studies published yearly in journals like the *Academy of Management Journal*, *Management Science*, and the *Strategic Management Journal*, where much of the research had been appearing, falls off after a peak in the early 1990s (Whittington & Caillaet, 2008). But to interpret this decline as the end of practical or scholarly interest in planning would be misleading. Strategic planning remains one of the most dominant and widely used strategy tools in business (Rigby, 2001; Rigby & Bilodeau, 2011). Table 2 provides an overview of the articles reviewed for the period from 1994 to 2011.

After Mintzberg’s discourse on the fallacies of strategic planning, a reorientation in research took place, bringing new perspectives and assumptions and launching a new era. Taking Mintzberg’s fallacies into account, researchers redefined underlying assumptions about the process of strategy formation and integrated these into their research on strategic planning. Consequently, conceptualizations of strategic planning evolved away from their original grounding in a rational and centralized process toward more realistic and socialized process models, including those that foreground emergence, evolutionary forces, and strategizing as a social practice (e.g., Andersen, 2004; Grant, 2003; Jarzabkowski & Balogun, 2009).

In an early and influential paper, for example, Mintzberg and Waters (1985) argued that not all strategy is a result of deliberate intentions developed as a result of strategic

**Table 2**  
**Included Articles 1994 to 2011**

Authors	Method <sup>a</sup>	Topics <sup>b</sup>
<i>Academy of Management Journal</i>		
C. Miller & Cardinal (1994)	2b	P2, OC, EC, DO
<i>Administrative Science Quarterly</i>		
Ketokivi & Castaner (2004)	2a	P1, P2, PO
<i>California Management Review</i>		
Dominguez, Worch, Markard, Truffer, & Gujer (2009)	3c	P2, P3
<i>Harvard Business Review</i>		
Mintzberg (1994a)	1a	P1, P2, PO
Shaw, Brown, & Bromiley (1998)	3a	P3, PO
Campbell (1999)	3a	P2, P3, PO
Mankins & Steele (2006)	3a	P2, P3, PO
<i>Journal of Management</i>		
Gerbing, Hamilton, & Freeman (1994)	2a	P1, PO, DO
<i>Journal of Management Studies</i>		
Capon, Farley, & Hulbert (1994)	2a	P2, DO
Yasai-Ardekani & Haug (1997)	2a	P2, OC, EC
Judge & Douglas (1998)	2a	P2, DO
Andersen (2004)	2a	P2, OC, DO
Eddleston, Kellermanns, & Sarathy (2008)	2a	P2, DO, OC
Jarzabkowski & Balogun (2009)	3b	P1, P2, PO
<i>Long Range Planning</i>		
Huntsman (1994)	3a	P1, P2, P3
Koufopoulos & Morgan (1994)	2d	P3, EC
Mintzberg (1994b)	1a	P1, P2
Mintzberg (1994c)	1a	P1, P2
Nosowski (1994)	3a	P3
Wilson (1994)	2d	P1, P2, P3, EC
Houlden (1995)	2d	P1, P3
Alexander (1995)	1a	P1, PO
Kukalis & Jungemann (1995)	3a	P3
Bonn & Christodoulou (1996)	2d	P1, P2
Chae & Hill (1996)	2d	P3
Gilmore & Camillus (1996)	2d	P2, OC
Mulligan, Hatten, & Miller (1996)	1a	P2
Taylor (1997)	3a	P1, P2
Berry (1998)	2d	P2, DO, OC, EC
Heracleous (1998)	1a	P2
Peel & Bridge (1998)	2a	P2, DO, EC, OC
Wilson (1998)	1a	P2, P3
Glaister & Falshaw (1999)	2d	P3
Herbert (1999)	3a	P2, OC, PO
Andersen (2000)	2a	P2, DO, OC, EC
Frentzel, Bryson, & Crosby (2000)	3a	P3, P1, PO, EC
Jennings (2000)	3a	P2, P3, PO
Giraudeau (2008)	3a	P3
King (2008)	3b	P3, EC, PO
Nordqvist & Melin (2008)	3b	P1

(continued)

**Table 2 (continued)**

Authors	Method <sup>a</sup>	Topics <sup>b</sup>
Ocasio & Joseph (2008)	3b	P2, P3, PO
Vila & Canales (2008)	3b	P1, PO
Eppler & Platts (2009)	3c	P3, PO
<i>Organization Studies</i>		
Spee & Jarzabkowski (2011)	3b	P1, P2, P3
<i>Sloan Management Review</i>		
Kaplan & Beinbocker (2003)	3b	P1, P2, P3, PO
<i>Strategic Management Journal</i>		
Hosmer (1994)	1a	P2, PO, DO
Stone & Brush (1996)	1a	P1, P2
Hopkins & Hopkins (1997)	2a	P2, OC, EC, DO
Boyd & Reuning-Elliott (1998)	2c	P2
Brews & Hunt (1999)	2a	P2, DO, OC, EC
Rogers, Miller, & Judge (1999)	2a	P2, DO, OC
Grant (2003)	3b	P1, P2, P3, PO, DO

Note: Table 2 reports a summary of the analysis of articles reviewed in this article. A more detailed set of tables is available from the first author Carola Wolf (c.wolf@aston.ac.uk).

<sup>a</sup>Method is coded as follows: 1a = conceptual (including conceptualizations of planning models); 1b = review paper; 2a = surveys or experimental data for statistical analyses and testing; 2b = meta-analysis; 2c = scale development; 2d = mixed-method approaches in data collection and analysis; 3a = descriptive case studies and conceptual studies with illustrative case studies; 3b = inductive theory building (e.g., grounded theory); 3c = action research.

<sup>b</sup>Topics are coded using the abbreviations of key terms in Figure 1: P1 = strategic planning practitioners; P2 = strategic planning practices; P3 = strategic planning praxis; PO = proximate outcomes of strategic planning; DO = distal outcomes of strategic planning; OC = organizational contingencies; EC = environmental contingencies.

planning. Realized strategies—the actual pattern of decisions and actions over time—not only are an outcome of deliberate planning but also are influenced by emergent forces, that is, the decisions and actions arising within an organization that contribute to the pattern but that are not anticipated in the plan. Importantly, top managers are identified with the deliberate plan, while middle- and operating-level managers are the sources of emergent influence.

The influence of this emergent description is visible in at least two ways. First, the recognition of emergent strategy has produced a focus on the participation of other organizational actors, such as middle managers, in the strategic planning process and, hence, their role and influence in strategy formation. Second, there has been a reorientation toward strategic planning as a tool for integrating hierarchical layers and coordinating centralized and peripheral sources of strategy (Andersen, 2004; Jarzabkowski & Balogun, 2009; Ketokivi & Castañer, 2004; Regné, 2003).

### *Strategic Planning Outcomes*

*Integration, coordination, and communication as proximate planning outcomes.* Consistent with a view embracing widespread participation, recent research shifts the focus away from rational, top-down decision making to the role of the planning system as an integrative, communicative device and a key coordinating mechanism for strategic decision

making (Andersen, 2004; Grant, 2003; Jarzabkowski & Balogun, 2009; Spee & Jarzabkowski, 2011). Grounded by Mintzberg's emergent view, strategic planning research also moves away from the prescriptive nature of design school models and focuses instead, for example, on the "social and political interactions over strategy making" (Jarzabkowski & Balogun, 2009: 1258). The purpose of such research is to understand strategy as a social accomplishment and the underlying microactivities associated with this practice (Jarzabkowski, 2005; G. Johnson et al., 2003). Scholars aim at looking beyond the process of planning and focus instead on what the actors involved in strategic planning actually do (e.g., G. Johnson, Langley, Melin, & Whittington, 2007; Ketokivi & Castañer, 2004; Wooldridge & Floyd, 1990). Consequently, not only is strategic planning analyzed as a formal, bureaucratic process, but scholars also study it as it develops through the actions and interactions of actors throughout an organization. The main question is no longer whether "having" a formal strategic planning system is efficient or effective for an organization. Rather, researchers now focus on how members of the organization enact strategic planning, that is, what people actually do during planning episodes and how strategic planning can help to achieve integrated strategy making and strategic coordination (e.g., Jarzabkowski, 2003; Spee & Jarzabkowski, 2011; Whittington, 2006).

*Strategic change and adaptation as distal outcomes.* Studies show that strategic planning contributes to stability as well as change (e.g., Grant, 2003). Jarzabkowski (2003), for example, demonstrates that strategic planning practices may lead to strategic continuity in some cases, but when planning produces a significant reinterpretation of strategic circumstances, organizational change is a likely outcome. Although strategic planning is sometimes associated with inflexibility (Hamel, 1996), most recent studies suggest that planning offers a framework for adaptation, enabling decentralized strategy making and providing guidance for flexible development (e.g., Andersen, 2004; Grant, 2003; Regnér, 2003). The achievement of strategic adaptation appears to depend on which actors are involved in strategic planning and how such participation is implemented.

### *Actors in Strategic Planning*

We see three key trends in recent research on the role of actors in strategic planning. First, since the 1990s, the field has moved away from the simplistic view of strategic thinking being the purview of top management with implementation left as the responsibility of the rest of the organization (Mintzberg, 1994c, 1994d). Instead, scholars take into account a diversity of actors in strategic planning. Second, as part of a general decentralization of strategic responsibilities, research has identified a role shift and new responsibilities for middle- and lower-level actors. Both the quality of decisions and the efficiency of implementation are seen to benefit from more decentralized planning (e.g., Andersen, 2004; Grant, 2003). Third, research has moved away from questions like "How do organizational members impede planning?" (e.g., Lyles & Lenz, 1982) to such questions as "How do organizational members contribute to planning, and how can they be integrated?" (e.g., Frentzel, Bryson, & Crosby, 2000; Nordqvist & Melin, 2008).

*Broadening the actor perspective: Middle managers as strategy shapers.* Particular attention has been paid to the role of middle managers in strategic planning (Jarzabkowski & Balogun, 2009; Ketokivi & Castañer, 2004; Spee & Jarzabkowski, 2011; Wooldridge & Floyd, 1990; Wooldridge, Schmid, & Floyd, 2008). Wooldridge et al. (2008) specify a number of potential positions classified as middle managers, including heads of divisions and functional departments and leaders of developmental projects and strategic initiatives. In these functions, they become critical to the success of the strategy development process (Balogun & Johnson, 2004; Burgelman, 1991; Floyd & Wooldridge, 1996).

The argument for middle managers' importance in planning begins with the observation that "what makes middle managers unique is their access to top management coupled with their knowledge of operations" (Wooldridge et al., 2008: 1192). They are thus in a position both to channel important input about markets, technologies, and competitors from operating levels into the planning process and to influence directly their subordinates' willingness and ability to implement the objectives of the plan. In contrast to the assumption that their role lies exclusively in implementation, Wooldridge and Floyd (1990) found that the involvement of middle managers in formulation activities, such as goal formation and alternative generation, actually improved the organizational performance.

*Changing roles and responsibilities.* One of the key findings in recent planning research relates to the changing role of strategic planning departments and other strategy actors. Grant (2003) concludes that rather than actually doing the planning, corporate planning departments now function as a supporting resource for planning efforts by facilitating communication across the whole organization, delivering technical and administrative support, and acting as internal consultants for planning activities. This trend is confirmed by a number of related studies equally highlighting the shift of responsibility to middle managers and business units and the new roles of planning staff (Alexander, 1995; Bonn & Christodoulou, 1996; Houlden, 1995; Ocasio & Joseph, 2008; Taylor, 1997; Wilson, 1994). This does not mean, however, that the importance of CEOs or central strategic planning departments has decreased. Top management involvement is often cited as a key success factor (e.g., Ocasio & Joseph, 2008). Strategic planners fulfill specialist planning-related tasks and coordinate the overall planning process, keeping the process alive in the organization and assuring a degree of flexibility in the formal process (e.g., Huntsman, 1994). In addition, they function as promoters of strategic thinking and developers of strategic skills (Alexander, 1995; Grant, 2003; Mintzberg, 1994a).

### *Strategic Planning Practices*

*Balancing formality and flexibility.* Research interest in planning formality and related concepts, such as planning intensity and sophistication, continues to be visible (e.g., Berry, 1998; Boyd & Reuning-Elliott, 1998; Hopkins & Hopkins, 1997). These studies are oriented toward informing debates on the relationship between formal planning and organizational performance that dominated the previous decade of planning research. For example, when evaluating the role of formal planning in organizational

performance, scholars examine whether organizations have specific planning elements and activities in place, such as a mission and vision, strategic goals, analytical tools, and so on (e.g., Boyd & Reuning-Elliott, 1998). More than whether such activities are formalized, recent research shifts the focus to detailed descriptions of how exactly these activities are performed. The purpose is to generate a more complete picture of the mechanisms that link planning to organizational outcomes.

With strategic change and adaptation as important outcomes, recent authors have studied how planning processes are designed for flexibility. Some authors decry formality in planning as an impediment to flexibility (e.g., Andersen, 2004), while others focus on identifying an appropriate level of formality as a means of orchestrating flexible strategy making. Grant (2003), for example, highlights the fact that planning systems provide a mechanism for coordinating decentralized strategy making within complex corporate structures. The need for flexibility in planning systems may actually be increasing formality in some respects (e.g., different forecasting approaches, connecting overall direction to concrete action) while reducing formality in others (e.g., enabling open discussions). Heightened flexibility is also associated with shorter planning time horizons and incorporating a variety of performance targets, including financial ones but also environmental, operative, and strategic mileposts (Barringer & Bluedorn, 1999; Grant, 2003). These descriptions contrast sharply with early studies, where the emphasis was on formal techniques and long-run forecasts (e.g., Moses, 1975; Naylor & Tapon, 1982; Walters, Mangold, & Haran, 1976).

Strategic planning may be seen, therefore, as an antecedent of adaptation, in the form of entrepreneurial behavior (e.g., Barringer & Bluedorn, 1999), but the design of strategic planning processes matters with respect to whether adaptation follows. The relationship between strategic planning and strategic thinking has framed this debate. The two constructs can be seen as inter-related, reinforcing learning processes (Heracleous, 1998; Wilson, 1994). If strategic planning is to enable adaptation, according to one argument, it should be designed to foster and coordinate strategic ideas rather than compel particular analytics in support of predetermined strategic decisions (Andersen, 2000; Mankins & Steele, 2006; Mintzberg, 1994a).

*Participation.* Participation is described in two dimensions: the extent of involvement (quantitative dimension) and the actual degree of influence on strategic decisions (qualitative dimension) (Andersen, 2004; Gerbing et al., 1994; Vila & Canales, 2008). Participation seems crucial for generating strategic consensus among a broader diversity of managers involved in strategy making. Ketokivi and Castañer (2004), for example, demonstrate the role of middle managers in strategic planning, concluding that participation and communication in strategic planning reduce position bias and enhance goal convergence. Jarzabkowski and Balogun (2009) extend these insights by further exploring the participation of middle managers and analyzing the processes involved in integrative planning. These authors analyze how “issues of power, interest, and perceptions of integration arise and are resolved through the negotiations and compromises that occur as actors interact over the plan” (Jarzabkowski & Balogun, 2009: 1256). In a similar vein, Spee and Jarzabkowski (2011) study the development of a strategic plan as a communicative process focusing on the iterative and recursive relationship of talk and text and the consequences for power within organizations.

### *Planning as Dynamic Capability*

We have already advanced the role of strategic planning as a capability (Brews & Hunt, 1999; Ramanujam & Venkatraman, 1987). As an organization gets better at strategic planning capability, there is the potential for turning the process toward the development of new operating capabilities and thus toward dynamic capability (Eisenhardt & Martin, 2000). If dynamic capability is positioned as an outcome, however, the planning process is reinterpreted as a way of learning and improving skills (Alexander, 1995; Houlden, 1995). Teece (2007) describes the process as sensing and seizing opportunities.

Characterizing strategic planning processes as a resource and potential source of competitive advantage means a dramatic shift away from the assumption of an optimal, “one-size-fits-all” planning process. Rather, from a dynamic perspective, planning processes should be adapted to the specific conditions facing organizations (Campbell, 1999; Jennings, 2000; Ocasio & Joseph, 2008). Campbell (1999) stresses the need to account for the uniqueness of organizations and identifies attempts at benchmarking as a source of failure. Ocasio and Joseph (2008) illustrate how planning processes develop by describing the evolution of planning at General Electric. Similarly, Jennings (2000) illustrates such evolutionary processes in an energy company. The paper identifies success factors, “including organization-wide commitment to planning and the integration of planning outputs into other organizational processes, such as human resource planning, budgeting and review and reward systems” (Jennings, 2000: 216-217).

### *The Praxis of Strategic Planning*

While traditional approaches look at the sequential macrosteps involved in the process of deliberate strategy formulation (e.g., goal formation, alternative generation, choice), more recently, scholars have focused on the actual activities of participants and how they engage with these activities. This focus addresses questions about the role that formal planning plays in different types of organizations; which tools are used in planning processes; how they are applied; how specific planning episodes, such as strategy workshops, are orchestrated; how participants interact in these episodes; how strategic plans are generated; and what is specified in the content of these plans (e.g., Giraudeau, 2008; Shaw, Brown, & Bromiley, 1998; Spee & Jarzabkowski, 2011).

*The role of planning for specific (types of) organizations.* Recent studies referring to the praxis of strategic planning and describing the actual activities in planning processes in some measure continue the descriptive planning studies dating back to the 1970s and before (e.g., Emshoff, 1978). Since business contexts have changed and modern organizations are faced with new challenges, descriptive studies play an important role by exploring how specific types of contemporary organizations plan. Typically, such research examines either one specific organization or a specific category of organizations representing national contexts (e.g., Koufopoulos & Morgan, 1994) or specific business contexts (e.g., King, 2008). Some studies concentrate on public-sector organizations (Frentzel et al., 2000; Nosowski, 1994) or

specific institutional settings, such as regulated environments (Kukalis & Jungemann, 1995). Furthermore, small- and medium-sized enterprises (SMEs) have received considerable attention as an important category of firms (Berry, 1998; Eddleston, Kellermanns, & Sarathy, 2008; Peel & Bridge, 1998) for characterizing planning processes, as have large, multinational companies (Grant, 2003; Ocasio & Joseph, 2008). Other studies have sought out, or tested, contingency variables in the actual praxis of planning, including firm- (Wilson, 1994), nation- (Herbert, 1999), or industry-specific cultures (B. King, 2008).

*Tools in use.* With fundamental changes in business environments having taken place since the peak of strategic planning research in the 1980s, it is relevant to explore more contemporary analytical tools employed during planning processes. Recent research shows that changes have occurred in the type of tools used as well as in the combinations of tools that are applied for strategic planning. In order to live up to modern business contexts characterized by high competitiveness and fast-changing technological developments, organizations rely on more sophisticated planning tools and tend to combine different methods rather than focus on one specific technique (e.g., Wilson, 1994). Capital budgeting methods, which have gained considerable attention in the past (Guerard et al., 1990; Naylor & Tapon, 1982), continued to be among the important categories of tools still used in the 1990s (Peel & Bridge, 1998). Other tools and techniques that organizations typically use include scenario analysis, analysis of Strengths, Weaknesses, Opportunities, and Threats (SWOT), the analysis of internal success factors, and the analysis of competitors and stakeholders and newer cognitive methods, such as cognitive mapping (Glaister & Falshaw, 1999; Frentzel et al., 2000; Wilson, 1994).

*Strategic plans.* Strategic plans as outcomes of strategic planning processes have been conceptualized as tools used to negotiate and make sense of strategy. From this perspective, plans represent material artifacts instrumentalized by the actors to facilitate involvement in the strategy process and to position their interests in the organization's strategy (e.g., Jarzabkowski & Balogun, 2009; Spee & Jarzabkowski, 2011). Critical theorists argue that plans may be used more for symbolic reasons and that the process has little to do with actually exploiting strategy tools for the benefit of the organization. Often, these observers argue, plans are prepared for and presented to top management in a routinized way that leaves little room for actual strategy discussions. The plans in such presentations are seldom used actually to guide day-to-day actions (Campbell, 1999; Mankins & Steele, 2006).

Ideally, strategic plans represent tools to manifest and communicate strategy and control its implementation (Mintzberg, 1994c, 1994d). To live up to this promise, however, plans should be more than "just lists of 'good things to do' . . . but [failing] to explain the logic or rationale of winning in the marketplace" (Shaw et al., 1998: 42). The understanding of and commitment to strategy by organizational members are both influenced by the way plans are designed and presented. Shaw et al. (1998) emphasize that packaging strategy into narratives and telling stories rather than listing bullet points increases the efficiency of strategic plans. The way plans are written, including visual and textual representations of strategy, appears to make a difference in how these plans are perceived and what behaviors they trigger, ranging from ignoring plans to strategic innovation and wholehearted strategy implementation (e.g., Eppler & Platts, 2009; Giraudeau, 2008; Shaw et al., 1998).

### *Theoretical Perspectives*

The diversity of topics and research foci since the mid-1990s contributes to a wider variety of theoretical perspectives than we observed prior to 1994, adding to the contingency approaches and rational-design school thinking of earlier research. Compared with other domains, however, strategic planning research has not been noted for its rigorous theory. Evidence for such lack of theory was identified in C. Miller and Cardinal (1994):

Two decades of empirical research have not produced consistent support for . . . [the planning-performance relationship]. . . . Further, contingency models developed by proponents of planning to account for the inconsistent planning-performance findings reported by previous research have been virtually ignored in empirical work and their value, therefore, has been unknown. (p. 1650)

Although the authors did not say so, this lack of coherence is a clear marker of weak theoretical foundations (Weick, 1989). Since 1994, however, there have been encouraging developments with respect to the use and development of theory.

Indeed, an important exception to the lack of theory is the scholarship emerging from the strategy-as-practice perspective. There are a number of practice-based theories from sociology that are beginning to enrich scholarly discussion on planning (for an overview on the diversity of theories under the practice-based label, see Whittington & Vaara, 2012). We have already reviewed planning studies employing this perspective and will return to this theoretical domain in the discussion of future research.

The other theoretical perspectives with increasing importance in strategic planning research are resource and capability based (Brews & Hunt, 1999). Although relatively few studies have embraced a resource-based view of strategic planning (for an exception, see Powell, 1992), this line of research is potentially important. It offers a theoretically grounded way to connect strategic planning to competitive advantage and other economic outcomes.

In part because theory has been absent in too much of strategic planning research historically, and in part because there is so much potential in this domain, the use and development of theory becomes an overarching theme in our critique and discussion of future research. We argue that answers to unresolved issues within existing research streams and the development of new and interesting questions become more tractable and cumulative if research is theory based.

### *Summary and Critique of Strategic Planning Research*

Strategic planning research suffers from several weaknesses that undermine its potential impact in the academic literature as well as its ultimate value in the world of practice. In our opinion, the most important of these—already mentioned—is the lack of theory that typifies this body of work. While there are notable exceptions, the majority of the studies, and especially early research, adopt a rational-analytic model of strategic planning and conceptualize contingencies, like uncertainty in the external environment, that are born out of this model.

The rationalist logic has proved useful, and planning research of this kind has led to a significant amount of normative theory. Organizational science has matured considerably since the early days, however, and a number of theories in domains adjacent to strategic planning (e.g., strategy process) and others in more distant domains, such as institutional theory and cognitive psychology, suggest themselves for use in the planning context. To date, there has been too little integration of these theories into explanations of strategic planning.

We would argue, consequently, that future research should do more to incorporate a wider variety of theories into conceptual and empirical work on strategic planning. We use the word *theory* broadly to mean “an ordered set of assertions about a generic behavior or structure assumed to hold throughout a significantly broad range of specific instances” (Sutherland, 1975: 9). There are at least three good reasons for broadening the range of theories in planning research; each of these reflects a weakness in the existing literature.

First, employing a broader range of theory will lead to more connections between the phenomena of strategic planning and constructs representing its origins and antecedents, its constituent parts, its outcomes, and the contexts in which these occur, leading to a richer and more coherent understanding of strategic planning. Second, a greater use of theory will produce research that is more cumulative. If future researchers make a stronger commitment to theory, it is more likely that they will organize their efforts around common, conceptual frameworks, resulting in more coherent research streams. Third, and in a related vein, more use of theory means more theory-driven methods. When research designs are theory driven, for example, the likelihood that measures will be reliable and valid increases dramatically.

Arguing that more theory is needed would be meaningless without some suggestions as to how to improve the situation. In the rest of the article, we return to our conceptual framework (see Figure 1), this time using it as a road map to trace the outlines of future research. We hope to show how the use of theory can enhance the study of strategic planning.

## **Future Directions**

We organize this section around elements in our conceptual road map (Figure 1) as launching points for research, and we employ theory to connect ideas and define relationships with other elements. In doing so, we identify exemplars from recently published work and draw on institutional, behavioral, and resource-based arguments to articulate what we think are interesting and important research questions.

### *The Context of Strategic Planning*

Institutional theory calls our attention to the previously underresearched observation that strategic planning is a practice embedded in the broader society—influenced by “shared understandings, cultural rules, languages and procedures—that guide and enable human activity” (Whittington, 2006: 614). While prior research has explored the context of strategic planning and confirmed the relevance of national culture to planning processes, for example (Herbert, 1999), so far, studies have done little to trace relationships between the social

context and strategic planning. We would argue that contemporary institutional theory (Scott, 2008) offers a powerful analytical lens for exploring this link—in terms of both providing a vocabulary and identifying theoretical mechanisms.

For example, one of the interesting questions raised by institutional theory is, to what extent has strategic planning become professionalized, and what does this mean for how it is practiced in organizations? Research suggests that strategic planning has been legitimized as a professional practice among both for-profit and, increasingly, nonprofit organizations (Whittington & Cailluet, 2008) and that it involves professionals as “those who do the work of making, shaping and executing strategies” (Whittington, 2006: 619). On the basis of observations of four decades of newspaper advertisements, however, Whittington, Cailluet, and Yakis-Douglas (2011) conclude that strategy is a “precarious” profession whose existence is highly sensitive to both economic downturns and organizational politics. Other scholars have addressed the roles of such professionals in strategic planning (Armstrong, 1982; Mintzberg, 1994c; Oakes, Townley, & Cooper, 1998), but we still know very little about how professionalization influences strategic planning practices.

Interesting questions include whether professionalization is associated with greater strategic planning formality in organizations and, if so, whether such formality yields benefits in the form of more legitimized strategic decisions or other important outcomes. How does the professionalization of strategic planning square with the need for planned emergence? What is the role of tradition in strategic planning (Greenwood, Suddaby, & Hinings, 2002) and how does tradition influence the source and developmental path of innovations in praxis such as “crowd-sourcing” (Gast & Zanini, 2012)?

Empirical studies could employ methods similar to those in Lounsbury’s (2001) study of recycling practices in higher education. He drew on archival, multiple-respondent survey data to measure variables such as broader societal influence, program staffing, and program status and employed event history analysis to estimate the likelihood of different practices. Similar to this study, influences from the broader society on the adoption of planning practices could be measured by counts of articles about strategic planning appearing in business-oriented media. Other parallels to the present context include the use of surveys to assess professionalization (measured, for example, by the number and credentials of full-time strategy staff and the presence of a chief strategy officer) on the adoption of planning practices and/or praxis (specific variables are suggested in Figure 1).

Despite the precariousness of strategy as a profession, there is evidence that strategic planning itself is a highly institutionalized practice, complete with the common cognitive scripts and behavioral norms typical of religious rituals (G. Johnson, Prashantham, Floyd, & Bourque, 2010). Indeed, a high degree of institutionalization would explain the fact that strategic planning continues to be practiced widely in large organizations (66% of those surveyed) despite a very low level of managerial satisfaction (Mankins & Steele, 2006). These statistics suggest that strategic planning may be motivated as much by a broader set of social forces (e.g., isomorphism) as by managers’ desire to improve decision quality or the efficiency of implementation.

To the extent strategic planning is an institutionalized practice, the legitimization of practices makes the legitimacy of strategic decisions a potentially important outcome. Legitimacy is important as an outcome because with it comes the shared cognitive frameworks, values,

and social norms that are associated with strategy realization (Suchman, 1995). Presumably, more-legitimate practices produce more-legitimate outcomes. Given this, we need research that connects the embeddedness of strategic planning in a particular social context, the legitimation of strategic planning practices, the legitimacy of decisions and actions emanating from strategic planning, and the realization of strategy. Interesting questions may revolve around agency-structure tensions reflecting the multilevel character of institutional phenomena (Scott, 2008). How do managers attempt to instrumentalize strategic planning in order to legitimize strategic decisions? What activities affect legitimization and what are the process mechanisms underlying these relationships? If legitimacy requires conformity with the organization's values, beliefs, and sense of what constitutes appropriate behavior, how does strategic planning produce significant change? In short, conceptualizing the social context in institutional terms raises a number of important questions connecting context with practice and practice with outcome.

### *The Description of Strategic Planning*

*Practices.* The term *strategy practices* refers to “the routines and norms of strategy work” (Whittington, 2007: 1579). It includes “the social, symbolic and material tools through which strategy work is done” (Jarzabkowski & Spee, 2009: 70). Tracing the origins of such routines and norms has attracted the interest of researchers (G. Johnson, Prashantham, et al., 2010; G. Johnson, Smith, & Codling, 2010; Oakes et al., 1998; Whittington, 2006, 2007). G. Johnson et al. (2007) recommend the application of a micro-institutional perspective in the exploration of strategic planning as a strategy activity. Consistent with this, conceptualizing planning practice as a set of organizational routines (Feldman, 2000) opens the door to a better understanding of agency-structure dynamics in planning circumstances, how reflective action leads to changes in planning routines, and what this means for the adaptive potential of the planning process (Jarzabkowski, Matthiesen, & Van de Ven, 2009; G. Johnson et al., 2007; G. Johnson, Prashantham, et al., 2010). Questions along these lines include whether the relatively infrequent enactment of strategic planning routines compared with operating routines inhibits reflexivity and the feedback that triggers it. Are strategic planning routines—the purported instruments of change—inherently more inert than operating routines? What conditions lead participants to reflect on and improve strategic planning practices?

Research on strategic planning conceptualized as a set of routines likely should begin with qualitative research to explore the triggers of, and impediments to, reflexivity. But, once theory has developed on these issues, large-sample designs could be used to test relationships between levers of reflexivity and the inertia of strategic planning practices. The latter could be measured with archival data or survey items that provide indicators of the frequency and depth of change in planning practice.

The theory of ritual and ritualization offers another potentially fruitful body of theory for understanding strategic planning practices. Unlike routines, rituals are highly “privileged” events, removed from the everyday circumstances of the organization (G. Johnson, Prashantham, et al., 2010). Together with the use of a “liturgy” and the presence of a “specialist,” studies show that

such restricted access and removal from day-to-day activity leads to antistructure—the suspension of ordinary social roles and conventional ways of thinking. In the context of strategic planning, antistructure has been shown to produce “out-of-the-box” thinking and significant changes in strategic intent within the episode (G. Johnson, Prashantham, et al., 2010). This same work suggests, however, that the durability of such change in the face of realities “back home” may be tenuous. This raises a number of questions: What forms of ritual planning practice induce dramatic change? How are these precipitated in organizational settings? Under what circumstances are the changes more likely to carry over to the organization’s realized strategy? Rich descriptions produced through ethnographic methods would be useful in flushing out the cognitive, emotional, and behavioral characteristics of ritualized strategic planning episodes (see Kunda, 1992, as an exemplar). Multiple case study designs (Eisenhardt, 1989) with variations in (a) ritual characteristics, (b) the degree of strategic change precipitated in the ritual episode, and (c) the extent of change realized within the organization are suited to developing theory on both the distal and more proximate outcomes of ritualization (e.g., G. Johnson, Prashantham, et al., 2010).

*Practitioners.* In addition to defining social structures, concepts like professionalization and ritualization highlight the role of agency and actors in strategic planning processes. For example, what distinguishes different forms of participation and different degrees of engagement in planning activities? Discourse analysis has been used to map participation in strategy (e.g., Mantere & Vaara, 2008; Vaara, Sorsa, & Pälli, 2010). Mantere and Vaara (2008), for example, explore the reasons for lack of participation among middle managers. The study identifies discourses that inhibit participation, such as “mystification” and others that promote it, such as “self-actualization.” Despite what has been learned about strategy discourses and participation in planning, this recent work raises more questions than it answers. Who controls the discourse of strategic planning and why? Under what conditions does discourse evolve to support participation? What is the relationship between discourse, power, and participation in strategic planning?

Language is a powerful shaper of how we see reality and respond to events, and the voluminous documentation and long, focused conversations coming out of planning episodes provide fertile ground for applying the tools of discourse analysis. Although it has often been used by critical theorists (Fairclough, 2005), discourse analysis can also be used to develop and test hypotheses (Gee, 2011). Among the reasons this method is particularly suited to planning research is the connection between language and practice (Gee, 2011; Mantere & Vaara, 2008). In many respects, language enacts and constitutes most social practices, and an analysis of the language of strategic planning will thus have much to say about how it is actually practiced.

*Praxis.* Strategy praxis is “all the various activities involved in the deliberate formulation and implementation of strategy” (Whittington, 2006: 619). At this level of analysis, recent research suggests that the suspension of organizational rules is one of the features of planning workshops that help create an environment where significant change may be contemplated (Seidl, MacLean, & MacIntosh, 2011). But much is left to be discovered about how praxis precipitates outcomes. Part of what is needed is a taxonomy of strategic planning

praxis; in addition, theoretical development is needed to connect this taxonomy to outcomes. Important questions include the following: How does praxis influence communication and shared understanding? What configurations of praxis promote strategic thinking? When does praxis create obstacles to thinking strategically?

The opportunity to reexamine the use of tools in strategic planning through a behavioral theory lens is particularly attractive. Current research under the heading of “dual process theory” posits two cognitive architectures: one that is more rational, linear, and analytic (“System Two”) and one that is more emotional and automatic (“System One”) (Kahneman, 2003). From a conventional planning perspective, where rationality is the ideal, the goal of strategic planning tools might be defined as engaging rational processing and controlling the tendency to use heuristics and suffer cognitive bias (Hodgkinson & Healy, 2011). Questions from this starting point include the following: How does the analytical comprehensiveness (Fredrickson, 1984) of a strategic planning tool contribute to rational cognitive processing, and what are the effects of this on decision quality?

The argument for the application of praxis toward System One processing stems from ambiguities facing contemporary planners and the need for innovation as part of firm strategy (Martin, 2009). The goal is creativity rather than rationality. Examples of the kind of praxis that may help practitioners of strategic planning gain creative insight by harnessing System One processing include “serious play” (Jacobs & Heracleous, 2007), where participants use plastic bricks to build a model of their firm’s competitive landscape, for example. Questions include the following: What is the relationship between the use of creativity tools in strategic planning and outcomes such as adaptation and strategic change? Does this relationship depend on the degree of dynamism in the business environment? At what stage of the strategic planning process is input from creative thinking useful? How can the use of creative thinking in strategic planning be harmonized with the need for rationality in the process and legitimacy as an outcome?

Research focused on these issues will benefit tremendously from the well-developed tradition of experimental designs in behavioral theory, including prior research on strategic decision making (e.g., Korsgaard, Schweiger, & Sapienza, 1995; Schweiger, Sandberg, & Rechner, 1989). In particular, the use of analytical planning tools lends itself to manipulation in experimental groups, and scenarios, cases, and simulations can be used to mimic the strategic context. Furthermore, outcomes such as shared understanding (or strategic consensus) and strategic change can be assessed using surveys or expert observers across a sufficiently large number of experimental groups to support multifactorial designs.

### *Links to Proximate and Distal Outcomes*

For the most part, research questions launched on the basis of theory carry with them expectations both for certain “ultimate” outcomes (what we call distal outcomes) and for the causal or process mechanisms that link them to planning (proximate outcomes). These links can be seen in Figure 1. Thus, using institutional theory, for example, one can theorize “downstream” for the consequences of ritualization of strategic planning workshops for the strategy legitimation process and strategic legitimacy as the “ultimate” outcome. Similarly,

one can trace the influence of participation in planning through its consequences on integration and coordination onto strategic change as an outcome.

There is also a subset of questions that emerges from the consideration of outcomes themselves, however—looking “upstream” in Figure 1. From this perspective, it is natural to think more holistically about how planning practice, practitioners, and praxis combine in real organizations and how such combinations influence important outcomes. Configuration theory provides an approach to such research. Underlying such a configurational approach is the assumption “that elements of . . . [strategic planning] . . . often coalesce or configure into a manageable number of common, predictively useful types” (D. Miller, 1986: 235; Short, Payne, & Ketchen, 2008). This assumption is based on evidence in population ecology (Aldrich, 1979) showing that, over time, the environments select out many organizational forms, leaving a few to survive over the longer term. Configurations have been widely used in the strategic management literature to characterize strategy (Miles & Snow, 1978), decision-making (Fredrickson & Mitchell, 1984), and strategy-making processes (Hart, 1992).

Resource-based theory provides a way for linking configurations of strategic planning to outcomes like dynamic capability and sustained competitive advantage. From this perspective, one can reason that certain planning configurations outperform others in particular contexts. To the extent differences in strategic planning are both valuable and durable over time, they could be expected to contribute to managerial capacities for “sensing” and “seizing” opportunities that are at the heart of dynamic capability (Teece, 2007). This argument also connects strategic planning research with recent interest in the microfoundations of organizational capability (Felin & Foss, 2009).

There are essentially two approaches to developing configuration theory: Start deductively and test (e.g., Hart, 1992; Hart & Banbury, 1994) or start inductively and theorize (e.g., Miles & Snow, 1978). Deductive theory development could draw on the logics of organizational (Barney, 1991) and social capital (Tsai & Ghoshal, 1998) to explain how different configurations provide value in different contexts. The goal would be to identify archetypical configurations and connect them to dynamic capability under certain conditions. Thus, in a dynamic competitive environment, configurations that combine widespread participation with ritualized strategic planning episodes designed to stimulate creative thinking would be more successful than those that limit participation in strategy retreats to top managers, for example. Questions emerge: What are the archetypes of strategic planning in large organizations and what are the forces shaping them? Under what conditions are different archetypes successful in producing sustainable competitive advantage? When configurations fail, what are the weaknesses that undermine them? Are there certain configurations that are more likely to produce strategies that are socially and environmentally successful?

### *Future Methods*

Configurations make an interesting and instructive case for considering the opportunities and challenges of method in future research on strategic planning. Researchers should be mindful that planning is an observable construct and that, whenever possible, direct observations

are better than secondhand accounts as a source of descriptive data (see, e.g., Spee & Jarzabkowski, 2011, for an example of observational methods). Since some academics also function as consultants, participant observation may even be an option, one that should be treated with a mixture of enthusiasm and caution (Becker, 1958). MacIntosh and MacLean's (1999) study illustrates in an adjacent domain, for example, how case vignettes serve to elaborate and fill in details of deductive theory building. Grant's (2003) paper, frequently referred to here, represents a methodological exemplar. Future research should use such methods to pursue such questions as the following: What are the defining features or dimensions of contemporary strategic planning practice? How does the use of practices differ across planning configurations and what configuration of practices produces a high quality realized strategy? Under what conditions do such performance-enhancing configurations of planning practice arise? Is one or more of these conditions necessary to the success of planning configurations?

Defining the essential features of strategic planning and cataloguing planning practices represent the first empirical challenge of research that seeks to respond to such questions. Together with deductive theorizing, studies that utilize observational and unobtrusive measures along with interviews are likely to produce the kind of qualitative data that will be useful in developing a configuration theory of planning practice.

A number of analytical approaches suggest themselves for examining the validity of such theory, however. Cluster analysis offers one means of defining and measuring configuration (e.g., Cool & Schendel, 1987; Fiegenbaum & Thomas, 1990). Here, one can imagine theory specifying key features of planning practice (e.g., formality, flexibility, comprehensiveness, participation, etc., as in Figure 1), together with measures of such features developed for field surveys, leading to hypothesis-testing research on the effectiveness of different types of planning and the contingencies underlying such links. Designs employing interaction effects (e.g., Dess, Lumpkin, & Covin, 1997) and deviation score approaches (e.g., Delery & Doty, 1996) are also plausible analytical approaches for such research.

Recent developments in the use of set theory hold particular promise as sources of methodological inspiration for the study of practice configurations (cf. Fiss, 2007). A set theoretic approach and Boolean algebra could be used to represent combinations of practices and conditions or contexts that result in desired outcomes (Fiss, 2007; Ragin, 1987). Strengths of this approach include the ability to define meaningful combinations across a large number of variables, to take account of equifinality with respect to configurations as causes of desired outcomes, and to study idealized configurations that have not been observed empirically (Fiss, 2007). All of these issues appear particularly relevant in light of the complexity suggested in Figure 1 and the desire for normative theorizing that goes beyond previous planning-performance research. For example, unlike the clustering approach suggested earlier, the use of set theory would allow researchers to examine practice configurations in relationship to context, practitioners, praxis, and both proximate and distal outcomes. Such specificity would allow researchers to test more fine-grained hypotheses that come closer to the planning practices and conditions in real organizations (D. Miller, 1986).

In summary, there are opportunities for launching future research projects from every element in our conceptual framework. Moreover, as we have tried to demonstrate, theory can be used to help motivate such work and to make connections between the context for

planning, descriptions of the process, mechanisms of its influence, and the important organizational outcomes and contingencies in these relationships. Finally, we think configuration theory holds special promise in this domain, both as a way to integrate elements conceptually and as a basis for future empirical research.

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