Change Strategy (CS): Is There Any?

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Abstract

The construct of *change strategy* (CS) dates back several decades; however, its use remains vague, equivocal, and unestablished. In this study, we gave CS one possible operational content that differs from that assigned by earlier studies. We then examined how the reconceptualized and redefined change-strategic thinking appeared in two large service organizations. Our 30 informants were mainly HR specialists involved in change projects. We found that the organizations engaged in no conscious efforts to develop CSs, even for the most challenging change projects. Moreover, they rarely applied the four principles included in our definition of CS thinking. The results indicate great challenges in the rational exploitation of the theoretical knowledge on change. We believe that further conceptual development of CS would support the creation of a philosophy and a tool to improve the quality of change implementation.

Keywords:

change strategy, strategy for change, change management, change implementation

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1. Introduction

We are used to seeing the construct of *strategy* in a wide variety of contexts, so much so that without a contextual and explicit definition, there is a risk of inflating the term. Strategy is commonly linked to essential issues of organizational survival and succession. The decisions required to achieve future success often require companies to give something up and limit themselves to the most essential. Within this context, strategic thinking has evolved over time, moving from a focus on strategic planning and analysis in the 1960s to strategic positioning and so-called generic strategies in the 1980s. Over the next two decades, the dominant paradigm was the competence-based strategy. Since then, strategic thinking has evolved in a variety of directions, and contemporary views on strategy, such as 'strategy as practice', have brought it closer to everyday reality. The complex theory-based conceptions of strategy have raised questions concerning the possibilities of rational change management (e.g. Andrews 1987; Ansoff 1965; Chandler 1962; Jarzabkowski et al. 2007; Juuti & Luoma 2009).

The constructs of strategy and change are often combined in the term *strategic change*, which 'involves an attempt to change current modes of cognition and action to enable the organization to take advantage of important opportunities or to cope with consequential environmental threats' (Gioia & Chittipeddi 1991, 433). Strategic change refers to an intentional and teleological change that is thought to be rationally manageable. Its implementation is usually planned in the strategic processes of top management, and its products are often called managerial changes.

The combination *change strategy* (CS) is also widely used, but scientific articles seem to focus on more specific change strategies, such as 'the strategy for climate change', 'empowerment as a change strategy' and 'goal setting as a change strategy for health behavior' (examples taken from scientific articles). However, meta-research on this concept is largely lacking, and a review of the research revealed no conceptual analysis of the construct. As a result, the conceptual idea of CS remains vague and equivocal. The purpose of this article is to introduce a new perspective on CS and its operational definition and to demonstrate this perspective in empirical contexts. We are not adding a new concept to the strategic jungle; rather, we wish to give a more precise meaning to this pair of words so often used in managerial contexts. Further, despite continuous dependence on intentional change processes, we find that systematic discussions of their succession are infrequent. There is a need for new openings within this discussion to improve the quality of change.

First, we present some limitations with regard to change. We focus mainly on intentional change (as opposed to emergent change or unplanned change), which involves a will on the part of the actors to accomplish a defined change. Unlike continuous change, this kind of change is episodic by nature (see e.g. Weick & Quinn 1999), and it often manifests through development or change projects with clear beginnings and endings. The intentional change also involves a desire among actors to be rational and to rationally justify their choices. Although humans' rationality can be questioned—for instance, via a critique of the complexity theory (e.g. Stacey 1996)—it remains the prevailing paradigm of decision-makers. The third chosen perspective concerns the process of change implementation and conscious or unconscious decisions regarding the means and strategies for accomplishing change. Here, this means taking a holistic approach to the process to include both content and process: two concepts that are generally discussed separately, often even by different actors.

This article introduces and reconceptualizes CS and then examines how it is perceived and applied by change practitioners in two case organizations. First, we will briefly review the extensive tradition of change management and highlight some aspects that could contribute to change-strategic planning. Next, we will examine how the construct of CS is discussed and used in scientific literature. Then, we will introduce our definition of CS and our idea for its operationalization, demonstrated through case studies in different industries. As our approach to CS is novel, its rationalization requires a great deal of effort and space. Accordingly, we are obliged to be very concise in reporting the empirical results for this explorative phase in the development of CS.

To conclude this introduction, we emphasize that our focus is on CS as a generic term (i.e. unrestrained by context) and as a philosophy of how to approach intentional change. Tracing back to Lewin (1951) and many others, managerial change connections often use the constructs of *planned change* or *managed change*; however, we see these terms as referring to different sides of intentional change. Our concept of CS refers more specifically to something that is needed when 'planning' or 'managing' change: that is when selecting a contextual mix of means and actions.

2. What change?

The term *change management* (CM) is self-explanatory: we strive to manage and control change. However, as societies and organizations become more complicated, it seems the goal moves further away, and change becomes even harder to manage. The theory and research material on change is abundant and diverse; however, the theory on theories of change—that is, the meta-theory of change—is lacking. It is no wonder that managers and other decision-makers feel confused. The lack of clear guidance may lead practitioners to abandon the use of theory-based knowledge or use overly straightforward simplifications. Managerial change relies self-evidently on 'the rational man' who bases decisions on knowledge (e.g. Elster 1989).

In the following, we briefly review the extant knowledge of the change, considering only those mainstream views and categories relevant to our research on CS. First, we discuss the *process views* on change on both the macro and micro levels; then, we take up the *contextuality* of change and its connection to the cultural issues of an organization. Finally, we discuss the extensive area of *individual-level psychological knowledge.* As we focus on the meta-level review of change implementation, the discussion considers only certain categories of change-specific knowledge as examples of categories that should be considered in planning CS.

First, concerning the process views, we consider the macro models of change. Change processes on the macro level seek to identify the regularities of change: that is, the change 'laws of nature'. For instance, based on a comprehensive computerized literature search, Van de Ven and Poole (1995) formed four ideal-type theories for explaining the processes of change: *life cycle*, *evolution*, *dialectics,* and *teleology.* Reflecting on these from a CS perspective, the theories focus on the analysis of past change processes and, thereby, learning from the history of change. The macro models are creative in that their analogies lie in the paradigms of different sciences; however, the mechanical transfer of these theories may not be relevant to change in humans.

Other mainstream trends concerning change processes on the micro-level analyze the phases or steps of change implementation. Since Lewin (e.g. Burnes 2004), there has been a tradition of seeing the implementation process of intentional change as a series of sequential phases with typical features. The idea is that careful preparation of these steps is key to successful implementation. Most step models can be traced back to Lewin's (1947) original Three-

Step Model (unfreezing, moving and refreezing), though more recent models tend to be more complicated (e.g. Bridges 1995; Grundy 1994; Kotter 2012; Levy & Merry 1986; Lewin 1947, 1951; Tichy & Devanna 1986).

Step theories or models excel in analyzing the change implementation process, but they have also attracted strong criticism (e.g. Beer & Noria 2000; Kotter 1996). It can be argued that step theories have maintained a narrow view of change processes by concentrating only on the implementation and leaving out, for instance, how the change was initiated, how the change targets and contents emerged and formed, and the impacts of these factors on the whole process. The wider view of change we seek would also contain a review of the relation between the episodic and the continuous change, as well as a review of the relation between emergent and intentional change. In our view, comprehensive CS planning is more than just planning for the different steps of implementation.

The next category of change-specific knowledge discussed here is related to the contextual and organizational culture linkages of change. It is natural to think that the strategies of change implementation should be adjusted to the organizational situation and reality, which could range from strong organizational growth and international expansion (e.g. Gino & Pisano 2011; Hoffstede 2001; Karp 2006) to downsizings and lay-offs (e.g. Bernhardt & Mongrain 2010; Nathan & Neve 2009; Skarlicki et al. 2008). Technological breakthroughs also create their own change contexts (Leidner & Kayworth 2006; Sampson & Fytros 2008), and production challenges or inflamed work relations may interrupt or stop change projects. These contextual situations not only encumber organizational resources but also create climates that negatively affect the change process.

Different organizational cultures (e.g. Schein 1988, 2004) also define organizations' relations to change: the change culture. The change culture is linked to an organization's past, including previous changes and how they have been executed and perceived. Many studies have identified history as an important factor in shaping change culture (e.g. Adriani 2003; McCarthy & Gilles 2003; Mitleton-Kelly 2003).

Another cultural perspective relates to how openly people can express their feelings related to change, such as anxiety created by the uncertainty of change. Change may influence an organization's emotional climate, which may, in turn, affect both everyday activities and the change itself. If an organization's culture sets barriers to open discussion concerning emotions raised by change, the emotional climate may become inflamed (Alvesson 2002; Smollan & Sayers 2009).

The above investigation relates to our final review of the mainstream findings in change-specific knowledge: the individual-level psychological factors of change. In the rational worldview, the review of emotions, attitudes, prejudices, and motivational factors often receives too little attention, and planning for these factors in CS is frequently neglected. By contrast, the research examining the role of psychological factors in change processes is so extensive that it is difficult to choose references to represent this category of change-specific knowledge (see e.g. Armenakis et al. 2007; Bridges 1986; Clark & Payne 1997; Cummings & Bromiley 1996; Law et al. 2004; Mayer et al. 1995, 2000). However, there is a mismatch between the overflow of change-specific literature and its exploitation.

The individual-level psychological discussion suffers many pitfalls. For example, it is too easy to blame all change implementation challenges on reluctant employees and their resistance to change. It is also too easy to construct logistic flow charts of change implementation that overlook individuals' reactions and feelings. Change planners and executors are often too

far from the reality and everyday life of the employees; thus, they are often surprised by the strength of people's reactions. We argue that change-strategic planning should better prepare for the psychological and irrational aspects of change. Though we all understand the importance of these psychological factors, they are often forgotten in practice (as our empirical data suggest). The disconnect between plans for change and the reality of their implementation was discussed with our informants and are examined in the empirical phase of this paper. Next, we examine the relationship between our focus, CS, and the categories of CM knowledge, as well the contribution of this relation to change implementation.

3. What is change strategy?
3.1 The construct

Among the constructs related to CM, *change strategy* remains unestablished and lacks a definition based on conceptual analysis. However, the use of CS can be found both in many different contexts and, like the macro models of change discussed above, on a more generic level. Owens and Steinhoff (1976) discussed CSs emphasizing problem-solving and social interaction. Chin and Benne (1970) classified CSs into three strategies: empiric–rational, normative–re-educational, and coercive. Dahlin (1978) categorized CSs into those based on authority (coercive or autocratic strategies) and those based on participation (democratic strategies). In his study on the implementation of educational innovation concerning school council reform, Niinistö (1980) applied CS and Dahlin's dichotomy: a fundamental and historical dichotomy that focuses on the meaning of people's participation and can be found in many discussions of CS.

Given this historical view of CS, its use is exceedingly varied; however, amazingly, an analysis of the term's meaning has not been included in the literature on CM. Though searches of 13 international databases of peer-reviewed journals for the term 'change strategy' and its many variations yielded some 350 matches, further analysis revealed no conceptual analysis of the construct itself. Searches of Google Scholar resulted in much more material, but the findings were even more varied. We found that CS is most often used in combination with other terms that tie CS to a certain context, such as strategies of climate change or strategies of changing people's health behavior (examples from our introduction). However, we did identify some articles that could contribute to more general CS theory-building. In a study of 129 organizations, Pries-Heje and Johansen (2015) recognized 10 distinctive CSs, of which the three most commonly used were the specialist-driven strategy, the production-organized/driven strategy, and the learning-driven strategy. McKechnie (1976) emphasized that '[…] complexity becomes an intervening variable affecting the relationship between the change strategy employed and the degree of success with which the change is implemented' (162). The complexity of change is characterized by degrees of dispersal, specialization, radicalness, equivocality, required reorientation, novelty, divisiveness, and forcefulness (McKechnie 1976). For these eight qualities or circumstances, McKechnie (1976) formed propositions for applying a suitable CS (McKechnie 1976). These two sets of CSs exemplify how applied CSs have been recognized by analyzing empirical data ex post facto and how different CSs have been recommended for special purposes based on theoretical reasoning. We could not find research material on the similarities of different CSs, though this was expected given the lack of a standard list of what CSs exist. Moreover, if the field has not defined CS, then it is impossible to know what a CS is and what it is not.

This lack of definitions and conceptual analysis has left the concept of CS vague and ambiguous. This may stem, in part, from the extensiveness of the work defining and contrasting the general term 'strategy', which has perhaps contributed to a feeling of familiarity regarding

CS that has obscured the need to define it specifically. Additionally, we are used to relating CS to executed changes—that is, changes that have been implemented historically—rather than using it to plan for changes to come. In this article, we introduce a different use for CS and propose that it be used especially in planning for change. This will be discussed next.

3.2 Definition of CS in this research

First, we position CS within a conceptual framework of change-related constructs. As this paper transcends theoretical and conceptual analysis, we try to keep the conceptual definitions as simple as possible. First, "'[o]rganisational change" remains an enduring and generic term for all forms of change-related activity in organizations' (By et al. 2014, 3). Under its umbrella is 'change management' (CM), which is widely used despite lacking a commonly accepted definition (e.g. Armenakis & Bedeian 1999). Here, we refer to CM simply as the management of proactive, intentional change processes in managerial contexts (see e.g. Burnes 1992). CM seems to have replaced 'planned organizational change' (introduced by Lewin in the 1940s and 1950s) in the same way that 'managing' has replaced 'planning' in many other disciplines. By 'strategic change', we refer simply to change that is of strategic importance to an organization, with a strategy defined and recognized within the actual context. It is obvious that CS is especially needed in strategic change.

We view CS as an essential aspect of intentional CM. We position our CS on the meta-level: it is not as generic a construct as CM or 'managed change' in general, nor is it a single theory or framework (e.g. sense-making, step models, theories of participation or resistance to change); rather, it is all of these together: systematic and rational exploitation of all we know about change. To elucidate this idea, we present Table 1.

Table 1. Positioning of CS

CONSTRUCTS, THEORIES	CONTENT, LEVEL OF DISCUSSION
Planned change, managed change, change management, change leadership	General level General terms that primarily indicate the intention to manage and control change. General level of discussion on change.
Change strategy, CS	Meta level Meta-level construct for orientation in planning for change. Criteria for rational decision-making concerning change. Criteria for selecting material from the tool level.
Single constructs and theories on different phenomena, operations and processes related to change	Tool level All change-specific knowledge that can be exploited in the planning of intentional change processes according to selected CS.

In Table 1, we refer to CS as contributing to rational decision-making in change. Nevertheless, the overall increasing complexity (e.g. Stacey & Griffin 2005) jeopardizes the endeavors of traditional management to completely manage things and processes. However, complexity theory is a good starting point for change-strategic thinking (e.g. Stacey 1996; Stacey & Griffin 2005). Although our thinking on CS shares many similarities with the ideas presented above, we do not offer another step-model or cookbook recipe for managing change. Instead, we take up some more general-level principles to be employed in decision-making in the planning of change processes.

Based on the ideas presented above and our previous work on change, we argue that:

CS is a set of conscious choices and decisions based on knowledge for creating combinations of principles and means for reaching the best possible outcome in the implementation of the targeted change in a given situation and for understanding the effects of the decisions comprehensively.

So, the question concerns the orientation through which the possible set of principles and means of change implementation are built and reviewed consciously, critically, and in an unprejudiced manner. The definition mostly concerns the change process focused on rational decision-making in a change challenge. It is not self-evident that decisions about change are made consciously and systematically; rather, we often simply select the means we are used to using. It is also important to choose who participates in decision-making, as this is, in itself, a change-strategic decision. The 'principles and means' selected for decision-making to accomplish a targeted change (i.e. the selected CS) form a unique combination. This means that only one combination can be employed at a time, and the potential effectiveness of the other possible combinations will never be known. A historical review of the means and strategies used in previous changes may help in learning about the change, but in a complex world, sticking too closely to past strategies may lead in the wrong direction. In practice, we are often stuck repeating the same actions and strategies. CS as a paradigm of 'planned change' means considering both the decisions regarding the change content and the change process together in the same change-strategic planning process.

CS has a dimensional nature. The principles and means of the change implementation are rarely 'either/or' judgments; rather, they tend to be 'both/and'. This means we may question the quantity of our CS: that is, how much should be decided in any given context. For instance, the participation of employees in change planning is not an 'either/or' issue but instead concerns how participation is directed and its quality (cf. Hampden-Turner 1990; Hampden-Turner & Trompenaars 2000). It is also a matter of reconciling different actors' values in the change-strategic process, which is, accordingly, also a process of values (Hampden-Turner 1990).

3.3 The generic criteria of CS: items for an operational definition

As our reconceptualization of CS cannot be linked to existing theory, models, or practices, we base our search for an operational definition of CS on the ideas in our conceptual definition. Change-strategic action is a social artifact without an exact counterpart, as many different kinds of change actions could be seen as 'change-strategic'. In the operationalization, we can rely on change-theoretic research to only a very general level. Thus, we choose CS criteria that can be justified by generally agreed arguments. Next, we elaborate on the essential points of our conceptual definition to form the generic criteria of CS and the basis for executing the empiric portion of the research.

(1) Orientation: conscious choices and decisions in planning for change

Earlier, in Table 1, we positioned our view of CS on the meta-level. This requires a general and conscious orientation in planning for change, as well as choosing the right tools from the tool level. Together, these are a necessary but insufficient condition and the first step in planning for CS. How can we proceed to choose the means for targeted change in a rational and systematic way if we have no conscious orientation for such a choice? In practice, the failure to recognize a project's change features can lead to several problems.

(2) Using a scientifically reliable knowledge base in CS

It is rational to base change decision-making on knowledge concerning the change and CM. In a complex world, this approach is even more important. Though it is change-strategic to base decision-making on knowledge, it is also change-strategic to admit the boundaries of the knowledge. Just as we accept boundaries in our rationality (e.g. Simon 1996), our CS should prepare for the irrational, and we should also have other CS options. Ready-made models or strategies are often too rigid in a complex world. Thus, we see CS as an open model that directs decision-making toward certain selections but does not restrict it with overly detailed specifications. This leaves space for contextual selections but puts a lot of pressure on individual decision-makers.

The phrase 'decisions based on knowledge' in our definition refers to becoming aware of not only the context of the change but also any 'relevant knowledge' concerning the means of implementation. This links CS-specific knowledge to the psychological, social-psychological, sociological, and educational research traditions, thereby addressing a particularly challenging demand: Scientific knowledge is reliable in principle, but what is relevant in a given situation? Because of the contextuality (to which we return later), 'knowledge' in our definition cannot refer to any particular change knowledge (theory, paradigm, model, etc.). Thus, CS neither includes nor excludes any knowledge, but, rather, leaves the decision to the 'rational decision-maker' (i.e. one who has the orientation to seek it). As the knowledge on change is abundant, rational decision-making is especially demanding.

(3) Contextuality

We emphasize the contextuality and flexibility of CS in a complex world. In traditional, linear strategic thinking, planning begins with various analyses of the environment and its own operations and processes, as well as the identification of critical success factors (e.g. Andrews 1987; Ansoff 1965). Similarly, strategic change demands an awareness of the environment and the context of change, such as people's burdens and their levels of motivation and engagement. According to the strategy analogy, reaching a common view and understanding of a change and its environment is the first phase of planning. More generally, this is related to the contextuality of the change, which is referenced in many of the step-models above (e.g. Kotter 2012).

For contextual reasons, we cannot go too far to fix the CS and move to the tool level. For instance, though employee participation seems to be one of the most favored principles in change implementation, we cannot be sure that it is the appropriate strategy in all situations and contexts. Thus, CS operates here on a more general level: the decision-maker should seek relevant knowledge on how to react to participation in a given situation and context. This contextuality is the reason decision-making is so demanding and rigid, ready-made models fail.

(4) Systemic orientation in decision-making

'Understanding the effects of the decisions comprehensively' suggests a systemic view of the organization, such that activities meant to contribute to a change may affect targets beyond those intended. For instance, change in an organizational structure may have unwanted outcomes on an organization's social system. Too often, we indulge in partial optimization, changing one part rather than seeing the totality. A good CS examines the change challenge from a helicopter perspective and understands the relations of interacting subsystems.

3.4 CS in brief

Contrary to the CSs found in our literature review, our approach is generic and focused on future changes, rather than executed ones. Though its content is not precisely defined, it considers what should be included in planning CS, emphasizing the uniqueness and contextuality of building a CS. The criteria discussed above are summarised in Table 2. The two first categories are selected based on rational reasoning made above, and the criteria are mostly self-explanatory, though some references have been included in the table below to justify their selection.

Table 2. Selected criteria for recognizing CS-type change planning

CRITERION (ARGUMENT OF SELECTION/ REFERENCE)	CONTENT, DESCRIPTION OF CS ACTION
(1) Orientation towards change: conscious decision-making concerning CS options (rational reasoning)	Recognizing the issue in question (development project, etc.) as a change. Sensitivity and ability to identify the features of change in decision-making concerning projects. Being alert for changes.
(2) Basing decisions concerning the change on relevant and scientifically reliable knowledge (rational reasoning)	Exploiting the relevant knowledge on change when selecting the principles and means for the change implementation. Here, we refer mostly to 'theoretical knowledge'; however, decision-makers' own experiences may be 'relevant knowledge' as long as they are consciously and critically reviewed.
(3) Understanding the contextuality of the change (e.g. Bernhardt & Mongrain 2010; Deal & Kennedy 1982; Gino & Pisano 2011; Hoffstede 2001; Karp 2006; Leidner & Kayworth 2006; Nathan & Neve 2009; Sampson & Fytros 2008; Skarlicki et al. 2008)	The special features of the industry and organizational culture and the change history are comprehensively considered, as are the firm's financial and productional situation, organizational climate, and work relations. Further, the workplace well-being and the employees' expertise and competency are reviewed with regard to the requirements of the change. The cultural compatibility and culture risk of the change are critically evaluated.
(4) Systemic orientation in decision-making on change (e.g. Andrew & Moir 1970; Gharajedaghi 1999; Griffiths 1964; Karp 2006; Kuhn 1974; Owens & Steinhoff 1976; Senge 1990)	Change-strategic evaluation is executed comprehensively in an attempt to understand the effects of different subsystems on one another. What are the overall implications of the change for the whole organisation and not only the target system?

The selected CS criteria are types of macro-level preconditions. The first seems self-evident; however, in practice, many problems emerge due to the failure to recognize the features of change in a project. The second criterion is the most essential, as it covers in principle all other aspects of CS. However, this does not require knowing all the knowledge on change; rather, it is more of an orientation towards finding what knowledge can be applied and evaluating the relevancy of the knowledge selected. The second two—the contextuality and systemic views—were selected from innumerable categories of CM knowledge and are justified by the references in Table 2. The selection of these criteria was our way for starting the exploratory research (e.g. Stebbins 2001) and the operationalization of CS, while also opening the general discussion on CS. In the next section, we review how the four criteria of CS are realized in practice.

4. Executing the study

This research is a qualitative case study by nature and was executed mainly in two organizations, though some individuals (consultants) with knowledge of a wider range of organizations and industries were also interviewed. The two case organizations were large ones: one was private (Pri) and the other was in the field of public administration (Adm). We selected large organizations as these often execute extensive change and development projects and are likely to have more specialized resources for CS planning. At the request of the case organizations and to ensure open discussion, it was agreed that the organizations would remain anonymous. Thus, we cannot provide more detailed information about them.

In considering who (which positions) might have views on change implementation, we chose human resource (HR) specialists or change managers (if there were any). We felt that, among other possible specialties with their corresponding educational streams and change-specific contents, especially behavioral sciences, HR specialists held the most relevant basic education, as they are trained to know about an organization's human resources. Moreover, one of the roles that is often assigned to HR is that of 'change agent' (Ulrich et al. 1995). Although top management usually makes the decisions regarding change content, HR is usually involved in change implementation. Consultants are also heavily involved in change; thus, some were interviewed in addition to the case organizations. Of the 30 total interviewees with the case organizations, 24 were HR specialists, and the rest were managers who faced change challenges in their line organizations. The average age of the interviewees was approximately 40 years, and the great majority (23) were women. The informants' education level was high, with 24 out of 30 holding at least a master's degree. One feature of change professionalism is that there is usually no special education for it: Although many academic sciences contribute to the understanding of change, change seems to be multi-scientific in nature.

In the data collection, we applied a semi-structured depth interview (SSDI; Wengraf 2001) conducted by one researcher only. The interviews were recorded and transcribed. In charting this research on CS, we used the classifications introduced in Table 2 to form the interview themes. The subject was discussed using the following themes both indirectly and directly.

- In charting the change orientation (theme 1), we discussed how typical it was to recognize projects and development programmes as changes and to systematically analyze change challenges.
- In connection with the exploitation of change-specific knowledge (theme 2), we first discussed the interviewees' basic education how it supported acting as a change specialist. We also discussed the exploitation of change-specific theoretical knowledge in decision-making in change implementation. By the theoretical knowledge of change, we referred to the broad research observations or frameworks meant to contribute to the understanding of change challenges.
- The next theme for discussion was the interviewees' holistic and systemic view in reviewing change (theme 3). We first discussed what we meant by the holistic, comprehensive, and systemic view of change and then reviewed how the informants actually acted in this respect.
- With regard to contextuality (theme 4), we discussed how carefully various contextual factors (organizational culture, well-being, workload, energy for the change, etc.) were usually reviewed in planning for change.

- We also discussed concrete change projects executed in the organization and asked for stories about them. In this way, we obtained information about how the projects had been planned and decided and gained a chance to indirectly evaluate the projects from a change-strategic point of view.

In analyzing the interview data, the informants' comments were first related to the CS criteria in each of the themes. We applied a broad version of the framework analysis approach (cf. Lacey & Luff 2007) to chart the idea, as our operational definition of CS was tentative. Then, we searched for themes other than those that were pre-defined; however, since the interview contents could be classified into the given categories, there was no need for forming new categories, and no new criteria emerged. The analysis was based on reading the transcribed text several times. We aimed to achieve a hermeneutic understanding of the big picture, rather than an exact classification of single comments. We considered this approach appropriate for our exploratory research.

5. Results

The aim of the empirical phase of our research was twofold: to test the relevance of the four criteria we had chosen for CS and to review whether these CS criteria (components) were really in use when planning for change implementation in practice. As explained in the introduction, the question concerned the 'testing' of one tentative operationalization of CS.

5.1 Orientation towards change

In this phase, we formed the constructs of the *change mindset* and *orientation towards change* to describe how typical it was for the interviewees to review and regard different projects as changes and to recognize their change-specific features. We assumed that using change-based verbalization and constructs together with 'projects' (e.g. development and training projects) would influence our orientation towards change. This theme was introduced by asking, 'How often do you think of your strategic or operative projects as changes? Or do you not think of this at all and just start doing?' The most common answers to this question could be crystallized as: 'I have not happened to think about it'.

> Pri11: *Do we think that this [the project in question] is a change? Not for sure. At least we don't use that word […] As collisions happen, we notice that, 'Aha, this is a big change for the other party'. […]*
> Pri4: *I just start doing the project [without thinking about whether it is a change or not].*

We have a long tradition of different development projects, and the answers gave the impression that the informants' and top management's focus was on content and economic issues, or 'what issues'. By comparison, 'how issues', which would reflect an interest in the change process and in realistic possibilities for implementing change, were rare. Many of the informants thought that being more alert to recognizing features of change in projects would impact the planning of the implementation process. The informants also saw projects emerge 'as given' by management, which could affect how creatively and spontaneously the implementers reacted to the process planning. Above, we referred to the need to see the whole change process—both content and process decisions—as unified. A more integrated, holistic view on change might contribute to change-strategic planning and ground any review of the success of implementation more deeply in reality.

5.2 Utilising knowledge on change: change-strategic expertise

The inclusion of the use of change-specific knowledge in CS criteria is related to common endeavors to rely on real knowledge in decision-making (cf. Elster 1989; Paronen 2015). It is also closely related to the competencies of change: the orientation to recognize, select, and exploit knowledge relevant in the focal change context. As noted above, the nature of change knowledge (like knowledge concerning management in general) challenges its users to employ critical and analytical thinking. Since this is often arduous and working life is busy, decision-makers often deploy the simple and fashionable '-isms' of their consultants. This seems related to the differences in people's basic education and orientations toward theoretical and analytical deliberation.

The answers and immediate reactions to the question 'How often do you benefit from theoretical knowledge of change [what 'theoretical knowledge' meant was discussed] in your decision-making?' were generally very short and clear. In practice, the informants did not lean on theories or models of CM and viewed any connection to the construct and theoretical world of change as subconscious.

> R: *[…] so you feel that you don't have such know-how and competence of the CM theories that you could exploit in the changes?*
> Pri4: *I feel that I cannot wrap it up […] I think I don't take it up very strongly… it is not conscious so that I would take up a tool book to talk about [it].*
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> R: *Do you see that you can benefit from theories and models [on change]? Do you lean on such stuff?*
> Pri12: *At present, no, at least not consciously. But I'm sure it would be useful for understanding the phenomenon.*

Further, experiences of exploiting knowledge of one's basic education in change were rarely reported. Of the 30 informants, 8 had an educational background that could, in principle, be exploited in CM; however, nearly without exception, they did not connect their own change actions with their basic education. When asked, the informants usually felt that they were no better 'masters of change' than other members of the organization, such as line management. Many referred more often to an individual's personal qualities and interests in this respect. However, human resource development (HRD) specialists seemed to have some special expertise in change implementation. This is because of HRD's usual role in change: once top management has decided on a change, HRD is employed in the implementation. Accordingly, the question seems to be one of learning by doing. Since many of the informants outside HRD felt that they had very little to do with change (since they had other, more urgent responsibilities than those of change), they were unable to develop any change-strategic expertise. We argue that this is a challenge in working life in general: organizations' change competencies are not systematically developed or assigned to any member or group. Instead, these responsibilities are often given to an outside consultant, an approach that does not develop an organization's own CM competencies. An essential part of strategic competency is the ability to change and be agile in implementing strategic projects, and one strategy for achieving this is to build change-strategic competency in an organization's own resources, such as HR (cf. Morris 1996). Though they had not considered it before, the conversations made many informants see the importance of an organization's change-strategic competence.

5.3 Contextuality in change and CS

The construct of *contextuality* is pervasive and multidimensional; however, rather than giving it an exclusive definition, we decided to see which emerging issues could be classified in this category. The theme was generally introduced in the interviews by a question like, 'What kinds of things do you see as important in affecting decision-making on change?' The first category to emerge was related to power issues and is can be exemplified by the following expression: 'Those in charge of planning of change implementation must have genuine power'. In the case of HR, for instance, this meant endeavors to reach an authorized position in the top management team and to win credibility by successfully functioning in change. This contextual factor relates more generally to the strategic culture of an organization. Moreover, it is structural and may be rigid with regard to change.

Another category of contextual factors to emerge related to more situational issues, as mentioned in Table 2. A heavy workload, lack of time, and disturbances in the production processes were the most frequently mentioned contextual factors hampering the rational implementation of change. Too many changes at a time and a lack of coordination in their execution also emerged as implementation problems. These issues negatively impacted employees' well-being and motivation for change. From a change-strategic point of view, none of the informants considered the importance of preparing for contextual factors or including contextual analysis in implementation planning. It is remarkable that, though everyone seemed very aware of the various contextual factors, systematic CS was missing.

5.4 Systemic, comprehensive orientation on change

The decision to include a systemic view on change in the CS criteria is supported by extensive literature and research material (e.g. Andrew & Moir 1970; Gharajedaghi 1999; Griffiths 1964; Karp 2006; Kuhn 1974; Luoma 2006a; Owens & Steinhoff 1976; Senge 1990). A systemic view emphasizes a comprehensive or helicopter perspective, which means seeing the side effects of a planned change and understanding the meaning of a critical review of the joint effects of an action. Often, this means also breaking the boundaries of organizational structures (e.g. departments, units, or administrative subdivisions), which might be very challenging in, for example, bureaucratic public organizations.

The informants seemed very aware of the meaning of a holistic view on change. Some felt they had an ability to compose themselves in a helicopter perspective and believed that this is an important aspect of a change specialist's expertise. We hypothesize that this more comprehensive orientation may be due to the majority of the interviewees having a degree in social science or education. Even when the meanings of holistic and systemic orientation were understood, the interviewees' organizations generally did not view consideration of the totalities in changes as good.

> R: *How about taking into account the systemic view and problems of partial optimisation [explained] in change? Is everything smartly in control in this respect?*
> Pri2: *Not in smart control at all… when we change something, it may deteriorate things elsewhere […] This word, 'partial optimisation', describes things well. [For instance], if we give people incentives only for having satisfied customers, everything else may be neglected, so we would have lots of satisfied customers, but the bottom line is negative.*

The informants also described their experiences and failures in reaching a comprehensive view. They saw the need for more holistic preparation but found that, for one reason or another (usually time constraints), management had pushed the changes through as quickly as possible. This approach, prevalent in organizational culture, can create barriers to a more comprehensive approach to change. To conclude, our material revealed that a 'systemic view of change' as an important criterion of CS was not optimally realized.

6. Conclusions

As CS is neither an established construct nor a well-defined phenomenon, it is only natural that our research is explorative by nature. Our aim was to refresh and reconceptualize the commonly but confusingly used concept and to tentatively chart and experiment with the idea. Accordingly, it was clear and in line with expectations that we could not identify a conscious and 'pure CS' as we defined it (i.e. concerning both the process of making it and the documentation of CS as an end product, as most organizations have concerning their strategy). Instead, we examined features of change-strategic thinking as operationalized above. From the interviews, we observed only minor indicators of change-strategic thinking and action. CS is a theoretical and difficult construct, and it is natural that change actors and even specialists approach change from more practical starting points. However, it is comforting that, when taken out of its theoretical frame and described in practical terms, change-strategic thinking was regarded as reasonable.

From a research point of view, the thinking introduced above includes many open questions, the most important of which is the operationalization of CS. Which things should be included in the criteria of CS, and which things are the most essential to make decision-making on change 'change strategic'? With respect to strategy (i.e. business strategy), it is difficult or even impossible to find absolute criteria for the quality of a strategy, an issue that also concerns CS. The criteria introduced above were both scientifically arguable and very general. So, what is new? First, our entire approach is novel, since we could not find any examples of similar change-strategic scrutinizing in the literature. Second, our data indicate that systematic exploitation of change-related scientific knowledge is not yet routine, even though the exploitation of relevant knowledge should be the starting point of all the change-strategic thinking, as it encases all other CS criteria. Knowledge of change is hierarchic by nature, and wide totalities reveal innumerable groups of single observations, which are, in turn, often refined into procedures. Ideally, our position on the theories and models of change should be curious and positive, but also analytical and critical.

The empirical observations of this research can and should be discussed critically. The research faced the same pitfalls as other qualitative interview-based reviews: the informants had their own subjective realities of change, about which we made subjective interpretations. In this case, we were very aware of this limitation and tried to avoid misinterpretations. As the data were gathered from only two case organizations, we did not strive for generalisability and transferability; rather, we sought to expand our view and increase the face validity (Eriksson & Kovalainen 2008; Gravetter & Forzano 2012) of our research. For this, we interviewed five people with wide experience in a variety of industries (three were consultants). Generally, with respect to the industries in which the informants had worked, our observations were valid and new. The four criteria we chose for CS were found to be reasonable and useful in planning for change implementation. However, this was only the first experiment with the selected criteria; future work should aim to complete and test the idea of the criteria. Further, the relation

between the meta-level (which we could also call the 'orientation level') and the tool level (i.e. the concrete selection of means for change) needs more theory-building and empirical testing. This is especially important for creating practical tools for managers.

The most important contribution of our research is its reconceptualization of CS and the endeavor to give it more systematic and generic content. Previous definitions often connect CS to one historical change at a time; we could not find more generic examinations connecting CS dynamically to planning for change implementation. Even our own empirical data did not allow conclusions on the commonness or quality of the change-strategic thinking, despite the emergence of a contradiction between CM theory and its exploitation. To proceed on this path, more research should focus on the operationalisation of CS and its empirical testing. Few things in modern society that are more important than the quality of change implementation, and we should welcome all progress towards its development.

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