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Case Study as a Suitable Method to Research Strategy as Practice Perspective

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Abstract

The goal of this study was to comprehend how case studies are used to analyze strategy as practice perspective phenomena inside organizations. Through a narrative review, associated with a systematic analysis of the literature, we revisited papers published in high index management journals that have presented the case study as method to analyze phenomena from the strategy as practice perspective. We understand that the case study method was used appropriate to analyze in-depth phenomena concerning the perspective of strategy as practice. Both, the method, and the strategy as practice perspective look at the phenomena in their singularity. This study contributes to reveal that the case study method has the power to study reality in the field of research, such as dynamic social process, micro activities (routines), individual behavior, interactions, and processes.

Keywords

strategy as practice, case study, theoretical review, qualitative research

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Case Study as a Suitable Method to Research Strategy as Practice Perspective

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The goal of this study was to comprehend how case studies are used to analyze strategy as practice perspective phenomena inside organizations. Through a narrative review, associated with a systematic analysis of the literature, we revisited papers published in high index management journals that have presented the case study as method to analyze phenomena from the strategy as practice perspective. We understand that the case study method was used appropriate to analyze in-depth phenomena concerning the perspective of strategy as practice. Both, the method, and the strategy as practice perspective look at the phenomena in their singularity. This study contributes to reveal that the case study method has the power to study reality in the field of research, such as dynamic social process, micro activities (routines), individual behavior, interactions, and processes.

Keywords: strategy as practice, case study, theoretical review, qualitative research

Introduction

Traditionally, the discipline of strategy has dealt with its issues as something that the organization has: the organization applies strategy in one way or another (Whittington, 2003). Strategy studies to date have addressed the macro aspects of the organization, in which the complexity of the strategic process is reduced to some causal variables, leaving aside the evidence of human actions interactions. Thus, the field of strategy needs to show a much more micro-level, in-depth phenomena (Johnson et al., 2003).

In the strategy as practice perspective (Jarzabkowski et al., 2007; Whittington, 1996), research has emerged termed as Strategy as Practice (SAP), or strategizing, in which the topics addressed are the actions and interactions of the individuals practicing the strategy. From these studies, strategy thus, is viewed as something that people do, instead of something the firm has (Whittington, 2006).

Considering focusing in practices, more researches are required to have a closer look at organizations, observing the daily routines and activities, claiming for qualitative analysis more than large statistical databases. In this way, Whittington (1996) highlight that the adoption of case studies is suitable as a method to detail the implementation of strategy providing insights to managers in their decision-making process.

Aligned to this approach, we believe that case study is an appropriate method to understand what happens inside organizations through the strategy as practice perspective, providing elements to researchers to examine the actions and interactions in the social context and the routines that constitute the daily organizational life (Jarzabkowski, 2003).

Authors such as Baxter and Jack (2008), Daughtery (2009), and Gaikwad (2017) have emphasized the potential and how rigorous a case study must be to approach in-depth phenomena. Morse and McEvoy (2014), for instance, have evidenced that the case study is an appropriate qualitative methodology for research and practice in sport management. However, how the case study is used to understand phenomena from the strategy as practice perspective is still under researched.

Following the idea that it is necessary to go inside the organization where things are being performed by people to understand how these phenomena occur, in the moment they are generated, and considering that case study approach is applicable method to exam in-depth phenomenon we elaborate the following research question to guide our study: how are case studies used to analyze strategy as practice perspective phenomena inside organizations?

To answer the research question, we developed a narrative review of the literature associated with a systematic analysis in leading management journals where we revisited papers that have presented the case study as method to analyze the phenomenon through the strategy as practice perspective inside organizations.

We understand that the case study is a suitable method to perform an in-depth analysis of phenomena when it concerns to the strategy as practice perspective, once it analyzes the case in its singularity as it does the studies of strategy as a social practice, shedding light on the actions and interactions, individual behaviors, the routines or specific strategic episodes and decision-making processes inside organizations. Thus, we took well-known works and showed how the case studies were applied when the perspective used was the strategy as practice.

This study contributes to the qualitative research literature to reveal that qualitative methods, such as case study, have the power to study reality in the field of research, because it studies the phenomenon at an in-depth level, such as dynamic social process, micro activities (routines), individual behavior, interactions, and processes.

This work is structured as follows: in next section, we present a brief theoretical review about strategy as practice perspective followed by the review of case study method in a qualitative approach; then, the methodological procedures of this study are exposed and, in the last sections, the results and discussion of these analysis are presented. We close this with final remarks, presenting some contributions, limitations and future avenues of research are pointed out.

Strategy as Practice Perspective

The strategy as practice or strategizing is composed by a group of interdependent actors (Whittington et al., 2003), who carry out activities insofar as the results of their actions and interactions contribute to the organizations to reach their objectives, to guarantee their survival (Johnson et al., 2003). Even if these strategic activities are formally planned and elaborated, they are considered as a practical strategy from the moment they start bringing results to the organization (Jarzabkowski et al., 2007).

Studies on strategy as practice gained importance in the scientific community through the focus on the interaction between agents and micro activities carried out within organizations. These studies focus on the analysis of three main elements: practice, praxis, and practitioners. It is at the intersection of these elements that the strategy formation process occurs, that is, strategizing (Jarzabkowski et al., 2007; Whittington, 2006).

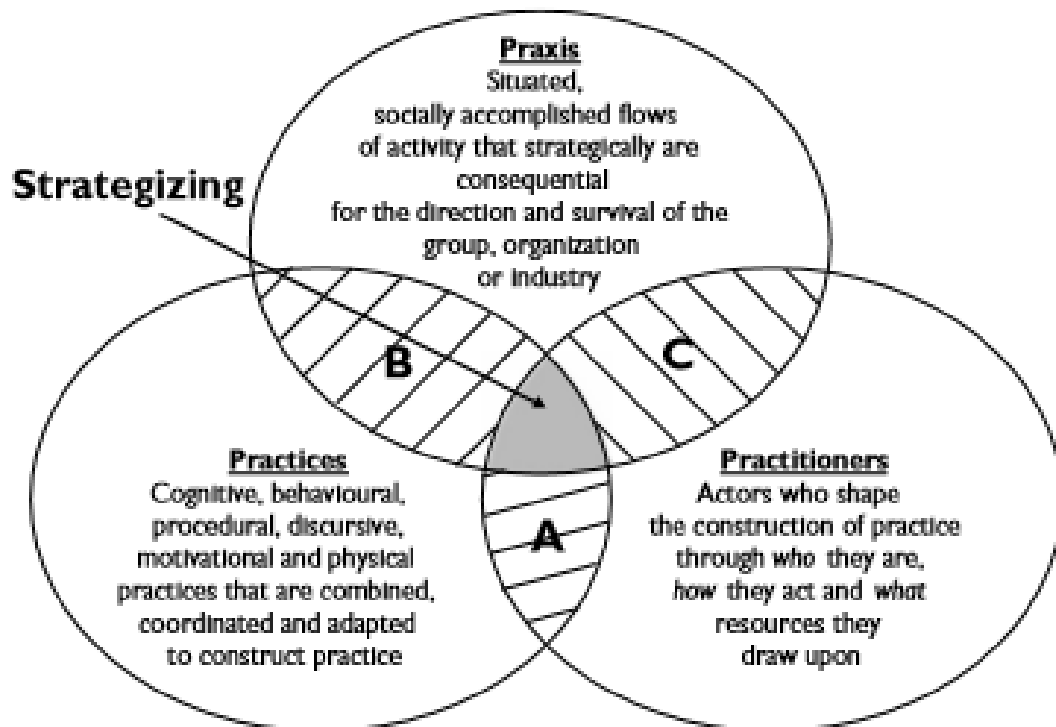
Practice is the understanding of the activity provided by behavioral, cognitive, discursive, and physical sources through which multiple actors can interact and socially achieve collective goals, it means how the strategy is constructed (Jarzabkowski et al., 2007). It is also the routine of behavior, including traditions, norms, and procedures (Whittington, 2006). Praxis is the flow of activity developed by people (Whittington, 2006). It refers to a term that describes

human action in its entirety; according to Jarzabkowski et al. (2007), praxis is the interconnection between the action of different and dispersed groups, individuals, and the organization within which these individuals act and contribute. Practitioners, or the actors themselves, are the individuals who practice the strategies, they are the ones responsible for practicing (Whittington, 2006) and, therefore, they are intertwined with practice and praxis elements. They are units of analysis since they are active participants in the construction of activities that are consequences for the survival of the organization (Jarzabkowski et al., 2007).

Jarzabkowski et al. (2007) present in Figure 1 that strategy as practice or strategizing occurs in the link or connection between practice, praxis, and practitioners.

Figure 1

A Conceptual Framework for Analyzing Strategy as Practice



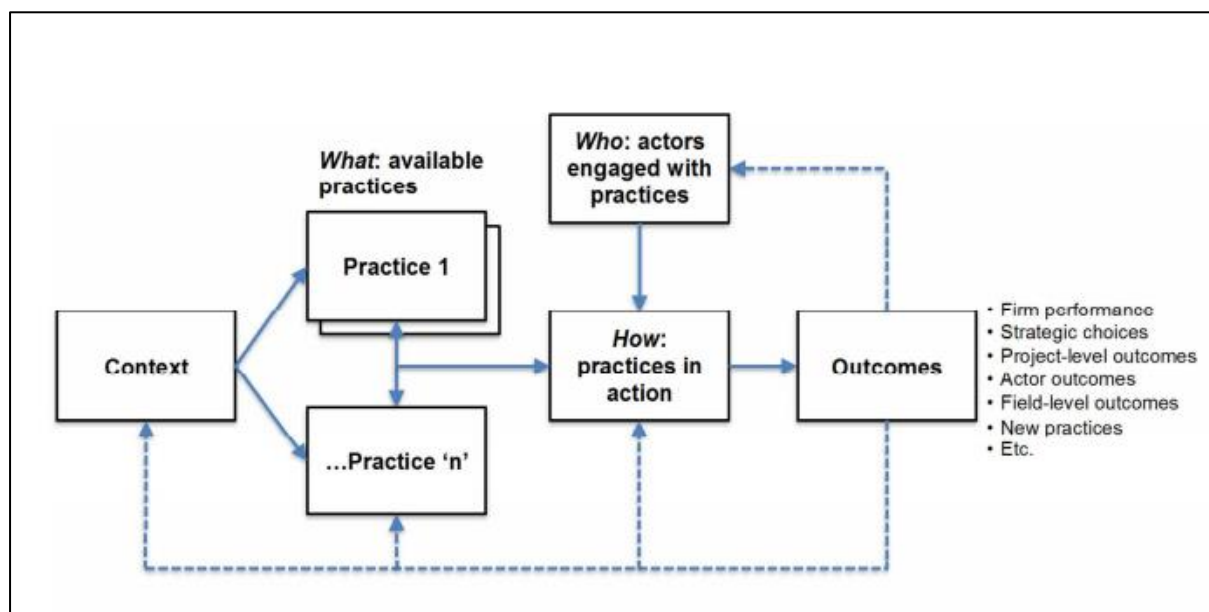
Strategizing comprises the nexus between practice, practices and practitioners. A, B, and C represent stronger foci on one of these interconnections depending upon the research problem to be addressed

Note. Jarzabkowski et al. (2007, p. 11)

Jarzabkowski et al. (2016) challenged the Practice-Based View of Strategy (PBV) suggested by Bromiley and Rau (2014) as they focused on practices as stand-alone phenomena and offered an integrative scheme to approach not only the practices but also the praxis and the practitioners of the strategy. As a complement to the practices, the scheme recognizes the links between practices, the ways in which they are engaged, who engages them and their potential outcomes. According to Jarzabkowski et al. (2016), to achieve results, companies cannot look only at the practices performed but also at how the practices have been done and by whom. This scheme is shown in Figure 2.

Figure 2

A Schematic Structure of Strategy as Practice



Note. Jarzabkowski et al. (2016, p. 17)

In summary, the scheme shows that there is an interdependence between how and by who the practices are performed with the results of the organization and that without the appreciation of the mutual dependence, strategy research may misattribute the performance differentials and offer misleading advice to strategy practitioners (Jarzabkowski et al., 2016).

Many case studies have been developed to examine strategy as practice where they analyze the interactions among practices, praxis, and practitioners in organizations. We address this methodological strategy in the following section.

The Case Study Method in a Qualitative Approach

According to Yin (1989, 1993), the case study can be defined as a research strategy that is characterized by studying the phenomena as a dynamic process, within its real context, using several sources of evidence, to explain the phenomenon observed globally and considering its complexity. According to Yin (1989), individual, organizational, social, and political phenomena can be better understood with the contribution of the case study.

To Stake (2000), the case study concerns a choice of what will be studied, that is, the case. As a form of research, the case study is defined by the interest in individual cases, not by the research method used (Stake, 2000). In this line, Patton (2000) underlines that gathering comprehensive, systematic, and in-depth information about each case is the intend of case studies.

In general, case studies represent one, among others, strategy method when researchers have questions such as “how” and “why,” mainly when events are difficult to be controlled and the phenomena are inserted in a real and contemporary context in organizations (Yin, 1989, 1993). Despite what Yin (1993) emphasizes concerning that to examination of a case, if your interest is more in understanding “how” and “why,” other research methods could be adopted, such as grounded theory, for instance. Therefore, we understand that grounded theory is an option to investigate subjects that have not well developed yet or that there aren’t enough elements about to be analyzed, following the idea of build a new theory.

Another point is that most research could involve questions of how and why, but we emphasize that we are focusing on qualitative methodology and in this line, we could compare with *what* questions that would guide to a quantitative investigation. Anyways, several different methods could be adopted but we are intrigued in how case studies are used to analyze strategy as practice perspective phenomena inside organizations.

Hartley (1994) points out that the main terms and conditions of use of this method are: (i) to explore social processes as they occur in organizations; (ii) to perform a dynamic, contextual and generally longitudinal analysis of several different actions and meanings that take place within organizations; (iii) to understand the social processes in their organizational and environmental context; (iv) to explore new processes and/or behaviors that are not well understood; (v) to capture the emergent and immanent properties of life in organizations and; (vi) to exploit organizational behavior that is informal, unusual, secret, or even illicit.

According to Lavarda and Balbastre (2009) and Pérez-Aguiar (1999), in line with Yin (1989), the project of a case study has six stages: (i) to establish the objectives of the research; (ii) to establish the theoretical framework of research; (iii) to define the unit of analysis; (iv) to select the cases that will be the object of the study; (v) to study a pilot case and; (vi) to draw up a case study protocol. In the latter case, Pérez-Aguiar (1999) states that sources of evidence (people, documents, direct observation, interview or questionnaire - structured or semi-structured, etc.) and data collection procedures (which may be extended beyond mere collection of data, including aspects that affect access to the organization, such as the way the company is received, the ease or difficulty in obtaining the information, the knowledge of the interviewee) must be defined and anticipated in advance. It is also necessary to define whether an interview or questionnaire (structured or semi-structured) will be used.

In order to have proven quality, the case study seeks: (i) to use multiple sources of evidence that must come from two or more sources, but converging in relation to the same set of facts or discoveries; (ii) to establish a chain of evidence or explicit links between the questions asked, the data collected and the conclusions reached and, (iii) to use replication logic in multiple case studies with a case study protocol (Yin, 1989).

Patton (2000) also mentions about the data collection and states that case data consists of a selection of all the information collected through interview, direct observations, and documentary data, besides impressions and statements of others about the phenomenon analyzed. Yet, according to Stake (2000), to reduce misinterpretations, researchers can employ different procedures triangulating them to certify the clarity and validity of their own communication from the collected data, as well as avoiding the redundancy of data gathering. In this sense, we make a linkage of the case study as a proper method to understand in-depth phenomena in the strategy as practice perspective inside organizations.

Methodological Procedures

The goal of this study was to comprehend how case studies are used to analyze strategy as practice perspective inside organizations. To achieve the objective, we revisited papers published in high index management journals that have presented the case study as method to analyze phenomena from the strategy as practice perspective inside organizations.

Firstly, we searched articles in international databases such as Ebsco, Sage, Scopus, Science Direct, Web of Science and Strategy community site: strategy as practice (www.s-as-p.org) combining the following keywords: strategy as practice, strategizing, strategic practices, and case study. We considered relevant papers in the following international journals Academy of Management Journal (IF: 7.191); Journal of Management Studies (IF: 5,839), Industrial Marketing Management (IF: 4.779), British Journal of Management (IF:4.779); Organization Studies (IF: 3.543); Human Relations (IF: 3.367); Long Range Planning (IF: 3.363); Strategic

organization (IF: 3.109); European Management Journal (IF: 2.985); Scandinavian Journal of Management (IF: 1,415).

The data sources described above were chosen because they are representative in the international context promoting the dissemination of research of organizational and management studies.

The articles obtained by the search strategy were evaluated according to the following criteria: (i) They deal with the theme “strategy as practice,” “strategizing,” and “strategic practices”; (ii) Use the case study as a research method strategy.

In the first step, through the keywords in the databases mentioned above, 94 articles were collected among essays and case studies between the years 2003 and 2017. After this first collection, a screening was done to verify which of the articles used the case study as the method to analyze inside organizations. There were then, 27 articles selected as shown on Table 1. The papers are presented in a chronological order.

Table 1
References Selected

N ^o	Author(s)	Article title	Source	Year	Data collection source
1	Jarzabkowski	Strategic Practices: An Activity Theory Perspective on Continuity and Change.	Journal of Management Studies IF:5.839	2003	Interview, observation, ethnographic data, documents, and archival data.
2	Salvato	The Role of Micro-Strategies in the Engineering of Firm Evolution.	Journal of Management Studies IF:5.839	2003	Interviews, documents, direct observation
3	Maitlis & Lawrence	Orchestral Manoeuvres in the dark: Understanding failure in organizational strategizing.	Journal of Management Studies IF:5.839	2003	Direct observation of meetings and rehearsals, Interviews with orchestra managers, and other key actors, and extensive documentary analysis
4	Samra-Fredricks	Strategizing as Lived Experience and Strategists' Everyday Efforts to Shape Strategic Direction.	Journal of Management Studies IF:5.839	2003	Ethnography, close-up observation, conversation analysis, recording of the routines.
5	Régner	Strategy Creation in the Periphery: Inductive Versus Deductive Strategy Making* inductive versus deductive strategy making	Journal of Management Studies IF:5.839	2003	Personal observation, semi-structured in-depth interviews, company documents and archival data.
6	Rouleau	Micro-Practices of Strategic Sensemaking and Sensegiving: How Middle Managers Interpret and Sell Change Every Day.	Journal of Management Studies IF:5.839	2005	Semi-participant observations, semi-structured interviews, and document analyses.
7	Mantere	Strategic practices as enablers and disablers of championing activity.	Strategic Organization IF:3.109	2005	Semi-structured interviews.
8	Sminia	Strategy formation as layered discussion.	Scandinavian Journal of Management IF:1.415	2005	Direct real-time observation, formal interviews; the collection of ethnographic data from casual observation, and document analysis.

9	Balogun & Johnson	From intended strategies to unintended outcomes: the impact of change recipient sensemaking.	Organization Studies IF:3.543	2005	Interviews, direct observation, and documents analysis.
10	Hoon	Committees as strategic practice: The role of strategic conversation in a public administration.	Human Relations IF:3.367	2007	Observations in meetings and workshops, semi-structured interviews, and documents analysis.
11	Laine & Vaara	Struggling over subjectivity: A discursive analysis of strategic development in a group.	Human Relations IF:3.367	2007	Participant observation, all kinds of company documents and target interviews.
12	Paroutis & Pettigrew	Strategizing in the multi-business firm: Strategy teams at multiple levels and over time.	Human Relations IF:3.367	2007	Interviews.
13	Stensaker & Falkenberg	Making sense of different responses to corporate change.	Human Relations IF:3.367	2007	Interviews, observations, and secondary information.
14	Sillince & Mueller	Switching strategic perspective: Reframing of accounts of responsibility.	Organization Studies IF:3.543	2007	Interviews, documents analysis and observations.
15	Jarzabkowski	Shaping strategy as a structuration process.	Academy of Management Journal IF:7.191	2008	Interviews, documents analysis and observations.
16	Jarzabkowski & Seidl	The Role of Meetings in the Social Practice of Strategy.	Organization Studies (IF:3.543)	2008	Observations, interviews, documents analysis.
17	Jarzabkowski & Balogun	The Practice and Process of Delivering Integration through Strategic Planning.	Journal of Management Studies (IF: 5.839)	2009	Interviews, documents analysis and observations.
18	Hendry, Kiel & Nicholson	How boards strategise: A strategy as practice view.	Long Range Planning (IF: 3.363)	2010	In-depth and semi-structured interviews.
19	Jarzabkowski, Spee & Smets	Material artifacts: Practices for doing strategy with stuff.	European Management Journal (IF:2.985)	2013	Non-participant observation, interview, and documents data.
20	Aaboen, Dubois & Lind	Strategizing as networking for new ventures.	Industrial Marketing Management (IF: 4.779)	2013	Interviews and documents (secondary data) analysis.
21	Paroutis, Franco & Papadopoulos	Visual interactions with strategy tools: producing strategic knowledge in workshops.	British Journal of Management (IF:4.779)	2015	Direct observation, interviews, and video-audio recording.
22	Werle & Seidl	The Layered Materiality of Strategizing: Epistemic Objects and the Interplay between Material Artefacts	British Journal of Management (IF:4.779)	2015	Interviews, direct observation, photography, and documents analysis.
23	Jarzabkowski, Burke & Spee	Constructing Spaces for Strategic Work: A Multimodal Perspective	British Journal of Management	2015	Ethnography observation, videorecording, and interviews.
24	Tidström & Rajala	Coopetition strategy as interrelated praxis and practices on multiple levels.	Industrial Marketing Management (IF: 4.779)	2016	Interview and documents analysis

25	Darbi & Knott	Strategising practices in an informal economy setting: A case of strategic networking.	European Management Journal (IF: 2.985)	2016	interviews, observations, shadowing, secondary data, and everyday ethnography.
26	Concannon & Nordberg	Boards strategizing in liminal spaces: Process and practice, formal and informal.	European Management Journal	2017	Interviews.
27	Pfister, Jack & Darwin	Strategizing open innovation: How middle managers work with performance indicators.	Scandinavian Journal of Management (IF: 1.415)	2017	Observation and interviews.

The analysis was carried out through the narrative review of the literature seeking to discuss the development of cases. This review seeks to promote the advancement of knowledge in the field of strategy (Jarzabkowski & Spee, 2009; Langley, 1999) since the narrative review of the literature is based on the abundance or scarcity of information about a given topic, as well as the divergence of opinions or the lack of consensus (Green et al., 2006).

To analyze the papers selected, we have categorized the articles into five themes, or categories, that have been mostly used by the research using strategy as practice perspective, which are: (i) dynamic social process; (ii) close look at micro activities (routines); (iii) individual behavior; (iv) interactions and (v) how processes occur. Although the strategy as practice perspective studies includes all these categories (Jarzabkowski, 2005; Jarzabkowski et al., 2007; Johnson et al., 2003; Whittington, 2006), sometimes even together, we decided to separate them to present the analysis in a structured and clear way indicating how they developed the case study as the research method to explain the real-life phenomena.

In Table 2 we expose the similarities between the case study and strategy as practice perspective in relation to the categories approached.

Table 2.
Categories and Similarities between Case Study and Strategy as Practice Perspective

Categories	The Case Study	The Strategy as Practice Perspective
Dynamic Social Process	Studies the phenomena as a dynamic process (Yin, 1989). Explores social processes as they occur in organizations (Hartley, 1994).	Studies the strategy as a social process (Jarzabkowski, 2005; Whittington, 2006).
Close look at micro activities	The purpose of case studies is to gather comprehensive, systematic, and in-depth information (Patton, 2000). It is used when the interest is the particularity of a case (Stake, 2000).	Observes the phenomena at a close range and it cannot be understood from a distance (Whittington, 1996; Jarzabkowski, 2005). Close look at the micro level phenomena (Johnson, Melin & Whittington, 2003; Whittington, 2006; Jarzabkowski, et al., 2007). The strategizing perspective needs to trace the detailed micro activities which constitute the day-to-day activities of individuals that make up strategies (Whittington, 2003)
Actions and Interactions	Contributes to understanding the individual, organizational, social, and political phenomena (Yin, 1989). It may be used to analyze several different actions (Hartley, 1994). Provide a better understanding of the phenomena (Stake, 2000).	Analyzes the human actions and interactions of individuals practicing the strategy (Whittington, 2006; Jarzabkowski et al., 2007). It studies the construction of the flow of activities and interactions of multiple actors and the practices on which they are based (Jarzabkowski et al., 2007).

Individual behavior	Explores new processes and/or behaviors that are not well understood as well as exploiting that organizational behavior that is informal, unusual, secret, or even illicit (Hartley, 1994). Well-structured case studies are holistic and context sensitive and can be individuals, groups, organizations, cultures, regions, or nation-states (Patton, 2000).	Understands the behavior of the members involved in strategizing (Jarzabkowski et al., 2007).
How processes occur	Used when researchers who have questions such as <i>how</i> and <i>why</i> (Yin, 1989).	Understands <i>how</i> strategy is constructed (Jarzabkowski et al., 2007).

In the next section we present the result of the narrative analysis from those categories applied to the papers previously selected.

Result Analysis and Discussion

This section presents how case studies were used in the selected papers to analyze strategy as practice perspective phenomena inside organizations, that is, case studies were used to analyze phenomena such as (i) dynamic social process; (ii) close look at micro activities (routines); (iii) individual behavior; (iv) interactions and (v) how processes occur.

Dynamic Social Process

Starting with the dynamic social process category, we found one paper that addressed the theme (Smínia, 2005). The study used the case study as methodological approach to explain the processes of the organizations happening in real-time, from the practice lenses, showing the dynamic process within its real context as suggested by Yin (1989). According to Johnson et al. (2003), the activity-based view considers the processes and investigate what really is done inside organizations by practitioners through their actions and interactions. In this topic, the researchers used almost the seven sources of evidence mentioned by Yin (1989) once all sources provide in-depth comprehension about the phenomena (Morse & McEvoy, 2014).

In this sense, Smínia (2005) analyzed the day-to-day activities comprising the strategy process at the senior management level in a construction company of the Netherlands. To understand it from an in-depth perspective, the author collected ethnographic data from direct interviews, casual observation, and document analysis. All sources provide in-depth comprehension about the phenomena (Morse & McEvoy, 2014).

Micro Activities - Routines

The second issue approached by the authors were the routines inside the organization, where three authors made an in-depth observation of what was done and by whom (Rouleau, 2005; Salvato, 2003; Samra-Fredericks, 2003). According to Whittington (1996), a close observation of what strategists do in their strategy routines is needed to understand strategizing better.

Salvato (2003) proposed a model of strategic evolution as a sequence of intentional recombination of a company's core micro-strategy with new resources and organizational routines based on two comparative case studies of two Italian firms.

It is important to mention that all those researchers looked closely inside the organizations to gather comprehensive, systematic, and in-depth information, as proposed by

Patton (2000) and which is the purpose of the strategy as practice perspective (Whittington, 1996) such as strategists' linguistic skills and forms of knowledge for strategizing (Samra-Fredericks, 2003) and their routines and conversations (Rouleau, 2005), for example. More specifically, Rouleau (2005) has adopted the case study as a method to contribute to the deep understanding of the sensemaking and sensegiving by which the strategists, in the case the middle managers, interpret and sell strategic change.

The data were collected mostly through semi-participant observations, semi-structured interviews and document analyses (Yin, 1989). Transcripts of existing interviews, catalogues, news clippings, and annual reports have also been used and triangulated (Yin, 1989).

Individual Behavior

In order to understand the strategizing behavior of the top management team of three universities from the United Kingdom, Jarzabkowski (2008) conducted a seven-year longitudinal qualitative case study as suggested by Hartley (1994), when he stated that exploring new processes and/or behaviors that are not well understood is one of the main term and condition to use the case study as the research method.

To reach the objective, Jarzabkowski (2008), like the other authors, collected data through interviews, documentary sources and nonparticipant observation of strategy meetings, pre- and post-meeting observations, shadowing, and other on-site observational data (Yin, 1989), which enabled her to explore strategizing behaviors and processes as they unfolded.

Jarzabkowski (2008) has addressed how the managers shape either the structural context or the interpretations of organization members, that is, what the managers do in the strategy process. As reported by Jarzabkowski et al. (2007) the action, part of the strategy, must be studied if one wants to understand how the strategy is constructed. It can be done by analyzing the process of doing the strategy that researchers can comprehend how strategists behave. The practices are the routines of behavior, including traditions, norms, and procedures, as stated by Whittington (2006).

In the same line as Jarzabkowski (2008), Sillince and Muller (2007) have explained the different positions taken by middle and top management team about a strategy failure and concentrated their study in the reframing of accounts of responsibility for strategy. Hoon (2007), in her turn, conducted a single longitudinal qualitative in-depth case study in a German university to examine the role of committees as a strategic practice during the implementation of personnel development in a public administration, Laine and Vaara (2007) examined the discourses and practices of strategic development in an engineering and consulting group.

To study the phenomena from the strategy as practice perspective, data collection has been conducted mainly through interviews, documents analysis and direct/participant in-loco observations, as suggested by Yin (1989).

Actions and Interactions

The studies with the strategy as practice perspective have also conducted case studies to analyze the interactions of the members that do the strategies in the organizations (Aaboen et al., 2013; Balogun & Johnson, 2005; Jarzabkowski, 2003; Jarzabkowski et al., 2015; Werle & Seidl, 2015). In general, the studies focused on the practical activities in which the organizational members interact as well as on the strategic practices through which interaction are conducted, which are premises of the strategy as practice literature (Jarzabkowski, 2003). According to Yin (1989), the case study is a method that contributes to the understanding of social and organizational phenomena and so it does the strategy as practice perspective (Whittington, 2007).

In this sense, in opposition to the mainstream of strategy studies, the strategy as practice perspective is concerned with the actions and interactions of the individuals practicing the strategy within organizations (Jarzabkowski et al., 2007; Whittington, 1996). This perspective examines the interaction of the actors in everyday practices with the social and physical features of context (Jarzabkowski, 2003). According to Balogun and Johnson (2005), they chose the case study to approach the phenomena once they wanted to capture the contextual richness and complexity of the case.

The data, as suggested by Yin (1989), were collected by multiple sources like participant observation of meetings, written participants of the research notes, as well as photographs, documents, and interviews.

How Processes Occur

Most of the papers examined in this narrative review adopted the strategy as practice perspective and the case study as the method to understand how things occur inside the organizations where they showed how strategy is constructed and how these practices impact the organization's daily life (Jarzabkowski et al., 2007). According to Yin (1989), the case study is generally the method used to understand "how" and "why" a contemporary phenomenon occurs in some real-life context.

Paroutis, Franco, and Papadopoulos (2015) investigated how the top management team in a medium sized enterprise creates a strategy tool during a workshop. By using the case study as a qualitative method, they could see the interaction of the members, the in-depth discussions and all the activities involved those kinds of events. We share the thought of Morse and McEvoy (2014) and affirm that it would be very difficult to capture such phenomena without a qualitative case study as the research method.

In the same line, Maitlis and Lawrence (2003) studied the failure in the organizational strategizing process of members of a British symphony orchestra to construct an artistic strategy for their organization. The focus of the study was to understand how decisions were made and to identify and explain the patterns of involvement for a variety of different stakeholder groups. Régner (2003) has also examined how managers create and develop strategy in practice by using a dual longitudinal case study methodology including a single in-depth study combined with a multiple retrospective study four multinational companies.

Other authors conducted case studies to understand how organizational strategies met, or failed to meet with everyday work (Mantere, 2005); how managers respond to the same corporate change initiatives (Stensaker & Falkenberg, 2007); how strategy meetings are involved in either stabilizing existing strategic orientations (Jarzabkowski & Seild, 2008); how strategic planning is able to deliver strategic integration within organizations (Jarzabkowski & Balogun, 2009) and how boards "do" strategy (Hendry et al., 2010; Paroutis & Pettigrew, 2007).

Additionally, Jarzabkowski et al. (2013) studied the practice of underwriting managers in reinsurance companies and identified the material artifacts that the managers used to appraise reinsurance deals to identify their practices and how the artifacts influence on that.

Tidström and Rajala (2016) focused on coopetition praxis and practices and how these are interrelated on the micro, meso and macro levels. In the same year, Darbi and Knott (2016) used a single case study to explore how an informal business and its network partners do strategic networking. Not to mention, in 2017, Concannon and Nordberg (2017) revisited the work of directors, that is, how they engage in strategizing on the service side. Finally, Pfister, Jack, and Darwin (2017), with the new topic on strategizing - Open strategy - have studied how middle managers work with performance indicators to strategize.

It is relevant to mention that even though the authors have used the case study to analyze how processes occur it does not exclude the fact that the processes are always done by people from inside and outside the organization, that is, the practitioners, through their actions and interactions, and the processes are the outcomes derived from those activities. On this wise, we remind Jarzabkowski et al. (2016) and emphasize that practices cannot be seen in isolation, as the praxis and practitioners must be taken into consideration.

To analyze how process occur, authors collected data from in-depth interviews, participant observations, video and audio recording and extensive documentary analysis as Patton (2000), Yin (1989), Lavarda and Balbastre (2009) and Pérez-Aguilar (1999) proposed to guarantee the validity and reliability of the studies (Yin, 1989) and rigor (Daughtery, 2009; Gaikwad, 2017).

Discussion

It is relevant to notice that the papers analyzed in this narrative review constituted in-depth studies once they went inside the organization, approached the dynamic social processes; had close look at micro activities (routines); tried to comprehend the individual behavior of the members participants of the strategy making process; aimed to understand their interactions and how they construct the strategy in a micro perspective. To do that they used, as a method, the case study since they wanted to approach phenomena from the lenses of the strategy as a social practice.

Because the strategy as practice is interested in situated, concrete activity (Whittington, 2003), the strategizing perspective needs to trace the detailed micro activities which constitute the day-to-day actions of individuals that participate in the strategy making process. The way of doing that is through face-to-face contact, interviews, and observation “in locus” or inside the case (Yin, 1993) which are sources of data collection pointed by Yin (1993), Stake (2000), Hartley (1994), and Patton (2000). This was well noticed in all the papers that composed the present study.

We also observed that all the papers presented rigor in the case studies used (Daughtery, 2009; Gaikwad, 2017) and triangulated the data collected from the sources mentioned above. To Yin (1989), the triangulation of data becomes a rational foundation, so any finding or conclusion in a case study is going to be more convincing and accurate. Besides, the triangulation is valid once is makes use of multiple perceptions to clarify the meaning of the researched phenomena (Stake, 2000).

In this way, we could confirm, through this analysis, that the case study is one of most adequate methods to understand such practices as they contribute to have a better understanding the phenomena in its particularity (Stake, 2000) such as dynamic process (Yin, 1989). Furthermore, case study may be a suitable method to explore social processes as they occur in organizations (Hartley, 1994); it gathers comprehensive, systematic, and in-depth information from practitioners (Patton, 2000; Splitter et al., 2021); it contributes to understanding the individual, organizational, social, and political phenomena (Yin, 1989); it explores new processes and/or behaviors that are not well understood (Hartley, 1994) and, lastly, it is appropriate when researchers have questions such as “how” and “why” (Yin, 1989).

Finally, we understand that the detailed case studies analyzed provided insights into how practices related to strategy are conducted, how promoted actions and interactions among its practitioners and how decision-making are being shaped inside organizations.

Final Remarks

The goal of this study was to comprehend how case studies are used to analyze strategy as practice perspective phenomena inside organizations. To achieve the objective, we revisited papers published in high index management journals that have presented the case study as method to analyze the phenomenon from the strategy as practice perspective, conducting a theoretical narrative review associated with a systematic analysis of the literature seeking to discuss the development of cases.

We understand that the case study was a suitable method to perform an in-depth analysis of phenomena inside organizations when it concerns the strategy as practice perspective since it contributes to the analysis of the case in its singularity as it does the studies of strategy as a social practice. Furthermore, the case study as a qualitative method shedding light on the actions and interactions, individual behaviors, the routines, or specific strategic episodes as well as the decision-making processes inside organizations (Patton, 2000; Stake, 2000; Yin 1989, 1993).

Whittington (1996) observed that the strategy as practice perspective would have some implications for practitioners and research, being it the most radical challenge for the academic community where it would be necessary to go through the routines of practice which cannot be done from a distance and do more than manipulate large statistical databases.

The contribution of this theoretical study is that it highlights the importance of more qualitative methods, with focus on case study, to study reality inside organizations (Iasbech & Lavarda, 2018), in addition to those addressed by Golsorkhi et al. (2015). Also, this study contributes to the qualitative research literature to reveal that qualitative methods, such as case study, have the power to study reality in the field of research, because it studies the phenomenon at an in-depth level, such as dynamic social process, micro activities (routines), individual behavior, interactions, and processes. Thus, we point out the relevance of qualitative research applying the case study method to investigate phenomena from the strategy as practice perspective. Besides, in accordance with Morse and McEvoy (2014), we understand that researchers can consider using qualitative case study methodology when it can contribute to the comprehension of specific situations while bringing a deeper answer to research questions.

As limitation, we point out the scope of the paper that is limited to a theoretical investigation (Whetten, 1989) investigation and does not intend on being tested empirically this time. It means we did not conduct a case study in practice, we only analyzed how others have been conducted. Besides, it is important to highlight that the references selected for this analysis carry a conceptual bias related to the profile of the researchers.

Thus, we believe that future studies may be conducted focusing on empirical research using the case study combined with other methods such as grounded theory, ethnomethodology, or ethnographic studies. Furthermore, we noticed that since 2003, according to these articles studied here, that there has been an increasing number of studies applying the case study as a method to understand the organizations' strategies in practice and their micro practices in different contexts, thus, to get more evidence, we point it out as a future avenue to be explored.

By going deep inside the organization, conducting powerful studies involving people in action in their environment, in their day-to-day activities and practices, we can better understand and comprehend phenomena that involve practices and practitioners and look for still unanswered questions: where are those practices leading us as a community of practitioners?

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