

# THE ACTORS AND THEIR ROLES IN THE MEANING MAKING PROCESS OF AN ENERGY TARGET

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How are new long-term energy targets for buildings managed in public construction client organisations? This paper presents an empirical account of the actors, their roles and contributions to the meaning making process regarding an energy target for public buildings and the development of an energy strategy. With this account, we wish to initiate a discussion on what actors and practices that are needed in construction sector when contextualising and implementing long-term energy targets in practice. The paper is based on a longitudinal study in a public construction client organisation in Sweden, where for example in-depth interviews and observations of meetings has been used for data gathering.

Keywords: actors, energy target, meaning making process, strategy development process, public construction client.

## INTRODUCTION

Currently, a new EU directive on energy use in buildings (e.g. European Commission, 2010) needs to be managed in e.g. construction client organizations and new strategies formed in order to adapt current practices to the new demands. In order to understand how such political directives influence organisational practices, we pay attention here to the actors involved in the meaning making and strategy development process regarding energy targets.

The actors involved in the meaning making and strategy development processes can represent a formal role, a certain competence and/or personal characteristics. Earlier practice oriented strategy research have focused on top and middle managers (Vaara and Whittington, 2012). More, external actors, such as consultants, media gurus and policy-makers, have also been identified as having an influence on organisational strategy (e.g. Jarzabkowski and Spee, 2009). We refer to the actors involved in strategy development as: “strategy practitioners [...] who shape, drive and execute

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strategies drawing on practices such as methods, processes and models for strategic analysis formulation and implementation” (Nordqvist and Melin, 2008: 328).

Drawing on calls regarding who the actors are and what they actually do when a new strategy is developed (e.g. Vaara and Whittington, 2012, Regnér, 2003), we focus here on the roles taken/played by the actors in a strategy task force (STF) during a meaning making process. The STF was a temporary group of internal (e.g. energy expert) and external (e.g. consultant) actors, who contributed to an investigation of organisational implications of a new energy target for buildings. More, their task was to develop a strategy for meeting the energy target. The team resembled a ‘strategy task force’, STF, as described by Rosén (2011). The aim of this paper is to contribute with an account of the actors in the STF, who they were, why they were involved and how they contributed to the meaning making in the strategy development process. By studying the actors and their roles, our purpose is to initiate a discussion on what actors and practices that are need in construction sector when contextualising and implementing long-term energy targets in practice.

### **Research regarding strategic actors**

An actor may become a ‘strategic actor’ due to her/his formal position. Examples of positions can for example be a manager but also more temporarily roles. For example, Denis *et al.* (2009) identified the ‘sensemaker-in-chief’ as someone tasked to “shaping strategic change, at least conceptually” by influencing how meaning is made about organisational change. Further, Balogun *et al.* (2005) presented the ‘boundary-shaker’, an individual tasked to “implement change across existing internal organisational boundaries, in ways that simultaneously alter those boundaries” (p. 261-262).

More, an actor may also influence on strategic issues due to her/his personal characteristics and competences (Ludvig *et al.* 2012, Rouleau and Balogun, 2011). Mantere (2005) identified ‘strategic planning champions’ as persons who “try to influence strategic issues larger than their own immediate operational responsibilities” (Mantere, 2005: 157). Nordqvist and Melin (2008) noticed that a ‘strategic champion’ needs skills above being a strategic thinker. The champion also needs to be a social craftsperson, sensitive to and able to balance tensions between various actors, and an artful interpreter of practice, i.e. someone who can draw on and adjust to the local practices and norms (Nordqvist and Melin, 2008). However, what the actors in these roles actually do and how this ‘doing’ influence the strategy in practice needs a closer examination (Balogun *et al.* 2005). In particular, actors who attempt to influence others in public organisations face particular challenges, due to the multiple and sometimes conflicting agendas and diffuse power bases among different actors (Hartley *et al.* 1997).

Empirical research regarding development processes of new strategies, as well as the actual roles and practices used by involved actors, in particular those actors who engage in strategic activities aimed at changing the organisational boundaries (cf. Balogun *et al.* 2005) is still scarce. There are examples of studies focusing on how organisational strategies are developed in practice (see for example Rosén, 2011, Regnér, 2003) and how strategic activities over time relate to change in construction organizations (see for example Löwstedt *et al.* 2011). Yet we know relatively little about what actually happen, how and who is involved when a new strategy emerges (Vaara and Whittington, 2012, Regnér, 2003), especially in public construction organisations.

## **METHOD**

The paper is based on a research study, which takes a micro perspective on the meaning making process regarding energy use in buildings in a Swedish public construction client organisation. The process where the officials made sense of and developed a new energy strategy to meet the target was followed for nine months, between December 2010 and August 2011. The explorative, longitudinal study posed an opportunity to, in real time, study how meaning was made over time and how it was contextualized. “Close engagement and cooperation with the practicing managers” is necessary for this type of process study where details about activities are sought for (Rosén, 2011). The empirical data set consists of narrative accounts (25 in-depth interviews), observations (13 project meetings) and documentation from the studied process. Taken together, our data set generates in-depth knowledge about how the studied actors talked and acted during the strategy development process, i.e. what they did in order to make sense of, form and formulate the new strategy.

The development of a rich chronological description, or narrative, constituted an initial step in the analysis of the data set (Langley, 1999). In the next step of the analysis, we set out to identify the actors that were, directly or indirectly, involved in or had influence on the meaning making of the energy target and/or the strategy development process. More, we searched for patterns regarding how these actors acted, interacted and how they influenced/were influenced by the process. For this paper, field observations from the project meetings were analysed in-depth, in terms what roles the key actors took/were given and how they contributed to the sensemaking/strategy development process. The analysis of the project meetings (transcripts and recordings) was an iterative process between data and theory, as we wanted to let the data ‘speak’. In this paper, we focus on four key actors in the STF during the strategy development process and gives examples of the actions/interaction.

## **THE STRATEGY DEVELOPMENT PROCESS**

The studied organisation, a Swedish public construction client organisation (here called Alpha), is part of a public county organisation (here called the Gamma group), which is governed by democratically elected politicians. The county organisation provides public services within sectors such as health, culture, environment and transportation etc. Alpha was formed in 1999 and owns, rents and manages public facilities. More than 80% of Alpha’s energy use is related to operation and maintenance of nine large emergency hospitals.

In 2010, the owners of the Gamma group, i.e. the politicians, decided to become fore-runners regarding energy efficiency by officially setting the target that “Gamma will reduce energy use in buildings by half until 2030”. The decision was inspired by activities at European and national level. That is, the European Commission had launched a revised directive on energy use in buildings; all member states should reduce energy use by 20% from year 1995 to 2020, and from 2020 all new buildings should use almost no energy (European Commission, 2010). Sweden adopted an additional national target aiming at reducing the energy use by half before year 2050 and the public sector was envisaged to lead the way by setting even more ambitious targets.

In the beginning of 2010, the owners of the Gamma group informally contacted Alpha’s senior energy expert to get assistance in the formulation of Gamma’s new energy target. This expert had successfully executed several energy reduction projects

and initiatives, and was seen as ‘Mr. Energy’ by his colleagues. As a result of these informal initial discussions with the owners, Mr. Energy initiated an investigation project regarding the consequences of the new energy target within Alpha. With mandate and blessings from Alpha’s general manager (top management) he also formulated the task assignment, set the budget for and conducted the project. Already from the beginning, Mr. Energy had a clear vision of what he wanted to achieve regarding energy issues in the Gamma group. He also knew from start what he wanted the investigation project to result in; namely a renewed focus on energy efficiency in buildings. To his assistance, he formed a team, hereafter called the ‘Strategy Task Force’ (STF) (cf. Rosén, 2011). The STF had regular meetings, best characterized as “free discussions” (cf. Jarzabkowski and Seidl, 2008), from November 2010 to August 2011. Below we present the four actors, their different roles (taken or given), interests and contributions to the meaning making of the energy target and the strategy development.

### **The Key Actors**

In total, seven actors who represented various but interrelated expertise areas participated in the STF work. However, all seven did not participate at the same time but joined the STF when their particular competencies were needed. Three of them (an energy coordinator at Alpha who participated during the first two months, and two junior consultants who assisted Mr. Consultant at different times) had only minor roles during the strategy development process. Here, we focus on the four STF actors (briefly described in Table 1) that had the greatest influence on process.

*Table 1: The actors in the strategy task force*

	Background	Period involved in the STF
Mr. Energy	Senior engineer, more than 30 years of working experience of energy efficiency issues. Alpha’s internal energy expert. At Alpha since it was formed.	Involved from pre to post process, Jan 2010 and onwards.
Mr. Consultant	Senior engineer, 25 years of working experience or energy efficiency issues. Regularly engaged by the Gamma group.	Involved from process start to the end, Sept 2010 and onwards.
Mr. Economy	Real estate economist, 10 years of working experience, but only one year at Alpha.	Involved from Nov 2010 to March 2011.
Mr. Synergy	Senior engineer, 30 years of working experience of e.g. technical maintenance of buildings. At Alpha since it was formed.	Involved from Feb 2011 to August 2011.

#### *Mr. Energy*

The most central character in this story is ‘Mr. Energy’. As described above, he was given the opportunity to influence the politicians when they set the energy target. This resulted in a visionary formulation of the new energy target that included the whole Gamma Group. This happened months before the energy target was officially launched in June 2010. Thus, Mr. Energy laid the foundation for an increased organisational focus on energy issues, where all stakeholders would share the responsibility to meet the new energy target.

Already in the initial discussions with the owners Mr Energy realized that extensive measures were needed in order for Gamma to meet the target. Accordingly, he initiated the investigation project and orchestrated the strategy development process,

with mandate and trust from top management. More, he identified and attracted personnel resources that he needed in the STF at certain times. More, he set the agenda for and acted as the convener at the STF meetings. Although letting the others run the discussions during the meetings, he orchestrated the investigation project to ensure that the STF kept focus on the goal, i.e. the development and implementation of the new energy strategy, and how to reach it. For example, when the meeting discussions entered into too long negotiations on technical details, Mr. Energy interrupted and asked “What do we want to show? What kind of decision do we want [from top management]?”

As the leader of the investigation project, he regularly briefed top management, mostly on informal basis such as ‘water cooler’ conversations between meetings but he also initiated formal meetings and presentations. He took on the role as top management’s voice in the STF meetings: “I don’t know exactly how [the general manager] thinks, but as I understood it he needs a clearer statement [from us] to go the Real Estate Committee”.

Throughout the process, Mr. Energy planned when and what to inform others about. He used his personal networks, inside and outside Alpha, to spread the message about the energy target. He scheduled/arranged the meetings with and presentations for the stakeholders such as Alpha internal professional networks, other energy related development projects within Gamma and the Gamma owners. More, he set up an external reference group for the STF, to validate their work process and results. Thus, he put a lot of effort in how, what and when to communicate with different stakeholder groups in order to create commitment and action for the new energy strategy. In the STF team, he was with no doubt the ‘strategist’.

According to Mr. Energy, meeting the new target would require reorganisation of work and decision-making processes, at Alpha as well as within the Gamma group. He thought that the current organizational structure, with autonomous sub-organizations, at times blocked Alpha’s efficiency and he saw an opportunity to use the energy strategy as lever to loosen what he referred to as the ‘silo mentalities’. In parallel to the work in the investigation project, Mr. Energy planned for and strategized on the next phase, i.e. the implementation of the new energy strategy in practice. For example, with strong mandate from top management he prepared for an ‘energy committee’ to implement the new energy strategy. In order for the committee to work and manage the energy issue across the organisational structures of today, Mr. Energy planned that it would not necessary follow the current organisational structure, but ‘shake the organisational boundaries’ (i.e. the composition did not attempt to have representatives from all sub-organisations, but competent driving-spirits no matter organisational belonging). However, due to for example diffuse power and diverging objectives among the sub-organisations and top management, the energy committee was not in place as soon and smoothly as Mr. Energy wished, and therefore the implementation of the strategy was delayed.

#### *Mr. Consultant*

The first to be invited to the STF by Mr. Energy was an external energy consultant, ‘Mr. Consultant’. He and Mr. Energy shared positive experiences from working together in an energy related project a few years earlier. Mr. Consultant was also involved in several of Gamma’s highly strategic investment projects in new-building and redevelopment of health care buildings, where he successfully strived for and reached increased energy efficiency at low cost in buildings.

Together, Mr. Energy and Mr. Consultant formed a creative and committed core duo. Supported by junior colleagues, Mr. Consultant set up and modelled scenario analyses, he wrote reports and prepared PowerPoint presentations. During the STF meetings, he took the leading role in discussions on technical issues, since he needed for example data about the current buildings, building area now and in the future, investment plans etc in order to develop the scenario model. Often, he draw illustrations and diagrams on a blackboard in order to illustrate for the others what he meant, i.e. he used the interactive drawings as a sensemaking device. Some of these illustrations were later digitalised and used in presentations and reports. Thus, Mr. Consultant was the 'doer' in the team, who 'materialised' and visualised the STF work into tangible scenarios and presentations.

The scenario model analyses, developed by Mr. Consultant, indicated that the additional cost for the Gamma group to meet the energy target would be lower than the Mr. Energy and Mr. Consultant had expected. However, the funding for the additional cost had to be solved before the STF could continue with informing their Alpha colleagues about the new energy strategy; "It is very difficult to sell in this political argument [regarding the strategy]. First we need to solve the funding." Hence, Mr. Consultant and Mr. Energy realized that they had an 'attractive message' (i.e. that meeting the target would not cost much), but a pedagogical challenge regarding how to present the results so that top management legitimated further action regarding the new energy strategy, i.e. facilitated arrangement of funding of the additional costs. Improving the 'pedagogic' in presentations (e.g. briefings for owners and top management) and dialogues with stakeholders was considered a continuous and important task by the STF and much discussed in meetings.

As a mean to make sense of various problems/issues that appeared during the investigation project, Mr. Consultant often referred to discussions and details from Gamma's parallel strategic investment projects in which he was also working. Thus, he contributed with ideas and experiences from ongoing projects, but also brought back inspiration to the projects from the STF discussions. The result of this cross-fertilization was that as the investigation project progressed, the tentative energy strategy was discussed and, where possible, implemented in ongoing investment projects. These implementation activities were in turn used by Mr. Energy as 'good examples' in the communication about the energy target in different contexts.

#### *Mr. Economy*

Mr. Energy and Mr. Consultant soon realized that they together lacked very important knowledge; they needed someone who knew the 'language of economy' in order to succeed with the strategy and its implementation. Consequently, Mr. Economy was engaged in the STF by Mr. Energy. Due to his confidence-inspiring manner, his humble and generous attitude, Mr. Economy had developed a large network within the Gamma Group. Even though neither Mr. Energy nor Mr. Consultant had worked with him before, their confidence in Mr. Economy was huge.

According to Mr. Energy and Mr. Consultant, Mr. Economy opened their eyes to what they referred as the 'profitability dilemma', i.e. that the common focus on and request for profitability of investments did not apply to this politically set target in public organisations; "What are we actually talking about? It's not about profitability, it's about investment costs. The decision [to reduce energy] is made [by the politicians], you have no choice but to implement it. But at what cost?" More, Mr. Consultant expressed his and Mr. Energy's initial efforts as; "Well, we were very much focusing

on profitability [...], but then [Mr. Economy] told us not to worry about that". This input from Mr. Economy helped the others to refocus from 'profitability of investments' to 'costs for meeting the target' during the end of 2010. When Mr. Energy and Mr. Consultant struggled with deciding on what to present for Alpha top management and at what level of detail (February 2010), Mr. Economy proposed to present an overview of what they actually knew at the time, without digging into unsure details. Technical or financial details were not relevant to present, Mr. Economy reckoned, before the strategy was further outlined. This illustrates how Mr. Economy managed to identify and make sense of the needs of both the STF and the top management and find bridging solutions.

Thus, Mr. Economy helped the STF to focus on how to 'package and present' the energy strategy, rather than on the profitability of technical solutions. More, he used his personal network to informally inform and/or anchor different aspects with for example the general manager and/or the financial manager; "I informed and anchored this with [the general manager] today, and I have also discussed this with [the financial manager]".

However, in the end of March 2010, Mr. Economy had to leave the STF due to illness. The gap he left in the STF was significant. While the technical part of the strategizing progressed, the financial part regarding meeting the energy target slowed down considerably when Mr. Economy was on sick leave, as illustrated by Mr. Energy; "The problem now is that no one from the [Economy department] is involved and committed. If [Mr. Economy] had still been in the STF, we would have been much further ahead. [...] We thought that the [general manager] would have driven this issue, but he did not".

The others in the STF referred to Mr. Economy's contribution and importance to the investigation project frequently, as expressed by Mr. Energy, when he in April realised that HOW much influence Mr. Economy had had on the progress of the STF; "It was these kinds of discussions that we had a lot with [Mr. Economy] before he got sick, and now we have lost valuable months since we did not continue the discussions." Thus, Mr. Economy played an important role in the STF that was not fill/replaced when he left.

#### *Mr. Synergy*

Mr. Synergy was invited to his first STF meeting in early winter 2011 when, according to Mr. Energy, the identified main barrier for a successful implementation was taken care of, i.e. the funding issue. Thus, the strategy development project went into a new phase where focus was on facilitating Alpha's and Gamma's organisational meaning making about the energy target. Mr. Energy started to inform colleagues and customers about the new energy target and the energy strategy, since he saw early information spreading as a key to gain acceptance and create commitment among stakeholders for the energy issue. Hence Mr. Synergy was invited to the STF at a time when he was assumed to contribute with his broad perspective and interest, open minded personality and reflective manner. His own explanation to why he was invited by Mr. Energy was "because I am interested in finding synergy effects from this investigation project".

Mr. Energy and Mr. Synergy had been colleagues for the last decade, thus developing a professional relationship. Further, Mr. Synergy also knew Mr. Consultant very well, and he describes how they had developed a close client-consultant relation: "Well, we do not socialize in private, but we often use each other as discussion partners and try

to think strategically”. They acted as sounding boards and ‘confidants’ for each other, i.e. they were each others ‘counsellors’ regarding professional issues. Due to his relations with both Mr. Energy and Mr. Consultant he could easily ‘slip into’ the STF and become ‘one in the team’.

Mr. Synergy became the ‘reflective one’ in the STF, questioning already made assumptions and estimations. His questions were not critical, but constructive and made out of a genuine interest in understanding the investigation process and the strategy. However, his questions forced the STF to reflect on their work and the process. More importantly, Mr. Synergy brought the customer perspective into the discussions when he questioned the scope of the investigation project in terms of what and whose costs to include in the scenario modelling and presentations. If the STF could show the customers potential synergy effects, for example that the energy efficiency measures could contribute to the efficiency in operation of care, that would provide the customers with incentives to commit to the energy target.

Thus, Mr. Synergy was brought into the strategy development process when his characteristics and competences were valuable for the STF and he managed to broaden their sometimes too narrowed focus, to a more open and customer oriented approach.

## **ANALYSES AND DISCUSSION**

Our purpose with this paper is to initiate a discussion regarding actors and practices in construction organisations challenged by new long-term energy targets. In order to do so, we present the actors in a Strategy task force during a meaning making and strategy development process of an energy target, with focus on the actors’ roles and contributions.

A general view has been that strategy is something that only managers are involved in and that the centre of strategic activities is found among corporate management and board of directors (cf. Regnér, 2003). Here, we have an example of a periphery expert (according to Regnérs definition) who initiated and manoeuvred a strategy the meaning making and the development of a new energy strategy. The paper shows how this one actor, Mr. Energy, took the role of ‘strategic champion’ (Nordqvist and Melin, 2008, Mantere, 2005) at Alpha and became a ‘sensemaker-in-chief’ (cf. Denis *et al.* 2009). He had a position as appreciated energy expert due to his professional experiences and characteristics. He was enabled in the role as strategic champion by top management, as they gave him mandate to act upon the new energy target. Mr. Energy was a driving spirit, who possessed discursive competences (Ludvig *et al.* 2012), such as being a skilled networker who knew who to influence, how and when. Yet, he needed support.

In order to succeed with the development and implementation of an energy strategy, he foresaw a need to shake organizational boundaries (cf. Balogun *et al.* 2005), i.e. a need to influence and create action among actors outside his formal area of responsibility and his core competence (the energy issues). Therefore he initiated and orchestrated an investigation, conducted by the STF, in order to develop a new strategy. Here, he had the mandate to recruit competences/ personnel resources, i.e. the co-strategist, he needed. Mr. Energy chose his co-strategists among colleagues that he knew, respected and trusted. He identified what competencies and perspectives he needed to complement his owns, in particular phases of the strategy development process. Initially, a ‘doer’ was introduced. Mr. Consultant was a driving spirit, as Mr.

Energy, and entrepreneur with advanced technical competence regarding energy efficiency in buildings. He was also engaged in several ongoing investment projects, thus he contributed to the STF with insights in current building practices in Alpha. Soon after a colleague who knew the 'language of economy' became engaged. Mr. Economy complemented the former two in terms of competence (he was a real estate economist and therefore knew how to communicate about strategic issues on the 'language of economy' as stated by Mr. Energy) and personal networks (he was in regular contact with for example financial managers). The fourth actor in the STF was invited at a time when Mr. Energy wished to broaden the perspective in the STF discussions, from technical and financial matters to creation of commitment and action among colleagues and customers, through communication. By then, Mr. Synergy's the broad perspective and curiosity was needed in order to widen the STF discussions. Thus, each of these actors had a particular role and brought specific competences to the STF.

A consequence of how Mr. Energy composed the STF was that an efficient team was formed and the meeting dialogue was characterized as free, creative and humoristic. However, the discussions were seldom questioned in detail as no one in the team took on the role as 'criticizer'. To some extent it seems as, the roles for each actor in the team were already defined by Mr. Energy when they actors entered the team, as he knew them in person from earlier. It can be discussed how the meaning making process would have been different if other actors would have participated. As seen in the empirical account, Mr. Energy chose his co-strategist carefully, including the exclusion of those who should not be allowed to contribute to the meaning making, or in worst case even could jeopardise his vision of increased energy focus in Alpha. But what actors were excluded and why? From this account, we still know little about that and to find an answer we need to search among actors outside the STF, which is certainly interesting but outside the scope of this paper.

Hence, few actors actually participated in the actual development of the energy strategy. Mr. Energy was more concerned with how to 'get everyone on board', rather than on broad participation in the actual meaning making process. The consent and support for the strategy was needed among actors outside the construction organisation, because the energy reduction measures concerned e.g. the customers and financial department. The dialogues Mr. Energy held with other stakeholders, like project managers and financial managers, were mainly used to communicate about the target and the strategy, as a way to create sense of the situation (c.f. Gioia and Chittipeddi, 1991, Maitlis and Lawrence, 2007) and thereby legitimize the tentative strategy.

Above this initial account, we see several aspects regarding actors and practice in need of more research attention. This paper has consciously not focused on actors and actor groups beyond the STF that were influenced by or had influence on the studied meaning making process. In particular, the relation and interaction between Mr. Energy and the top management team has not been examined here, but such analysis could contribute to the research calls regarding power, politics and agency in the context of strategy development and sensemaking (e.g. Vaara and Whittington, 2012, Maitlis and Lawrence, 2007, Weick *et al.* 2005). More, the actors' roles and contributions to the STF are likely to change over time, but the time perspective needs further examination.

To conclude, we have seen how the actors in the STF, namely a strategic champion accompanied with a doer/technical expert, one that knew the language of economy and a curious colleague with broader perspective than only energy, systematically and tactically contributed to the meaning making process of the energy target. This account is an initial step in our examination of who the actors are and what they actually do, when public construction client organisations are challenged by long-term energy targets.

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