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Managing Organizational Legitimacy through Modes of Open Strategizing

ABSTRACT

Extant literature associates the central purpose of open strategizing with organizations seeking to manage legitimacy (e.g. Chesbrough & Appleyard, 2007; Whittington, Cailluet & Yakis-Douglas, 2011; Dobusch, Dobusch & Muller-Seitz, 2017). To date, legitimacy has been highlighted as a potential 'effect' (Gegenhuber & Dobusch, 2017) or 'outcome' (Luedicke, Husemann, Furnari & Ladstaetter, 2017) of strategic openness. Absent has been research attempting to understand open strategy as a process of legitimation (Uberbacher, 2014), and there remains a need to elevate the potential of open strategy for managing legitimacy further. To address this gap, the research presented here adopts a longitudinal, single case analysis to explore a professional association who developed a new four-year strategic plan using an open strategy approach. The findings indicate how open strategy dynamics represent the case organization switching between distinct approaches to legitimation, to manage competing stakeholder demands. The research offers an important contribution by accentuating the principal relevance of organizational legitimacy in open strategizing. This brings open strategy into close alignment with organizational legitimacy literature and its theoretical conceptions (Lawrence, Suddaby & Leca, 2011; Suddaby, Seidl & Le, 2013; Smets, Aristidou & Whittington, 2017), which is imperative for understanding the potential importance of open strategy as a means of managing legitimacy.

Keywords- strategy, open strategy; legitimation; organizational legitimacy; strategy as practice; pluralistic contexts; practice-driven institutionalism.

INTRODUCTION

This research explores how modes of open strategizing can be used to manage organizational legitimacy in a pluralistic context. Strategy has typically been a secretive and exclusive role (Newstead & Lanzerotti, 2010). However, there exist numerous streams which have explored heightened participation in strategy work (e.g. Floyd & Wooldridge, 1992; Collier, Fishwick & Floyd, 2004; Mantere, 2008). Open phenomena in strategy are also being explored in relation to *how* organizations can facilitate involvement of a wider range of stakeholders in generating strategic content (Chesbrough & Appleyard, 2007), and in practicing strategy (Whittington, Cailluet & Yakis-Douglas, 2011). Literature has studied notions of inclusion and transparency to understand practices and processes associated with changes in the way organizations are *doing* strategy. This stream of 'open strategy' (OS) research posits that inclusion of a wider range of actors, and increased transparency of actions, can bring benefit to organizations. Both technology-driven and 'analogue' strategizing practices (Baptista, Wilson, Galliers & Bynghall, 2017) can be used in cycles to ideate (Tavakoli, Schlagwein & Schoder, 2017), and communicate about strategy (Gegenhuber & Dobusch, 2017).

A central purpose for opening strategy is that organizations can gather critical insights and knowledge from key stakeholders, and understand their expectations, apprehensions and demands in a constructive way (Whittington, Cailluet & Yakis-Douglas, 2011; Amrollahi & Rowlands, 2017; Tavakoli, Schlagwein & Schoder, 2017). Beyond cycles of ideation, it has been recognized that notable outcomes of OS exist; both tangible (e.g. new formal strategic plans) and intangible (e.g. increased motivation of employees, increased trust in top management). This has led to studies alluding to organizations gaining increased legitimacy as a result of OS (Dobusch, Dobusch & Muller-Seitz, 2017), particularly through ensuring that their actions are desirable in the opinion of key stakeholders (Suchman, 1995). However, only a small number of studies have explicitly linked OS and legitimacy, and these do not go

beyond asserting legitimacy as a potential 'effect' (Gegenhuber & Dobusch, 2017) or 'outcome' (Luedicke, Husemann, Furnari & Ladstaetter, 2017). In this paper, we argue that absent has been research attempting to specifically understand OS as a process of legitimation (Uberbacher, 2014), and there remains a need to unpack and elevate the significant potential of OS approaches for managing legitimacy further. To address this gap, this research presents a longitudinal single case analysis of an organization undertaking the development of a new four-year strategic plan using an OS approach. We pose the following research question: *'How does an open strategy approach represent a process of legitimation for managing the competing demands of organizational stakeholders?'*.

A UK-based professional body is the basis for the empirical work in this paper. It is acknowledged that interrogating the intricacies of strategizing in pluralistic contexts, and the inherent competing demands of stakeholders, is a useful means of expanding the contextual base of practice-based strategy work (Jarzabkowski & Fenton, 2006). In the organizational legitimacy literature, there is much discourse on how legitimacy is managed and gained through specific processes and strategies, and increasingly this focus has been adopted to recognize how organizations might manage legitimacy demands in contexts defined by plurality, amidst diffuse power and divergent objectives (Denis, Langley & Rouleau, 2007). This means our empirical work is positioned at the nexus of interest in strategizing and managing legitimacy in pluralistic contexts, and does so by uncovering the potential significance of OS in relation to these areas.

Numerous data collection methods were used, including completion of 30 semi-structured interviews, participant observations, and collection of significant social media and documentation data. In designing our research, we considered calls for a practice-driven approach to exploring micro aspects of macro, institutional phenomena (Suddaby, Seidl & Le,

2013; Bitektine & Haack, 2015; Smets, Greenwood & Lounsbury, 2015; Smets, Aristidou & Whittington, 2017). More specifically, the work here conceptualizes how the case organization has adopted a plethora of open strategizing practices for legitimacy effects (Suddaby, Seidl & Le, 2013), providing a detailed account of how different modes of OS result in legitimation over time. This attends to the 'stuff' involved in managing legitimacy (Smets & Jarzabkowski, 2013; Smets, Aristidou & Whittington, 2017). The findings emphasize that identified modes of OS represent the case organization switching between distinct approaches to legitimation, as a means of managing the competing demands of organizational stakeholders. Through this, a greater perception of legitimation as a core purpose and result of OS is provided, and this research offers an important contribution by accentuating the relevance of organizational legitimacy and OS. This elevates legitimacy beyond being understood as an effect or outcome, and brings OS, as an organizational practice, into close alignment with the organizational legitimacy literature and its theoretical conceptions (Lawrence, Suddaby & Leca, 2011; Suddaby, Seidl & Le, 2013; Smets, Aristidou & Whittington, 2017). This is imperative for understanding OS as a means institutional work in the form of legitimation (Lawrence & Suddaby, 2006).

THEORETICAL FOUNDATIONS: OPEN STRATEGY AND LEGITIMATION IN PLURALISTIC CONTEXTS

Legitimacy and legitimation

Literature concerning organizational legitimacy is plentiful, and it has been studied in varying fields and epistemological traditions. An important consideration in organizational legitimacy has been who confers legitimacy and how (Deephouse, 1996). There can exist numerous subjects of legitimacy, including organizational forms and structures, governance mechanisms, categories, shareholders, and top management teams (Deephouse & Suchman, 2008). Sources of legitimacy, on the other hand, are the internal and external stakeholders

who observe organizations, and make certain evaluations relating to legitimacy (Deephouse, Bundy, Plenkett Tost & Suchman, 2017). This can be a conscious or subconscious action by evaluating organizations based on distinct criteria or standards (Ruef & Scott, 1998; Deephouse, Bundy, Plenkett Tost & Suchman, 2017). Whilst legitimacy can be positioned as part of an organization as conferred by stakeholders, it is not to be confused with legitimation, which is more specific in underlining the process by which organizations can acquire, maintain, and defend legitimacy (e.g. Suchman, 1995; Uberbacher, 2014). Research in this tradition has also been referred to as the 'legitimacy-as-process' view (Suddaby, Bitektine & Haack, 2017), and such processes are often bundled into the term "legitimacy management" (e.g. Oliver, 1991; Suchman, 1995: 572). Enshrouded in legitimation exist distinct legitimation strategies, which represent specific means of managing legitimacy. These relate to how legitimation is attempted or achieved through distinct tactics and practices (Oliver, 1991; Vaara, 2006). Literature has explored management of legitimacy in the form of legitimation strategies in some depth, presenting legitimation as a context-dependent process of social construction (Bitektine & Haack, 2015). Established literature indicates that organizations take steps to ensure continued legitimacy, particularly in strategy orientated work which has developed its own views on organizational agency and cultural embeddedness, and in turn led to focus being on organizational-level legitimation strategies (Suchman, 1995). By contrast, institutional theory has, to some degree, disregarded individual agency and focused scantly on exploring legitimation strategies in significant depth (e.g. Suchman, 1995; Pache & Santos, 2010). Historically, strategic and institutional traditions tend to "talk past one another" due to their divergent views on agency and embeddedness (Suchman, 1995: 572). Subsequently, frameworks are varied in their explaining of legitimacy as a process (Suddaby, Bitektine & Haack, 2017), and to manage legitimacy, managers may

need to adopt different processes, or formulate specific legitimation strategies, especially in the eyes of key stakeholders (Scherer, Palazzo & Seidl, 2013).

Strategizing and legitimation in pluralistic contexts

Pluralism increases the complexity of organizations (e.g. Ashforth & Gibbs, 1990; Suchman, 1995; Deephouse & Suchman, 2008). Whilst interest in pluralism in management and organization studies has increased, it has not been fully translated into existing theories of management explicitly (Jarzabkowski & Fenton, 2006; Denis, Langley & Rouleau, 2007). The strategy-making activities of organizations in pluralistic contexts have received scant attention, and represent an area of potential interest and relevance, and one prime for further exploration (Jarzabkowski & Fenton, 2006; Pache & Santos, 2010). In this sense, pluralism could have a greater effect on strategy, as it has on other fields.

The challenges of managing legitimacy in pluralistic contexts is also notable, though this has similarly received less attention in organizational legitimacy literature (Deephouse, Bundy, Plenkett Tost & Suchman, 2017). Whilst the legitimacy management literature has focused on specific legitimation strategies, such strategies are likely to be relevant when an organization does not so plainly function in a single, clearly defined field, such as those characterized as being pluralistic in nature (Kraatz & Block, 2008; Baumann-Pauly, Scherer & Palazzo, 2016). Whilst seminal works recognize pluralism broadly (e.g. Suchman, 1995), these points are relatively undeveloped and relate more to segregation strategies (e.g. Meyer & Rowan, 1977) than directly including pluralism considerations. Emerging works are, however, demonstrating promise by more unequivocally emphasizing specific legitimation strategies which detail how organizations might manage divergent stakeholder demands (e.g. Palazzo & Scherer, 2006; Scherer, Palazzo & Seidl, 2013). This includes legitimation strategies which

focus on how organizations adopt means to understand, balance and respond to pluralism in a number of ways (Kraatz and Block, 2008).

Prominent legitimation strategies amidst pluralism, and the emergence of hybridization

There have been calls for more exploration of agency and appreciation of micro aspects in institutional theories (Suddaby, Seidl & Le, 2013; Bitektine & Haack, 2015; Smets, Jarzabkowski, Burke & Spee, 2015; Smets, Aristidou & Whittington, 2017). Consistent with this, studies seeking to understand legitimation in pluralistic contexts have focused upon a grouping of three main, agency-intensive legitimation strategies: manipulation, adaptation, and argumentation. These are emphasized as the logical legitimation strategies that can be used to respond to "incompatible expectations of various audiences" (Baumann-Pauly, Scherer & Palazzo, 2016: 31) in complex and heterogeneous environments (Scherer, Palazzo & Seidl, 2013; Smith & Tracey, 2016). First is manipulation, which positions that organizations can actively influence social expectations by persuading or manipulating the perceptions of key stakeholders in their environment. Second is adaptation, through which organizations can change their organizational practices and explicitly adapt to societal expectations to maintain legitimacy. Third is argumentation, which builds upon a process of deliberation, and denotes that organizations can engage in open discourse with stakeholders to argue and negotiate the acceptability of its status quo and behaviour. For example, Castello and colleagues (2016) draw on manipulation, adaptation and argumentation (or moral reasoning) as dominant strategies in complex environments, and question how engagement with social media might be used to manage legitimacy in organizations. This resonates closely with calls to examine and illuminate perceived new forms of legitimation emerging through organizational use of contemporary technologies (Deephouse, Bundy, Plenkett Tost & Suchman, 2017). Here it is argued that legitimacy can be "gained through participation in non-hierarchical open platforms and the co-construction of agendas", and that certain

transitions are needed for organizations to be able to yield such an approach to legitimacy (Castello, Etter & Arup Nielsen, 2016: 402). Through what Castello and colleagues (2016) call the 'networked' legitimation strategy, organizations can perceivably manage and gain legitimacy through reducing control over engagements and relate non-hierarchically with key stakeholders.

Studies which have explicitly considered legitimation in pluralistic contexts also emphasize possibilities for organizations to "capture hybrid forms" of legitimation strategies (Baumann-Pauly, Scherer & Palazzo, 2016: 46; Castello, Etter & Arup Nielsen 2016). These highlight the possibility of combining legitimation strategies to manage different legitimacy demands, labelled the "paradox approach" (Scherer, Palazzo & Seidl, 2013: 261). This has yet to be explored consistently or in any considerable depth in the literature. It has, however, been explored empirically that strategies of manipulation, adaptation and argumentation can exist at the same time, and through the paradox approach it has been suggested that this is optimal in complex environments (Scherer, Palazzo & Seidl, 2013; Baumann-Pauly, Scherer & Palazzo, 2016). It is also suggested that through a hybridization of legitimation strategies, dynamics might move from typical control in the firm through manipulation of stakeholders to clearly defined strategies of deliberation, including to non-hierarchical and platform-controlled discussions through social media (Castello, Etter & Arup Nielsen 2016). Whilst this has offered a promising avenue in legitimation literature, it is noted that hybrid legitimation strategies pose potential risks for organizations, such as stakeholders perceiving the motives of the organization as disingenuous. Organizations may lose credibility, and rhetoric may be less effective, meaning hybrid legitimation strategies may not be a logical tactic. Instead, organizations might use hybridized strategies when resources are scarce and cannot adopt to all stakeholder demands at once. They may need to manipulate some audiences in their favour until resources are available to adapt to demands, or equally fully

engage with them (argumentation) (Baumann-Pauly, Scherer & Palazzo, 2016). Whilst hybridization of legitimation strategies is an important development, the concept remains nascent and demands further exploration, particularly through empirical studies.

Open strategy and organizational legitimacy

A multitude of uses and implications of openness in strategy have been alluded to in existing work. This includes use of OS during periods of transition (Yakis-Douglas, Angwin, Ahn & Meadows, 2017), for strategic decision-making (Luedicke, Husemann, Furnari & Ladstaetter, 2017), for managing organizational tensions (Dobusch & Kapeller, 2017), and as a tool for impression management (Whittington, Yakis-Douglas & Ahn, 2016; Gegenhuber & Dobusch, 2017). As we alluded to earlier in this paper, much literature, albeit indirectly, associates core purposes and potential implications of OS to the notion of organizations seeking to manage their legitimacy (e.g. Whittington, Cailluet & Yakis-Douglas, 2011; Aten & Thomas, 2016). Inclusion and transparency are stressed as means for organizations to gain insight regarding their legitimate purpose and direction (Tavakoli, Schlagwein & Schoder, 2017). Several works have shown promise in approaching OS and legitimation more explicitly, focusing upon the management or gaining of legitimacy as being a positive implication of openness in strategy (Whittington, Yakis-Douglas & Ahn, 2016; Gegenhuber & Dobusch, 2017; Luedicke, Husemann, Furnari & Ladstaetter, 2017; Dobusch, Dobusch & Muller-Seitz, 2017). Gegenhuber and Dobusch (2017), for example, express that transparent modes of OS through blogging platforms could ensure legitimacy for new ventures and their strategic direction, whilst Luedicke and colleagues (2017) stress how stakeholders and organizations might be able to legitimize strategic decisions through being open. Whittington and colleagues (2016) explain that leaders are being transparent when attempting to gain legitimacy and generate positive impressions for strategic direction.

We argue that, despite legitimacy being central to the notion of increased openness in strategy, the concept has largely been treated as an "effect" (Gegenhuber & Dobusch, 2017: 14) or "outcome" (Luedicke, Husemann, Furnari & Ladstaetter, 2017: 11) to date, rather than an explicit focus on how open strategizing might manage legitimacy.

RESEARCH SETTING AND METHODS

Case study context

This research focuses on the context of a professional association. Professional associations, sometimes referred to as a professional body or professional society, offer a unique setting for researching OS, and practice-based strategy work more generally. They are usually non-profit organizations which seek to further a profession through representation of that profession, its interests, and the development of those who work in it (Harvey, 2017). By their very nature, professional associations are pluralistic contexts, and are characterized by the existence of divergent and sometimes contradictory goals and objectives, whilst being made up of many diverse groups or 'constituencies' (Denis, Langley & Rouleau, 2007). In professional associations, groups and individuals will often have conflicting and dichotomous views on how their profession should be evolving and how the association should be defining their legitimate direction (Broady-Preston, 2006). The case setting for this research is a professional association for library and information professionals (anonymized as InfoLib in this paper). InfoLib represents those who work in library and information-based professions in the United Kingdom (UK). The empirical work is based on an OS initiative at InfoLib, the '*Shaping Future*' (SF) consultation. SF was launched in 2015 by InfoLib's new CEO as an "exercise in open strategy" for developing a new strategic plan with the organization's key stakeholders. The consultation ran from 25th September to 16th December 2015, and sought engagement and feedback from all its members, at this point upwards of 13,000, and any other interested parties such as professional interest groups and former members. InfoLib is

positioned here as an organization in the midst of a legitimacy crisis, and openly formulating a new strategic direction was motivated by a need to manage the dispersed and disjointed nature of InfoLib as an organization, to share the responsibility of setting a new direction for InfoLib, and ultimately the need for InfoLib to understand what the community want from their professional association. SF was given its own brand and was heavily promoted by InfoLib and its top management team. The launch of SF was initiated through InfoLib top management sharing their core priorities for the direction of the organization, with the potential contributors given the opportunity to discuss these further in their response to a web-based questionnaire and via hardcopy (written response, email). This was complemented by several less structured methods of strategic ideation, including face-to-face meetings with members, and discussion through social media channels, particularly Twitter. The consultation resulted in the publication of a summative report of the initiative, and draft and final strategic plans. In total, the practices used for open strategizing captured the opinions of over 1,000 stakeholders; primarily active InfoLib members.

Data collection, analysis and reliability

Due to the lack of studies examining OS and legitimation, an exploratory inductive method was key to allow findings to emerge from the data and improve our understanding of the phenomena at hand. To explore SF, a triangulation of different qualitative techniques was used. This included both primary and secondary data. The principle methods were semi-structured interviews and observation, but also some forms of documentation such as Twitter data were collected directly for this research. Secondary sources included documentation data such as web-based questionnaires, as they were conducted by InfoLib but were essential for complementing and providing further depth to the primary data collected, and to help offer a rounded account of practices used in SF. *Table 1* details the data collection techniques.

Insert Table 1 about here

Consistent with a practice-theoretical lens, the analysis followed an approach attending to the key practitioners and practices unfolding in episodes of strategy praxis. This approach was consistent with practice-theoretical works aim of achieving rich understanding of individuals involved in everyday strategizing activity (Whittington, 2006), whilst also aiming to use these to understand their enactment and impact on institutional phenomena (Smets, Aristidou & Whittington, 2017). To ensure validity and reliability in our work, and combat criticism of qualitative research as being unscientific and anecdotal, we integrated a number of considerations into our analysis. We translated key criteria from positivist, quantitative research into terms more suited to naturalistic, qualitative work. We adopted the terms credibility for internal validity, transferability for external validity, dependability for reliability, and confirmability to ensure a degree a neutrality in research findings (Guba & Lincoln, 1985). Several techniques were used to achieve these criteria, including triangulation for establishing credibility, thick description to ensure transferability, multiple stages and researchers involved in coding to aid dependability, and having clear stages in the analysis to provide an empirical audit trail (Guba & Lincoln, 1985).

The analytical procedure followed an inductive approach (Miles & Huberman, 1994), combined with considerations from practice-theoretical studies. The analysis consisted of three central activities: (i) data reduction, (ii) data display, and (iii) conclusion drawing and verification, and was suited to an inductive approach to analyzing qualitative data (Miles & Huberman, 1994). In practice-theoretical work, it has also been recommended to add a fourth activity -comparison with theory- and this helps align emerging findings and conclusions with current theories, helping to clearly define a contribution and ensure theoretical discussion is considered (Balogun, 2004; Jarzabkowski, Balogun & Seidl, 2007). These four central

activities translated into several stages in the analysis process, again consistent with approaches in strategy practice-theoretical studies (e.g. Jarzabkowski & Balogun, 2009). The first stage involved early-stage analysis and reduction of the interview and observation data, through referring to research diaries containing memos, and by producing first-cycle codes from sentences and paragraphs in interview transcripts to capture richness, using Nvivo software. This provided commentary on what was happening in the data and helped avoid being lost in a seamless web of ideas (Silverman, 2000). The second stage involved detailed coding and mapping the strategizing activity of participants through development of rich narratives (Langley, 1999). Detailed coding was continued in Nvivo software, with first-cycle codes from the early-stage analysis being refined through second-cycle coding to develop a greater sense of categorical organization of data. Categorization was based on both the research focus, and the guiding practice-theoretical lens, emphasizing practitioners and practices in strategizing. Subsequent themes were developed inductively, and to ensure trustworthiness and inter-coder reliability, the meanings of key themes were negotiated and then grouped into understanding competing demands of stakeholders and dynamics of (open) strategizing. This represented a form of data reduction and display, by which complicated 'things' are made more understandable (Miles & Huberman, 1994). Alone, text is cumbersome form of display. Therefore, stage three consisted of developing the narratives in relation to the findings with the aim of understanding dynamics of strategizing as distinct 'modes' (Gegenhuber & Dobusch, 2017). This meant that the output could be summarized through displays emphasizing the focal points of the strategy practice-theoretical lens. Stage four was key to grouping the previous stages and understanding how different activities of OS relate explicitly to legitimation. Key to linking OS to legitimation was the insight from each stage of the OS initiative, and the modes of OS identified, including the generation of strategic contents, and how these contents are then perceived and may or may not lead to

realized strategic actions. Further, synthesizing OS with legitimacy required an assessment of how modes of OS relate to the managing of legitimacy, and legitimacy outcomes and effects (Suddaby, Seidl & Le, 2013). Equipped with these concepts on managing legitimacy, the specific modes of OS identified in the previous stage were linked to specific legitimation outcomes. Also key were insights derived from the rich empirical data, supported by the secondary data, with the outcome being insight to how phases and modes of OS linked to explicit means of managing legitimacy (Gegenhuber & Dobusch, 2017). A display was used here to conceptualize the phases of OS, the practices and modes identified, and their connection with legitimacy (Dowling & Pfeffer, 1975). The final stage of the analysis involved discussing the outcomes of the work in relation to extant theory and practical implications, and the modes identified as relevant to legitimation as a process (Suddaby, Bitektine and Haack, 2017). This also helped to refine displays, ensuring clarity and applicability in line with the emerging findings (Miles & Huberman, 1994).

ANALYSIS AND FINDINGS

This first section of the analysis illuminates the main phases of SF and distinct modes of OS. This follows the analysis overview outlined by mapping a case story for the consultation (Langley, 1999; Jarzabkowski, Matthiesen, & Van de Ven, 2009) (*Figure 1*).

Insert Figure 1 about here

Figure 1 represents the SF consultation through three identified phases of OS, comprising different 'praxis episodes' (Whittington, 2006; Tavakoli, Schlagwein & Schoder, 2017) and activities with the 'practices' of OS being the central analytical focus. It also illuminates the level and units of analysis. The level of analysis is highlighted through the three phases and episodes, whilst the units of analysis are the strategizing practices central to each of the 'key strategizing activities' (Jarzabkowski, 2005). In relation to the level of analysis, the phases

and praxis episodes in strategy can be permeable and thus can overlap. However, the three phases highlighted are linear as demonstrated by their chronological presentation. What does vary between the phases are the contrasting degrees of openness demonstrated in each, particularly between different types of openness (transparency and inclusiveness), as will be a central aspect of the analysis later in this paper. By contrast, the activities outlined as part of each distinct phase do overlap. The first phase that is highlighted here is labelled 'planning and promotion', and in relation to key strategizing activities of SF, this phase comprises of one activity. Activity one represents the practices of planning and promotion in SF, more specifically outlining the activities related to understanding of the context, defining of the strategizing process and methods of consultation, illumination of strategic priorities to be discussed, and marketing of SF. The second praxis episode identified is labelled the 'consultation period'. Whilst the focus here is on strategic ideation by accessing widely distributed knowledge, the activities vary through the different open strategizing ideation practices utilized. The InfoLib CEO highlighted three layers of ideation: "online engagement", "face-to-face engagement", and "hardcopy engagement". This phase comprises of simultaneously occurring activities for collecting the opinion of participants. Four distinct activities have been identified, namely: a web-based survey, Twitter, face-to-face consultation events, and those responses received by hardcopy (written response, email). The final phase is labelled 'analysis and implementation'. Like planning and promotion, due to the concurrent and complementary nature of analysis and implementation practices in the InfoLib OS approach, these are bound here as one activity. This provides an account of the analysis of ideas and publication of strategic contents such as draft and final strategic plans, and the implementation of realized strategic actions. Therefore, outcomes of this praxis episode revolve around reflection and analysis from insights received through the ideation practices in the consultation period.

The overview of InfoLib's OS approach illuminates the prominence of different modes of open strategizing, in line with key dimensions of OS (Gegenhuber & Dobusch, 2017). There are four modes formally identified here: Broadcasting, Responding, Collaborating and Actioning. We refer to the dominant types outlined in much OS literature- strategic inclusion and transparency- (e.g. Whittington, Cailluet & Yakis-Douglas, 2011), and the 'degree of openness' to further define the extent of this type of openness in each mode.

In activity one, a variety of webpages and online documents were used by InfoLib management, primarily to communicate about the forthcoming consultation, and its core aims. Overall, the practices associated with the activity of planning and promotion here were found to be illustrative of a one-way communication from InfoLib top management to the InfoLib community as potential contributors to OS. InfoLib management had already formulated potential priorities and key vision statements as the basis of the four-year strategy, and communicated these to InfoLib stakeholders as being open for further discussion and refinement. The main outcome of the activity was therefore an open call for participation, through the devising and active communication of SF as a means of open strategizing, with structured methods proposed to enable ideation, and pre-defined consultation priorities also asserted by top management. We identify this as being a mode of open strategizing called 'Broadcasting'.

In activity two, the web-based questionnaire activity was illustrative of a controlled, one-way mode of inclusive open strategizing activity, particularly through a response from the InfoLib community to the organization's priorities and structure outlined for the strategy by top management through the questionnaire. Questionnaire contributors thus 'responded' to the call for opinion and ideas about the strategy, whilst InfoLib management actively observed and considered the responses of the community. We identify this mode of open strategizing as

being 'Responding'. In activity three, the first use of Twitter by InfoLib came through use of a designated hashtag (#InfoLib2020) and Tweets were monitored on an ongoing basis. It enabled the InfoLib community to observe the outputs from InfoLib top management, and be included in ideation through the enablement to respond with their own demands for the strategy. This was again a one-way mode of activity, limited by the word-limit of the platform. The second use of Twitter took the form of a structured two-hour long Twitter discussion. InfoLib emphasized this use of Twitter gathered more substantial strategic input as part of the consultation phase. The event was hosted by UKlibchat, an external interest group. This was illustrative of a two-way conversation between top management and SF contributors. It enabled an inclusive, structured two-way dialogue to take place with no hierarchy or barriers to participation. We identify the first use of Twitter as again being consistent with the mode of 'Responding'. The second use of Twitter, the discussion, was representative of a highly inclusive mode of open strategizing, which we call 'Collaborating'. In activity four the dominant activities, like the Twitter discussion event, represented an inclusive mode of OS in which the InfoLib CEO and consultation event contributors both actively interacted with the practices to discuss a legitimate InfoLib. Apart from being guided by a brief agenda, and in some cases a PowerPoint presentation, the consultation events had no formal structure, and any questions could be asked. We also identify this as a mode of 'Collaborating'. In activity five, OS was illustrative of inclusive strategy practices through the InfoLib community being able to respond to the structured, pre-set priorities in the consultation document through written response and email. The InfoLib community retorted to the call for opinion and ideas about the strategy, in a one-way response addressed directly to the InfoLib CEO. Although contributors expressed new ideas, the nature of strategic demands was primarily connected with priorities related to specific factions of the InfoLib

community (e.g. Public librarians, school librarians, knowledge managers). Again, we recognize this as an inclusive mode of open strategizing consistent with 'Responding'.

Lastly, activity six shows the analysis and actioning of strategic priorities in SF into a realized plan and new strategic directions. The activity was therefore illustrative of transparent strategic practice, through InfoLib being able to take the views of the community from the consultation phase, and respond to these through direct action, or through providing a rationale on strategic decisions. Illuminated here is a primarily structured, one-way activity from InfoLib top management to its community in relation to tangible outputs of open strategizing. We identify a final mode of open strategizing here and call it 'Actioning'.

Modes of strategic inclusiveness

The modes of Responding and Collaborating, prominent in phase two, were illustrative types of strategic inclusiveness, with InfoLib top management including the community in discussion around strategic directions, and in the generation of strategic contents. Responding represented, through one-way communication, how the InfoLib community responded when invited to participate in OS through certain practices, whether expressing opinions, ideas or simply through acknowledgement, this allowed the InfoLib top management to actively gather ideas and opinions, and take these into consideration as an essential part of the consultation process. It is through inclusive strategizing such as this that emerging strategy contents began to take form. Responding is typical of a lower degree of openness in relation to inclusiveness, enabling the InfoLib community to contribute to strategy, but characterized by one-way communications which are mainly structured, offering no direct route to symmetric conversation about strategy. This was evident through use of the questionnaire and hardcopy responses, and to a lesser degree the Twitter Hashtag (which was not extensively utilized as means of Responding). Collaborating represents a live, two-way discussion

between the InfoLib top management and community, in which ideas and opinions were negotiated and refined. A major difference with Collaborating is that InfoLib top management and the community symmetrically discussed demands and strategic directions. Although oftentimes structured, Collaborating offered a perceivably higher degree of openness relating to inclusiveness, being illustrative of a two-way symmetrical form of conversation around strategy with those responsible for strategic decision-making. The UKlibchat Twitter discussion and face-to-face consultation events demonstrated this mode. Also significant here is that these practices were not so clearly defined by pre-set priorities as seen in Responding.

Modes of strategic transparency

The modes of Broadcasting and Actioning are identified as being types of strategic transparency, present in phases one (Broadcasting) and three (Broadcasting and Actioning). Openness here was consistent with InfoLib top management making strategy contents and actions visible to the InfoLib community. Broadcasting represents a one-way activity from InfoLib top management to the community primarily during the activities of planning and promotion. Key is communicating, publicizing and updating about SF, enabling contributors to take in information whilst considering what action to take through the plethora of strategizing methods outlined for the consultation period. Broadcasting is also prominent in the analysis and implementation phase, representing the sharing of strategic contents, such as draft and final strategic plans with the community, primarily through hosting documents on InfoLib's website, and sharing these through internal communication channels such as email, and external channels such as social media. In sharing insights, InfoLib top management used the strategic documentation to provide rationale for strategic decisions, and clarity on future actions. Broadcasting is interpreted here as a low degree of transparency, illustrating InfoLib management sharing strategic insights and contents. Actioning is illustrative of InfoLib top management finalizing strategy contents and then realizing these through implementation of

new strategic actions, such as programmes, products, norms and routines. This shows transparency in relation to taking ideas from the community and transparently feeding these into future strategy. Actioning represents a higher degree of openness relating to transparency, by demonstrating a commitment to taking demands from the InfoLib community and inferring these through realized strategic intent.

Inclusiveness: Responding and Collaborating as legitimation

Key to Responding and Collaborating as legitimation were their use in reducing control in strategy and being inclusive modes of OS, particularly by enabling deliberation between InfoLib top management and the community. They could ideate and refine strategy through open discourse about the future direction of InfoLib. This was achieved through practices which enabled a combination of one-directional (Responding) and collaborative two-way dialogues (Collaborating). The perceived legitimation here is consistent with gaining moral legitimacy, typically enacted through the establishment of expectations of the community, with InfoLib top management gaining an understanding of desired organizational actions through ideation and dialogue with the community. The need for this was emphasized by the InfoLib CEO:

> "It's quite easy to put people off with this sort of approach, coming in and saying I'm going to create this whole sense of newness. So, in a weird kind of way, it really, really helps that InfoLib has had seven or eight years of declining membership, because you can just point to that and there's a reason why and we need to seize that mantle and get on with it"

The practices through which Responding was enabled were structured and hierarchical, meaning that whilst the community had the opportunity to engage in strategic discussions. The practices through which this was possible were oftentimes limited to expression of demands, with no opportunity for extensive strategic discussion. As the InfoLib CEO emphasized, the questionnaire and hardcopy responses were designed to be this way, being "quite directing" rather than open ended. Regarding Collaborating, the conversation was representative of a freeform dialogue. Key to examples of Collaboration (Twitter discussion

event, consultation events) was the attempt to re-establish legitimacy by talking directly with those who have legitimacy demands through ongoing discourse. Although open and inclusive, enabling two-way dialogue, some of the consultation events were hierarchical and limited to a low number of select individuals such as committee members of InfoLib regional sub-groups. The larger, more open consultation events were structured using a Q&A style format, with use of PowerPoint presentations and structured topics of discussion. The UKlibchat hosted Twitter discussion offered a different dynamic, with no barriers to participation, and the audience was much larger with the discussion open to anyone. Adopting this two-way dialogue was indicative that the previous methods of dictating strategic directions from the top management team, with no inclusive practices, was not working for InfoLib.

It can be perceived here that the modes of OS linked to inclusive strategizing practices were a useful means of legitimation through breaking typical means of control and top-down strategizing. They enabled different types of open discussion about desired expectations, in (re)-establishing and negotiating the desired directions of the organization by its community, the sources of legitimacy.

Transparency: Broadcasting and Actioning as legitimation

Key to Broadcasting and Actioning as legitimation were their use as transparent modes of OS, particularly in enabling promotion of SF and through demonstrating implementation of strategy. The managing of legitimacy was through InfoLib attempting to influence how the community view its legitimacy, through both pre-determining strategic priorities and discussion points, and justifying its choice of strategic direction and intended action (Broadcasting), consistent with gaining pragmatic legitimacy. Additionally, InfoLib attempted to adapt and conform to expectations through commitment to action by realizing the demands of stakeholders (Actioning), as is consistent with cognitive legitimacy.

Broadcasting was imperative in phase one of SF in empowering openness, and was also a means of enabling InfoLib to dictate the nature of the strategic conversation with its community, and as a means of reacting with perceived self-interest to specific legitimacy demands. First, Broadcasting related to the managing of legitimacy in that InfoLib top management directed the nature of pre-defined information it shared with the InfoLib community, both maintaining control over the terms and directions of SF, whilst setting the agenda in their favour through marketing materials and structured documentation. As alluded to by the InfoLib CEO, elements of the consultation document and the questionnaire were directed in nature. Although several methods offered more autonomy regarding the topics of discussion, the methods chosen were again dictated by InfoLib management. Second, Broadcasting was used by InfoLib top management during strategic analysis and implementation to share strategic information, again directly about their actions and why they had opted to take these. Control over strategy was firmly in the hands of top management, who analyzed the input of the community to their interpretation, and had ultimate choice over strategic priorities. The InfoLib CEO expressed that this represented a mechanism to 'rebuff' the demands of the community when necessary, explaining that InfoLib had to be prepared to do this if they believed demands made by the community were not in the best interests of the organization:

> "Open strategy is disruptive and risky, because essentially what if, not so much what if people say the wrong things, but is it susceptible to more bias or a particular motive? So, essentially if a small vocal minority of our members got together and answered… one thing InfoLib absolutely has to focus on is our agenda, what mechanism would we have to push back against that and say, you know, we're not going to listen to that message"

One example of this regarded London-centricity in InfoLib, where some in the community expressed that InfoLib should sell their headquarters building and move to a more central location in the UK. However, in the publication of draft and final strategic plans InfoLib attempted to influence and convince the community that the headquarters were best placed to remain in London. Here they used carefully considered language to distance the perception

that InfoLib is a London organization, instead insinuating that this is just the location of InfoLib's offices and body of staff. Key was InfoLib reasoning with the community as a means of controlling societal expectations of organizational practice.

In relation to managing legitimacy, Actioning as strategic transparency differs through InfoLib top management translating the strategic demands of the community into action. InfoLib top management chose not to conform to their own agenda and directions or provide vague assurances to the community, as seen in Broadcasting. Instead, Actioning demonstrated InfoLib's obligation to adapt and conform to demands and pressures from their community. The rationale for this was stressed by the chair, and a member of the InfoLib board:

> "I think trustees were very keen that there was a clear, visible response to the issues raised by members. So, if you like, we were looking at that about finding assurance or reassurance for members, and demonstrate that InfoLib was focusing on the areas that members thought were important"
> "It's that cycle that goes the full circle, so you don't just talk and consult, but you're seen to be listening. It's seen to be affecting change"

There were numerous examples of this. For example, InfoLib's commitment to advocacy and campaigning, which was a central demand of the InfoLib community, was highlighted as the dominant outcome of the consultation. InfoLib demonstrated commitment to this as a strategic direction through the first major action following SF, with the launch of a political advocacy campaign in December 2015. The chair of the board expressed that this demonstrated that they had listened to members, and were willing to be more responsive to the needs of the membership through demonstrating a commitment to action:

> "I think the feedback from the consultation reinforced the expectations and sense of urgency in the members, and it was an early demonstration of how InfoLib can and should respond to member views from the consultation"

It is therefore indicative that the modes of OS linked to transparent strategizing can manage legitimacy in several ways, particularly through influencing social expectations by

influencing and persuading the community about particular actions, and by conforming to the expectations of the community through realized strategic actions.

DISCUSSION OF OPEN STRATEGY MODES AND LEGITIMATION

This discussion aims to answer the main research question: *'How does an open strategy approach represent a process of legitimation for managing the competing demands of organizational stakeholders?'*. The contributions of the research are outlined in detail, a framework showing OS as a process of legitimation is provided, and this is also supported by discussion with the literature on OS, pluralistic contexts, and organizational legitimacy.

Shaping Future and legitimation strategies

The findings demonstrate that modes of OS were consistent with means of managing legitimacy. For example, the insights from the Broadcasting mode of open strategizing identified were akin to legitimation strategies of 'manipulation' (Suchman, 1995; Pache & Santos, 2010; Scherer, Palazzo & Seidl, 2013), and InfoLib used these strategies in two dominant ways. The first means of Broadcasting saw the managing of legitimacy during phase 1. In relation to manipulation, this was an attempt by InfoLib top management to influence the expectations and directions of open strategizing through "advertising" and active promotion, the dissemination of information (such as pre-determined strategic priorities), and other "instruments of strategic public relations". This signified maintained influence and control over strategy (Oliver, 1991; Scherer, Palazzo & Seidl, 2013: 264; Baumann-Pauly, Scherer & Palazzo, 2016). Second, was use of manipulation strategies of legitimation in phase three, when responding to competing demands directly through published strategic contents, and realized strategic action. Legitimacy 'tactics' of influencing and controlling were prevalent here, as opposed to InfoLib being openly dismissive over legitimacy demands (Oliver, 1991; Pache & Santos, 2010), and transparency was a key means

of communicating and influencing through rationale for strategic choices which went against the demands of the community. This is also demonstrative of InfoLib attempting to alter the perception of certain demands through manipulation (Pache & Santos, 2010; Baumann-Pauly, Scherer & Palazzo, 2016).

Strategies of managing legitimacy closely aligned to manipulation "may prove insufficient" and organizations may struggle to influence or persuade relevant individuals or groups (Scherer, Palazzo & Seidl, 2013: 267), or the use of manipulation may be seen and dismissed as 'cheap talk' (Whittington, Yakis-Douglas & Ahn, 2016), and not a genuine attempt to adapt to changes in the environment. Equally, manipulating through use of vague language, or intent of action, might only buy organizations so much time before stakeholders begin to question approaches (Kraatz & Block, 2008). In such situations, organizations might resort to managing legitimacy through discussing demands, or 'argumentation' with stakeholders more overtly (Suchman, 1995; Pache & Santos, 2010; Baumann-Pauly, Scherer & Palazzo, 2016). This was demonstrated through modes of Responding and Collaborating in phase two of SF, with InfoLib engaging in discourse with its sources of legitimacy regarding strategic priorities (Pache & Santos, 2010). By enabling strategic discussion, the organization's community could argue and debate its acceptability and behaviour (Suchman, 1995; Palazzo & Scherer, 2006). Unlike manipulation strategies, argumentation meant that InfoLib's top management and community were able to learn from each through a range of structured and un-structured strategizing practices (Suchman, 1995; Scherer, Palazzo & Seidl, 2013; Baptista, Wilson, Galliers & Bynghall, 2017). As opposed to InfoLib top management sharing strategic priorities and then enacting these by persuading the establishment of their own position, demonstration of argumentation ultimately meant that InfoLib and their community could work towards common solutions, based on "sound argument" and thus serving the "well-being of society rather than egoistic motives or narrow interests" in the re-establishing of

legitimacy (Scherer, Palazzo & Seidl, 2013: 264). Modes of Responding and Collaborating were not demonstrative of explicit strategic action, however, instead they were a means of understanding and negotiating the meanings of legitimacy demands (Scherer, Palazzo & Seidl, 2013). The strategy of argumentation enabled the opportunity to build upon a process of deliberation towards understanding demands of stakeholders before taking substantiated strategic action. Additionally, although a valuable means of managing legitimacy, argumentation is not a permanent solution and does not replace other legitimation strategies which more directly manage legitimacy through direct action. This suggests a need to move towards either manipulation strategies which enable the organization to take action and provide rationale for decisions, or strategies which enable more direct conformity to strategic demands of stakeholders (Baumann-Pauly, Scherer & Palazzo, 2016). Ultimately, argumentation is representative of a "retreat strategy" and one that enables dialogue between the organization and its community, when mechanisms of social routine (such as manipulation) fail, or as a proactive strategy for establishing legitimacy and trust with stakeholders. Equally, it might be used as a means of addressing long-standing, or emerging, issues which may erode legitimacy in the future (Scherer, Palazzo & Seidl, 2013: 267).

InfoLib moved beyond argumentation towards more directed strategic action in phase three of SF, where a combination of legitimation strategies were identified as working in tandem. Through the learning processes seen in discussion-based strategies of argumentation, one example is that the organization might revert to a top-down means of strategizing, and push back against stakeholder demands. This is achieved through active manipulation and by providing rationale for strategic action which resonates with the interest of the organization and its top management, rather than the desires and deemed acceptability of other individuals and key stakeholder groups (Scherer, Palazzo & Seidl, 2013). Equally, organizations might demonstrate a transparent approach, and follow argumentation by adapting to emerging

demands and conform to them as acceptable and desirable strategic directions informed by its community (Suchman, 1995; Kraatz & Block, 2008; Luedicke, Husemann, Furnari & Ladstaetter, 2017). For example, whilst InfoLib continued to persuade or manipulate on certain demands, as seen through continued use of Broadcasting in the third phase (for example, the rationale for keeping the InfoLib headquarters in London), the organization demonstrated a more widespread adaptation to demands, as seen through Actioning (for example, the launch of the new political advocacy campaign). Actioning, as highlighted in this work, is a means of managing legitimacy akin to adaptation in relation to predominant competing demands of stakeholders. The attempted balancing of demands is also relevant here (Kraatz & Block, 2008), and InfoLib demonstrated an attempt to balance competing demands, and bring stakeholders into closer association, and manufactured cooperative solutions through explicit strategic actions in the face of the demands inherent in the InfoLib community. The alteration of organizational practices and to conform to expectations of the community is also a means of maintaining or managing legitimacy in the long-term (Deephouse, 1996), particularly when meeting the legitimacy demands of powerful stakeholder groups, such as public librarians in InfoLib's case (a group who comprise the numeric majority of the InfoLib membership) (Palazzo & Scherer, 2006). It is also notable here that several of the most prominent demands of stakeholders resonated closely with InfoLib top management's own pre-set priorities (for example, advocacy), suggesting top management were perhaps more willing to conform to these suggestions as they also resonate with their own thinking and desire for the organization's strategic direction.

Through discussing the findings of SF here, InfoLib is highlighted as an organization that was able to fulfil multiple purposes through an OS approach. InfoLib embodied multiple demands and successfully verified these into explicit strategic rationale and action. This means InfoLib might then interpret the outputs of SF, and their intended direction through this, as especially

legitimate whilst embodying multiple values and demonstrating the ability to achieve goals in-line with competing demands of its community (Kraatz & Block, 2008). As three broad means of analyzing organizational responses to legitimacy, the agency-intensive strategies relating to manipulation, adaptation and argumentation have been highlighted as particularly relevant in line with the literature on managing legitimacy in pluralistic contexts. However, few studies have examined the micro aspects of these means of legitimation as has been the goal of this study (Bitektine & Haack, 2015).

Hybridization of legitimation strategies in Shaping Future

It was evident that legitimation strategies were switched between over time, as per the phases and modes of OS. Literature has emphasized that organizations choose one approach to legitimation, and then limit themselves to this strategy regardless of the situation or environment (Scherer, Palazzo & Seidl, 2013; Baumann-Pauly, Scherer & Palazzo, 2016). More recent studies, particularly those focused on legitimation in complex environments, have branded this an unnecessary restriction and that as different legitimation strategies employ distinct purposes and inherent strengths and weaknesses, organizations can employ multiple strategies dependent on circumstance (Scherer, Palazzo & Seidl, 2013; Castello, Etter & Arup Nielsen 2016), including simultaneously (Baumann-Pauly, Scherer & Palazzo, 2016). These legitimation strategies are in conflict with traditional 'either/or' views of legitimation (Lewis, 2000), such as 'one-best way' and 'contingency' approaches which take a one-dimensional view of approaching legitimacy, and are perceived to be unsuitable in complex environments (Palazzo & Scherer, 2006; Scherer, Palazzo & Seidl, 2013). For InfoLib, several legitimation strategies are evident throughout SF, and these were both switched between and used in tandem. SF is therefore demonstrative of a hybridization of a repertoire of different legitimation strategies (Pache & Santos, 2010; Baumann-Pauly, Scherer & Palazzo, 2016). Taking such an approach is akin to a 'paradox approach' to legitimation,

which might combine strategies to manage diverse and oftentimes competing demands. By employing various legitimation strategies, organizations in pluralistic contexts are likely to be more successful in preserving their legitimacy over time (Scherer, Palazzo & Seidl, 2013). The rationale for InfoLib hybridizing legitimation strategies perceivably relates to several factors regarding control, time and resources (Baumann-Pauly, Scherer & Palazzo, 2016; Castello, Etter & Arup Nielsen 2016). In particular the organization had a lack of both time and resources to adapt to all strategic demands, and it was evident that there was a need for top management to control expectations, whilst providing rationale for decisions regarding other demands in line with their own strategic beliefs. This is emphasized in the agency-intensive strategies of manipulation, in which organizations might not be able to comply with all stakeholder demands and instead need to manipulate audiences until resources are available to either engage in discussions about legitimacy demands, or potentially adapt to these demands more explicitly (Oliver, 1991; Suchman, 1995; Baumann-Pauly, Scherer & Palazzo, 2016).

The 'locus of control' was also important in relation to legitimation strategies and their hybridization. The locus of control is the extent to which organizations and their top management teams control events which influence legitimacy (e.g. Castello, Etter & Arup Nielsen 2016). Strategies of manipulation are consistent with an internal locus of control, and organizations can influence how their communities perceive their legitimacy. The strategies of managing legitimacy through Broadcasting showed control with InfoLib and the top management team, where the rules of engagement were defined by InfoLib, and authority was 'firm-centric' and defined by one-way communications (Castello, Etter & Arup Nielsen 2016). Broadcasting showed pragmatic legitimacy where legitimacy was dependent on the benefits that are perceived to emerge from InfoLib's existence or behaviour (Suchman, 1995). For strategies involving active enablement of discussion such as argumentation, the locus of

control is defined as being neither internal nor external, and instead legitimacy results from extant discourses that connect organizations and their environment such as their communities, and control is in the deliberative process itself (Scherer, Palazzo & Seidl, 2013; Castello, Etter & Arup Nielsen 2016). Responding was an example of this in SF, showing control in a deliberation process where the rules and norms were negotiated by organizational stakeholders both internally and externally, with authority flattened through a "formalized track" of deliberative strategizing with primarily one-way communications (Castello, Etter & Arup Nielsen 2016: 423). Collaborating was similar, however in the case of the Twitter discussion the control was in the platform which the InfoLib community were using to strategize, where authority and hierarchy was removed, equal access to participation was enabled, and two-way symmetric communication based on open access to a public platform was allowed. This was more demonstrative of a 'networked' strategy of legitimation through use of contemporary technologies. Subsequently, such networked strategies of legitimacy through social media enable two-way interactions between participants without formal hierarchy (Castello, Etter & Arup Nielsen 2016), and are demonstrative of new forms of legitimation (Deephouse, Bundy, Plenkett Tost & Suchman, 2017). The legitimacy outcome for strategies of Responding and Collaborating is demonstrative of moral legitimacy, where organizational legitimacy rested on an explicit moral discourse about the acceptability of InfoLib's activities (Suchman, 1995). Those strategies which display direct adaptation of demands assume an external locus of control, where organizations are subjected to certain pressures and routines enacted by their environment and the sources of legitimacy (Suchman, 1995; Castello, Etter & Arup Nielsen 2016). In relation to Actioning, the rules of engagement were defined by actors in terms of their specific demands, and control was from outside the organization in the InfoLib community and their expectations of a legitimate InfoLib. Here, the programmes and projects of the strategy were led by InfoLib with the view of adapting

new norms through one-way communications (Castello, Etter & Arup Nielsen 2016). The legitimacy outcome was that of cognitive legitimacy, created as InfoLib pursued goals deemed to be proper and desirable (Suchman, 1995).

The exhibiting of multiple legitimation strategies, and their relevant locus of control, was a means of InfoLib navigating multiple demands of the community. The paradox strategy was key to managing legitimacy in a context characterized by competing demands of stakeholders. Through hybridizing strategies InfoLib managed their action over the course of SF. In managing legitimacy, the organization could dictate when they prioritize and take action to satisfy demands of the community.

Conceptualizing Shaping Future as a process of legitimation

The framework showing SF as a process of legitimation *(Figure 2)* is developed from the insights induced in this research, and in discussion with bodies of work on OS and managing legitimacy in pluralistic contexts. As has been illuminated through the findings, SF is conceptualized comprising three praxis episodes. The nature of OS practices and their relevant modes are central to understanding open strategizing activity in relation to legitimation, particularly in how phases relate to types of OS (transparency and inclusiveness), and control over strategic engagements.

Insert Figure 2 about here

The failing of the old model of top-down strategizing at InfoLib (as was illuminated in the findings) meant that the open approach of SF was recognized as being necessary for InfoLib's legitimacy going forward. Whilst InfoLib demonstrated transparency in sharing strategic priorities and information, the organization maintained control over the engagement in the phase of planning and promotion. This was representative of manipulation, in that InfoLib

actively attempted to influence and persuade the community regarding societal expectations (the legitimacy of the organization and what should be the main priorities for its future direction). This is shown in the arrow representing the maintaining of control (A) in phase one. The arrow pointing towards manipulation (B), shows that organizational practices and directions of InfoLib top management are attempting to control and shape societal expectations of the InfoLib community through the dissemination of strategic information, lobbying, and other instruments of strategic planning and promotion. An arrow also indicates how Broadcasting was key to enabling the conditions for InfoLib to have open, inclusive strategic discussions with its community (C). In the consultation period control was reduced, breaking the norms and control over strategic engagements in order to discuss what makes a legitimate InfoLib in the opinion of its top management and community through strategic inclusiveness. This was representative of argumentation, including the networked strategy of legitimation highlighting non-hierarchical equal access to discussions via online platforms, emphasizing InfoLib's attempts to open dialogues around strategy and its legitimacy. This is shown in the arrow representing the reducing of control in the consultation phase (D), and the arrow pointing towards argumentation (E) which signifies that organizational practices and directions are in tandem with negotiating societal expectations of stakeholders. In analysis and implementation, control was re-gained by InfoLib, and the formal discussions of the consultation stage were ended. Here, InfoLib persuaded stakeholders about decisions made that went against strong opinion of the community, whilst also adapting to stakeholder demands on other key issues, thus balancing the protection of InfoLib and top management's own priorities, and the conformity to strategic demands and legitimate expectations. This was representative of both manipulation and adaptation, and is indicated by the arrow showing the re-gaining of control in the analysis and implementation phase (F). The arrows pointing towards and away from manipulation and adaptation (G) show organizational practice and

direction shaping societal expectations (manipulation) and societal expectations shaping organizational practice (adaptation). InfoLib are both shaping practices to persuade the community of its directions, whilst changing other practices to meet legitimacy concerns of their most powerful stakeholder groups.

CONCLUSIONS, IMPLICATIONS AND FUTURE RESEARCH

This research has recognized and addressed a significant gap in that the link between OS as a process of legitimation in pluralistic contexts has not yet been explored in existing works. The research has approached OS as a stream of research which seeks to be understood as a social practice. A practice-theoretical perspective for exploring institutional phenomena were significant in analyzing the practices involved in OS, and to conceptualize open strategizing in the case context as a process of legitimation. In addition to the central aim of furthering OS research, this paper resonates with an important sub-set of strategy research at the nexus of legitimacy and strategizing in pluralistic contexts (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006). The framework emerging from our work shows OS in relation to legitimation and the management of complex competing demands of organizational stakeholders. The explication of the paradox strategy of legitimation, and understanding of different legitimation strategies were significant to realizing how OS is a means of managing legitimacy, offering a contribution beyond legitimacy being an effect or outcome of openness in strategy. Ultimately, the contribution of this paper has demonstrated how different modes of OS resonate, through hybridization of legitimation strategies, to the management of competing legitimacy demands of organizational stakeholders strategizing over time.

The implications for practice emerging from this research are also significant. Several practical implications lie at the intersection of our contribution. Building on earlier conjecture, the understanding of OS in this study has illuminated an increased understanding of the

process of the phenomenon, providing more in-depth empirical understanding of OS activity. Within this is an explication of the phases of OS praxis, and a plethora of OS practices. One such implication here is that, realistically, practitioners can use these insights to develop their own approaches to OS, being able to interpret from this research how open strategizing practices interlink with broader episodes of strategizing over time, in the realization of strategy contents (Jarzabkowski, 2005). Additionally, this research has explored an example of an organization facing a more multi-faceted world, driven by the competing expectations and demands of key stakeholders. This is amplified by knowledge being spread across the organization, including geographical locations which can create silos of groups with different diverse interests (Denis, Langley & Rouleau, 2007). This makes understanding legitimacy in contexts defined by pluralism increasingly pertinent, and here the understanding of managing the competing demands of stakeholders through an OS approach to legitimacy is a key practical implication. New ways are needed for managers to manage their organizations' legitimacy, and this assumption means a pluralistic understanding of legitimacy is also pertinent for practitioners (Kraatz & Block, 2008; Scherer, Palazzo & Seidl, 2013). On reflection, a principle driver of this research was an ontological motivation, to understand the implications of pluralism and the management of legitimacy as reflective of what organizations and their top management teams are facing, and to explore OS as a logical and increasingly apposite means of managing competing demands towards guiding legitimate direction. Ultimately, the detailed case story here (Langley, 1999) illuminates OS as a means that organizations and managers, particularly in pluralistic contexts, can manage their organizational legitimacy. The final framework displayed in this paper also enables increased insight for managers regarding their approach to pluralism, and might provoke thought on how new approaches might be used, including those which are more innovative, radical, technology driven, and ultimately, open.

This study has several perceivable limitations. Here we link perceived limitations with potential avenues for future research. In terms of theory, the research is limited by the dominant theoretical and conceptual stances guiding this work. The empirical focus of the work, namely the focus on pluralism in a professional association, is also central to a specific context and thus may not be congruent with other organizations. One line of further research stems from the modes of OS outlined in this work. Particularly, further research might develop similar views of open strategizing to see how OS creates certain dynamics of action (Gegenhuber & Dobusch, 2017) (such as seen here through Broadcasting, Responding, Collaborating and Actioning). Openness is a dynamic process that should be viewed as allowing movement along and between inclusion and transparency and towards and away from openness (Hautz, Seidl & Whittington, 2016). The limitation of this research being induced through a single case study means that the findings are context specific, thus reducing generalisability of the work. However, context specific research is important in strategy, particularly to gain rich understanding of different strategizing environments and situations (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006). The understanding of strategy in pluralistic contexts is imperative in fast changing organizational environments. Understanding open strategizing in pluralistic contexts is a compelling and relevant stream of research which requires further attention. Due to their unique nature, longitudinal studies such as ours will help understand these complex environments and how openness, particularly in strategy, can help to explain strategizing in pluralistic contexts. However, research might also employ a research design which explores multiple case studies, and attempts to actively compare open strategizing in different contexts. Another prominent avenue for further research here is to build on this study by further explicating how OS represents legitimation in other contexts. Indeed, exploring the use of differing open strategizing practices, and

dynamics, might induce varied findings which contrast or build upon the legitimation process outlined in our paper.

In sum, this research has helped to further develop the concept of OS and legitimacy, and define the core dynamics of OS to legitimation as a process. Our paper has provided a framework, and a platform for future research which might further recognize the significance of OS in relation to legitimacy, and as embedded in pluralistic contexts.

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TABLE 1

Data collection techniques used to explore the InfoLib case study

Data collection techniques	
Semi-structured interviews	30 semi-structured interviews with 26 participants. Length of interviews between 34 and 136 minutes, average length of 63 minutes.
Participant observation	6 days of participant observation, 4 days at face-to-face consultation events, and 2 days at InfoLib headquarters.
Documentation data	1655 Tweets, 599 web-based questionnaire responses, hardcopy responses, strategic planning documents, draft and final strategic plans, board meeting minutes, PowerPoint decks, internal reports, magazine articles, and blog posts.

FIGURE 1

The chronological phases, praxis episodes and key activities of Shaping Future
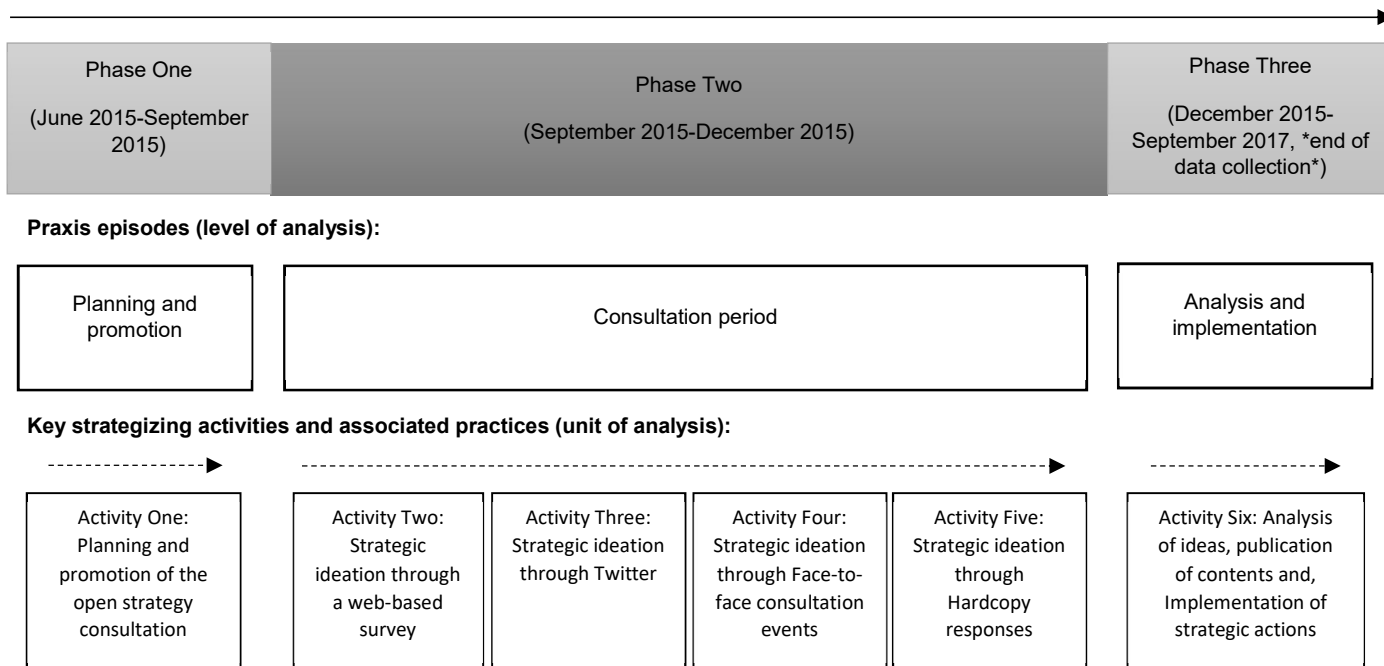
Shaping Future strategy consultation

Phase One (June 2015-September 2015)	Phase Two (September 2015-December 2015)	Phase Three (December 2015-September 2017, *end of data collection*)

Praxis episodes (level of analysis):

Planning and promotion	Consultation period	Analysis and implementation

Key strategizing activities and associated practices (unit of analysis):

Activity One: Planning and promotion of the open strategy consultation	Activity Two: Strategic ideation through a web-based survey	Activity Three: Strategic ideation through Twitter	Activity Four: Strategic ideation through Face-to-face consultation events	Activity Five: Strategic ideation through Hardcopy responses	Activity Six: Analysis of ideas, publication of contents and, Implementation of strategic actions

FIGURE 2

Open strategy as a process of legitimation