Opening up emotionally: How top managers use peripheral actors' emotional expressions during inclusive strategy formulation

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ABSTRACT

In this paper, we build theory concerning how top managers can capture and use the emotional expressions of peripheral actors—actors who are not typically involved in strategy—to help them formulate strategy, using a real-time case. We show how the existence of emotional tumult amongst peripheral actors can force top managers to reassess strategy and engage in 'emotion processing.' Through three inter-related processes—canvassing, harnessing, and integrating—top managers are able to solicit emotional expressions from peripheral actors and understand them in such a way that they provide top managers with information regarding the appropriateness of their strategic decisions and directions, as they formulate strategy inclusively. Top managers consider the 'emotional volume' of issues that are raised by peripheral actors, in terms of how frequently and emotionally they are expressed, allowing them to determine which issues demand attention and action. When peripheral actors express positive emotions, it signals approval of and support for strategy, whereas expressions of negative emotion can indicate the existence of problems and a need for top managers to adjust the contents of strategy. This study has important implications for the literature on strategy formulation and emotion, elucidating how emotional expressions of those outside the organizational upper echelons can be used as an informational resource during strategy formulation.

1. Introduction

It is well-established that the emotions experienced by top managers can influence how they formulate strategy because emotion can shape cognition and behavior (Hodgkinson and Healey, 2011; Brundin et al., 2022). For instance, the negative emotions that top managers at Nokia felt during interactions with Google led to them partnering with Windows (Vuori and Tushman, 2024), whilst Netflix's success in altering its strategy to become an online streaming platform has been attributed to top managers' positive emotions towards achieving this outcome (Raffaelli et al., 2019). There is also evidence that the emotional expressions—observable (non)verbal displays that can signal internal emotional experiences, intentions, and motivations (Stephens et al., 2013; Vuori et al., 2018)—of top managers can affect strategy formulation. These emotional expressions can affect how executives collaborate during strategizing (Liu and Maitlis, 2014), how information is shared (Netz et al., 2020), and can influence both how, and which, decisions are ultimately made (Samra-Fredericks, 2003; Brundin and Nordqvist, 2008).

A small body of work suggests that peripheral actors, such as middle managers (Burgelman, 1991), consultants (Jarzabkowski and Kaplan, 2015) and employees (Splitter et al., 2024) might also express emotion in a way that affects how top managers formulate strategy. For example, peripheral actors may express negative emotions when top managers' strategic decisions violate their expectations, forcing top managers to reconsider issues (Feldman and Quick, 2009; Toubiana and Zietsma, 2017). In some circumstances, peripheral actors' expressions of negative emotion have been shown to deter top managers from engaging with—and

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addressing—pressing strategic issues (Maitlis and Ozcelik, 2004), which may lead to conflicts that undermine strategizing (Lundgren-Henriksson and Sorsa, 2023). There is also emerging evidence that emotional expressions might be a source of information for top managers: Vuori et al. (2018) found that when peripheral actors suppressed their negative emotional expressions during a merger, top managers remained unaware of deficiencies within the strategy, resulting in its failure. In other words, top managers were deprived of information concerning the efficacy of the strategy.

The possibility that top managers might be able to utilize the emotional expressions of peripheral actors as information to help formulate strategy is intriguing, particularly in light of recent calls for managers to pay greater attention to emotion during the strategy process (Hodgkinson and Healey, 2011; Healey and Hodgkinson, 2017). Indeed, research in psychology suggests that emotional displays and expressions can provide insight and guidance to observers, on how they should subsequently behave (for an overview see Van Kleef, 2009). The need to study and understand how peripheral actors' emotional expressions might be used by top managers during strategy-making is pressing, given the growing prevalence of open strategy processes emphasizing the inclusion of peripheral actors beyond strategy professionals and executives (e.g., Whittington et al., 2011; Hautz et al., 2017; Dobusch et al., 2019; Langenmayr et al., 2024; Splitter et al., 2024). Yet, it remains unclear how top managers might solicit or use peripheral actors' emotional expressions when formulating strategy.

The intention of this study, therefore, is to explain: 'How can top managers capture and use the emotional expressions of peripheral actors for strategy formulation?' We explored this question using a real-time case study of an inclusive strategy process (Miles and Huberman, 1994). Specifically, we examined how a professional association for library and information professionals – CILIP – formulated a new strategy by involving a range of peripheral actors. CILIP's top managers invited their entire professional community (e.g., relevant professionals, members, employees, advocacy groups) to contribute to the development of a new long-term strategy for the organization. We focused on how these peripheral actors expressed their emotions towards the outlined strategic direction(s), and how top managers recognized and drew upon emotional expressions when formulating (and later, implementing) a new strategy.

Our study contributes to the literature on (open) strategy formulation and emotion, by elaborating how top managers can utilize peripheral actors' emotions to formulate strategy. First, we suggest that through emotion processing, peripheral actors' emotional expressions can become an informational (e.g., Vuori et al., 2018), rather than a motivational resource (e.g., Brundin and Nordqvist, 2008; Feldman and Quick, 2009), that top managers can use when formulating strategy. Second, we respond to calls for research explaining what determines the allocation of top managers' attention during inclusive strategy formulation (e.g., Nicolini and Mengis, 2024; Splitter et al., 2024), showing how top managers pay attention to issues raised by peripheral actors according to the 'emotional volume' that is generated by the nature and frequency of their emotional expressions, demonstrating how (expressions of) emotion can guide top managers' attention. Third, we show that an additional element of structuring (inclusive) strategy formulation beyond the inclusion and exclusion of peripheral actors (Dobusch et al., 2019) is the mix of analog and digital spaces (Baptista et al., 2017; Morton et al., 2022) provided, to solicit and capture emotional expressions from which top managers can strategize.

2. Theoretical background

Traditionally, the task of strategy formulation has been understood as a rational analytical exercise undertaken by experienced, expert top managers (Chandler, 1962) or dedicated strategy professionals (e.g., Mintzberg, 1994; Whittington et al., 2011). However, it is increasingly understood to be a highly emotional activity (Huy, 1999; Hodgkinson and Healey, 2011) involving many peripheral actors (Hautz et al., 2017). Indeed, there has been a shift toward open strategy: "an openness in terms of inclusiveness, in other words the range of people involved in making strategy; and an openness in terms of transparency, both in the strategy formulation stage and, more commonly, in the communication of strategies once they are formulated" (Whittington et al., 2011, p.532).

Top managers now frequently involve 'peripheral' actors such as middle managers (Burgelman, 1991), consultants (Nordqvist and Melin, 2008; Jarzabkowski and Kaplan, 2015; Plotnikova et al., 2021), clients (Morton and Iglesias Ruiz, 2024), citizens (Vaara and Rantakari, 2024), and employees (Baptista et al., 2017; Splitter et al., 2024), as they undertake strategy work. The inclusion of peripheral actors can help top managers to better comprehend the external environment (Tripsas and Gavetti, 2000), and often helps with the generation of, and selection between, alternative directions and ideas (Dobusch et al., 2019; Plotnikova et al., 2021; Langenmayr et al., 2024). The evidence suggests that by including peripheral actors, top managers can develop strategies that enjoy higher levels of coherence (Lusiani and Langley, 2019) and commitment (Mantere and Vaara, 2008) which, subsequently, are easier to implement (Mintzberg, 1994).

2.1. How experiences of emotion can shape strategy formulation

Depending on how strategy is formulated, it may be more or less (mis)aligned with the goals and interests of the various actors involved (Cyert and Marc, 1963), triggering emotional responses. From this perspective, emotions are intrapersonal feeling states that result from a cognitive appraisal process in which actors evaluate the impact of perceived or imagined events (e.g., aims or goals of strategy) and the implications for their own goals and well-being (Scherer and Moors, 2019). People experience positive (negative) emotions when the perceived impact of events is beneficial (harmful) for their goals and well-being, with further appraisals—such as who is responsible, or whether the circumstances are likely to change—determining which specific emotion is experienced (Lazarus, 1991). Emotions are adaptive, in the sense that they prepare individuals to behave in a way that enhances their goals and well-being (Elfenbein, 2023) and can become shared at the group level through processes like identification and contagion (Menges and Kilduff, 2015).

Research suggests that when top managers experience positive emotion, they tend to be more open to novel ideas and directions,

which is advantageous when (re)formulating strategy (Healey and Hodgkinson, 2017; Raffaelli et al., 2019). Indeed, positive emotion has been linked to higher levels of creativity among top managers (Delgado-García and De La Fuente-Sabaté, 2010), and an increased likelihood of pursuing new strategic directions (Håkonsson et al., 2016). In contrast, when top managers experience negative emotions such as fear and anxiety, it can make them less willing and able to engage with strategic issues and prospects (Maitlis and Ozcelik, 2004; Vuori and Huy, 2022; Vuori and Tushman, 2024), as well as motivate defensive behaviors (and even withdrawal) from the strategy formulation process (e.g., Hodgkinson and Wright, 2002).

Fewer studies have focused on how peripheral actors' experienced emotions might affect strategy formulation, despite the increasingly prominent role they assume (e.g., Whittington et al., 2011). However—much like studies on top managers' experienced emotions—the literature suggests that the experience of positive emotions among peripheral actors is desirable and advantageous since it can enhance peripheral actors' legitimacy judgments of (Huy et al., 2014), and support for (Shin et al., 2012), newly formulated strategies. Indeed, positive emotions such as hope and excitement can motivate peripheral actors to promote and advocate for strategy to be formulated in a specific way (Huy, 2002), whereas negative emotions such as fear may distort communication between peripheral and core (i.e., top managers) actors, undermining how strategy might be formulated (e.g., Vuori and Huy, 2016).

Given the possibility that emotion may be (mal)adaptive for strategy formulation, there is an essential need for leaders to regulate both their own, and others', emotions (Huy, 2002; Healey and Hodgkinson, 2017). Recent work by Kouamé et al. (2022), for example, highlighted how leaders of a mission-oriented organization needed to maintain actors' emotional resonance with the strategy to ensure access to requisite resources. Emotion regulation has therefore become a crucial task for top managers, to ensure that adaptive states suitable for strategy formulation (and implementation) can be established (Huy, 1999; Hodgkinson and Healey, 2011). This underscores the need for top managers to attend to the emotional displays and expressions of peripheral actors, to understand their emotions as a precursor to managing them.

2.2. Emotional expressions in strategy formulation

Emotional expressions refer to the observable, (non)verbal displays that might communicate or signal internal emotional experiences, thoughts and motivations (Stephens et al., 2013; Vuori et al., 2018). Indeed, actors involved in strategy formulation might signal their internal feelings states through verbal or written words, facial expressions, bodily gestures, or a combination of these factors (Elfenbein, 2023), to observers, who may subsequently alter their behavior (Van Kleef, 2009, 2010). This highlights how emotion can manifest intrapersonally and directly shape strategy by affecting how strategic actors think and act, as well as interpersonally, where a strategic actor's thoughts and behavior are influenced by the observation of another actor's emotional expression. Whilst an individual's internally experienced emotion might correspond with their emotional displays or expressions, this is not guaranteed: sometimes, actors may express emotion inauthentically, because of societal or institutional expectations and rules (Menges and Kilduff, 2015). Within this study, we focus on emotion expressed through spoken and written word[1].

Within strategy formulation, emotional expressions have been shown to affect how top managers engage with strategic issues (Maitlis and Ozcelik, 2004) and how leaders and their teams share information during crises (Netz et al., 2020). Similarly, various studies have shown how top managers might use emotional expressions and displays to influence subordinates (Brundin and Melin, 2006), as well as other executives (Samra-Fredericks, 2003, 2004; Brundin and Nordqvist, 2008), during strategy-making. Indeed, the effectiveness of executive collaboration during strategy-making has also been linked to the emotions they display, with positive (negative) emotional displays enhancing (constraining) strategizing (Liu and Maitlis, 2014), Top managers might also be influenced by the emotional expressions of board members, whose intense displays of anger and happiness can shape top managers' strategic decisions (van den Oever and Shropshire, 2024). The importance of emotional expressions has also been signaled in family business scholarship (e.g., De Massis et al., 2023), where strategic decision quality is sometimes judged upon the emotions that family members feel and express (Brundin and Languilaire, 2023).

Although evident that top managers' emotional expressions can affect the formulation of strategy, we understand much less about how the emotional expressions of peripheral actors—such as middle managers, frontline employees, customers, and other members of an organization or community—might affect strategy formulation (see Brundin et al., 2022). This oversight is surprising: prior work shows these actors are frequently involved in strategy formulation (e.g., Burgelman, 1991; Rouleau, 2005; Dobusch et al., 2019; Morton, 2023; Langenmayr et al., 2024), and there is also evidence that the emotional expressions of peripheral actors can affect whether (and how) top managers engage with strategic issues (Maitlis and Ozcelik, 2004). Indeed, when top managers' strategic decisions violate peripheral actors' expectations, they may express emotion to signal their dissatisfaction (Feldman and Quick, 2009; Toubiana and Zietsma, 2017). Similarly, peripheral actors' emotional expressions can create inter-group conflict, which can hamper attempts to inclusively strategize (e.g., Lundgren-Henriksson and Sorsa, 2023). Being cognizant of such emotional expressions therefore seems important, given it might indicate the appropriateness of a given decision, and affect how strategy formulation unfolds.

Recently, there has been the suggestion that peripheral actors' emotional expressions might be a valuable source of information for top managers. In a study of a failed merger, Vuori et al. (2018) found that when peripheral actors suppressed their emotional expressions, top managers remained unaware of issues with the devised strategy, preventing effective coordination (cf. Stephens et al., 2013). Separately, conceptual work has encouraged managers to engage with, and be responsive to, the emotions of organizational

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[1] This decision was informed by limitations within our data set, which we explain and discuss in more depth within our methodology section.

actors (see Hodgkinson and Healey, 2011; Healey and Hodgkinson, 2017), to help facilitate strategic adaptation and change. Yet, it remains unclear whether and how top managers could engage with, capture, or use the emotional expressions of peripheral actors to help formulate an efficacious strategy, or to support strategic adaptation.

2.3. Managing peripheral actors' contributions during strategy formulation

Adjacent literature, which has examined how top managers contend with and use the contributions—i.e., emotional expressions—of peripheral actors during strategy formulation, may shed some light on this question. According to some strategic change scholars, the pluralistic nature of organizations (Denis et al., 2007) means that top managers must formulate strategy ambiguously to accommodate divergent views and perspectives (Abdallah and Langley, 2014). However, others have argued that top managers should establish consensus and agreement (Sorsa and Vaara, 2020). Creating shared meaning may require orchestration by leaders (Morton, 2023; Vaara and Rantakari, 2024), who can intermittently open and close the strategy process to peripheral actors' input, in order to make sense of contributions (Dobusch et al., 2019) and avoid information overload (Hautz et al., 2017). This body of work suggests top managers must be responsive to such contributions, but exactly how they might be responsive is unclear.

The literature on how upwards influence is achieved in organizations agrees that top managers respond to contributions that gain their attention (e.g., Nicolini and Mengis, 2024; Brielmaier and Friesl, 2023; Plotnikova et al., 2024). Gaining leaders' attention may depend on peripheral actors' discursive competence (Splitter et al., 2024) and the ability to use appropriate language and practices to convey ideas to leaders (Rouleau, 2005; Mantere and Vaara, 2008). Issue-selling scholarship, similarly, emphasizes how the framing of messages is crucial in gaining top managers' attention (Dutton et al., 2001; Ashford et al., 2017), although there is some contention over whether expressing emotion is necessary (e.g., Raffaelli et al., 2019; Lauche and Erez, 2023) or not. This reinforces the need to study and understand whether and how top managers engage with peripheral actors' emotional expressions: recent work suggests that emotion can be a mechanism for directing others' attention (e.g., Heaphy et al., 2022; Vuori, 2024).

Overall, it remains unclear how top managers might solicit and use peripheral actors' emotional expressions when formulating strategy. The growing prevalence of inclusive strategy processes means that peripheral actors have the opportunity and legitimacy to express emotion concerning strategy, and there is some evidence suggesting that these emotional expressions are a valuable source of information for top managers. Yet, the extant literature portrays managers as passive recipients of emotional expressions, despite calls for managers to be proactive in seeking out and engaging with peripheral actors' emotions during the strategy process (e.g., Hodgkinson and Healey, 2011; Healey and Hodgkinson, 2017). Moreover, there is theoretical ambiguity regarding whether peripheral actors ought to express issues emotionally to gain top managers' attention, or not. Accordingly, we set out to explain: 'How can top managers capture and use the emotional expressions of peripheral actors for strategy formulation?'
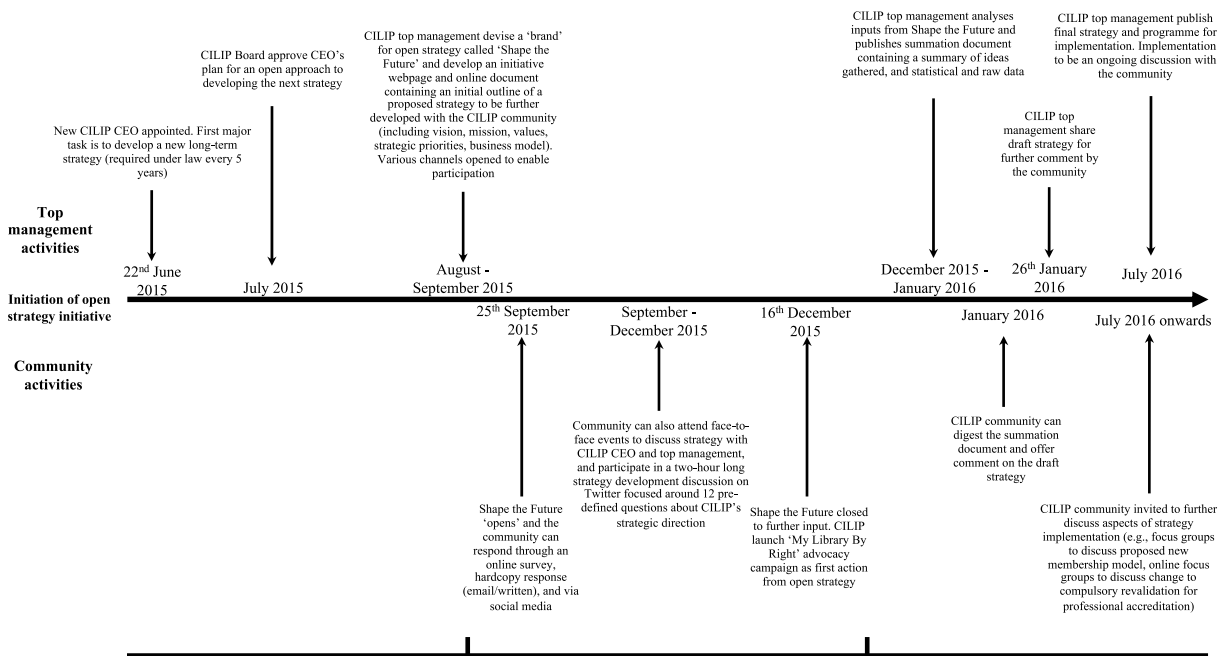

Fig. 1. Chronological timeline of strategy formulation at CILIP, showing top management and community involvement.

Table 1
Overview of data collected and use in analysis.

Data Source	Details	Use in Analysis
Semi-structured interviews (*int*)	30 interviews; 26 participants across top management and CILIP community	•Understand the nature of emotional expressions made by members of community •Understand how top managers used expressions of emotion throughout the strategy process •During validation phase, interviews offered insight into the emotional expressions made by the professional community relating to draft strategy (e.g., Massa et al., 2017). To identify how the collective expressed emotions, we looked for pronouns indicating the CILIP community (e.g., we said, they said)
Observation (*obs*)	6 full days observation; 78 A4 pages detailed notes, including informal conversations with top managers and members of the professional community	•Insight into actors' expressions of emotion during open strategy consultation events, captured in real-time. •Allowed us to observe the evolution of strategy over time, as top managers refined presentations and ideas based on feedback
Netnography (*net*)	1850 social media posts (1655 from Twitter)	•Identification of emotional expressions made by members of CILIP community using social media, captured in real-time
Survey (*sur*)	599 responses from CILIP's membership survey	•Identification of the professional community's expressions of emotion made via survey, captured in real-time
Archival Documentation (*doc*)	1042 pages of documentation, including strategy documents (draft and final), PowerPoint slides, board meeting minutes, newsletters, and summative reports from Shape the Future	•Provided background information (e.g., Membership data, previous strategic planning initiatives), which helped us become sensitized to the context •Helped with development of initial chronological timeline of events •Allowed us to trace evolution of strategy at CILIP, from the initial outline that top managers solicited feedback on, through the draft strategy and final implemented strategy. This helped us to understand how emotional expressions had shaped the contents of strategy at CILIP •Recorded board meetings minutes, agendas, as well as comments offered in relevant outputs by top managers, helped us to understand how they understood and responded to emotional expressions made by the community, and thus how expressed emotion had shaped the contents of strategy at CILIP

3. Methodology

3.1. Research setting

Our study is based on an inclusive strategy formulation initiative conducted by CILIP—a professional association for library and information professionals in the UK—between September 2015 and July 2016. As a professional association, CILIP is an organized body that guides and promotes the development of the library and information profession, providing social recognition, certification, development opportunities, and shaping what is 'appropriate' behavior for members and the wider community (Swan and Newell, 1995). The 'core' strategic actors at CILIP are the CEO and ten top managers, who are employed by CILIP to represent its members and community (i.e., 'peripheral actors') through setting and executing an appropriate strategic direction. The top management team's conduct is overseen by a board comprising 12 members. CILIP's peripheral actors comprise its operational managers and staff, who oversee operations, and its professional community of both members and non-members working in the information and library area. These actors share a common professional identity relating to the library and information profession, but come from a variety of backgrounds and areas, ranging from public, school, and academic libraries, health informatics, government information provision, knowledge management, cybersecurity, and information literacy, amongst others.

In encompassing multiple stakeholders with divergent interests, objectives, and power bases (e.g., Denis et al., 2007), strategy formulation at professional associations such as CILIP is hotly contested. Peripheral actors are likely to express emotion, depending on how (un)favorable the strategy is, given their own goals, interests, and objectives, which top managers must recognize and respond to because managers' purpose is to act in the best interests of peripheral actors. CILIP was therefore well-suited given the aim of our study, to understand how top managers might capture and use peripheral actors' emotional expressions when formulating strategy. This dynamic, where 'core' top managers manage the contributions and expectations of 'peripheral' actors when formulating strategy is also evident in other pluralistic settings, such as strategy formulation held between managers and diverse volunteer groups at Wikimedia (e.g., Dobusch et al., 2019), different staff groups at a University (e.g., Azad and Zablith, 2021), health and administrative professionals at a hospital (e.g., Lusiani and Langley, 2019), and a city administration and its citizens (e.g., Vaara and Rantakari, 2024). Given strategy formulation in these settings is inclusive and involves negotiation, consensus-building, and collaboration, we felt that our findings and insights would have analytical generalizability.

We followed an inclusive strategy formulation process at CILIP called 'Shape the Future' (see Fig. 1 for an overview), which launched in September 2015. In response to ongoing public funding cuts and austerity in the UK, CILIP's top managers sought to develop a new long-term strategy together with the organization's professional community. This aimed not only to address these

ongoing issues but also to manage the resultant widespread anger, frustration, and disillusionment that the organization faced from its community. For example, large sections of CILIP's community felt that its failure to advocate and assume leadership on key issues (e.g., protecting library jobs against ongoing austerity and public library closures), meant that CILIP had contributed to the threats that library and information professionals were now experiencing. Moreover, CILIP's paid membership offering was seen as poor value for money, failing to provide sufficient tangible benefits or continued professional development opportunities, which led to the organization's reputation being damaged and its performance declining. Indeed, membership—a primary source of income—had more than halved from 23,000 in 2002 to 13,000 in 2015, bringing CILIP's existence into question.

For Shape the Future, engagement and feedback were solicited from all members (upwards of 13,000), CILIP's staff base of around 50 employees, and those in the wider professional community such as professional interest groups and non- or former members. Having captured the views of over 1000 actors, the initiative ended in December 2015. In January 2016, CILIP's top managers shared a summative report, summarising the input from Shape the Future, and a draft strategy for further comment by the community, before a final version of the strategy was published in July 2016.

3.2. Data collection

Our data set consists of both primary and secondary qualitative data (Miles and Huberman, 1994) (see Table 1). We collected primary data in real-time through interviews with members of top management and members of the wider community, alongside naturally-occurring data in the form of netnography and observational data. Additionally, we amassed a significant body of archival data, allowing us to develop a fine-grained understanding of the inclusive strategy formulation process at CILIP, and the role of expressed emotions therein. Given the paucity of knowledge regarding how expressed emotion might shape the processes and outcomes of strategy formulation, the ability to combine primary and secondary data sources was valuable in comprehending the daily realities regarding this nascent topic area (Miles and Huberman, 1994).

We conducted 30 semi-structured interviews *(int)* with top managers and the professional community, in which we sought to understand their experiences of being included in strategy formulation. Interviews were conducted in two stages. Initially, we interviewed top managers to gain an understanding of CILIP's Shape the Future initiative. We later spoke to other CILIP employees with roles at varying levels of the organization, to gather insights following the initiative. Participants from top management included the CEO, Chair of the Board, Board Members, Head of CILIP Scotland, Head of CILIP Ireland, and other employees including development officers for member networks and employers. We also interviewed actors from CILIP's wider professional community, who would conventionally be considered peripheral actors who are not generally involved in strategy formulation (e.g., Mintzberg, 1994; Whittington et al., 2011). Informants were predominantly active CILIP members, including information and knowledge management consultants, academics, public, school, health, and academic librarians, registration service professionals, and information literacy experts. Our interviews lasted between 34 and 136 min in length, but on average lasted 63 min.

Our observational data *(obs)* primarily focused on a series of face-to-face discussion events but also included periods of observations at CILIP's headquarters in London. Permission was granted to attend these face-to-face events, where the CILIP CEO and other top managers discussed strategy with actors from across CILIP's regional network and interest groups. We combined traditional observations with the use of netnography *(net)*, which allowed us to observe and capture over 3000 posts from social media platforms (used by CILIP to communicate about Shape the Future/the new strategy, and by the professional community to share opinions and ideas for the ongoing strategy formulation process), which were narrowed to 251 insightful posts relating to (strategic) information sharing and discussion. Further, and most significant, was the separate collection of 1655 Tweets from an open, 2-h-long synchronous Twitter discussion between the CEO and the community, about twelve predefined questions regarding the formulation of CILIP's new strategy.

Finally, we gathered rich archival data, in particular the 599 available responses to an online survey *(sur)* that CILIP top management had developed and sent to the professional community as part of Shape the Future. We also obtained a range of documents *(doc)* relating to strategy formulation over time, including draft and final strategic plans, PowerPoint slides used for communicating the progress of strategy formulation, organizational newsletters, secondary interview media and transcripts with CILIP top management (e.g., those conducted by national radio stations, newspapers), board meeting minutes, and evidence of strategy implementation emerging from Shape the Future (e.g., new advocacy campaigns, a new membership model).

3.3. Data analysis

Although our data were collected in real-time, our analytical focus emerged after data collection had ceased (e.g., Huy, 2011). Our theoretical focus on the role of expressed emotion was driven by post-hoc reflections about the emotional nature of the process and unprompted comments offered by informants, which spurred the second author to query whether inclusive strategy formulation at CILIP had been shaped by emotion. Subsequent exploration revealed the prominence and significance of emotional expression, leading to a refined theoretical focus where we sought to identify the role played by peripheral actors' verbal and written expressions of emotion. Whilst our data captured these two dimensions of emotional expression, it had not been collected with this theoretical focus in mind, meaning it could not account for other dimensions (e.g., facial expressions, bodily gestures). Furthermore, although research has shown emotional expression might be inauthentic (e.g., Brundin and Melin, 2006), we treated the emotional expressions we identified as authentic, given their unprompted, naturally occurring nature, and the fact that we had no way of confidently discerning their authenticity, post hoc. We recognize that these two issues constitute important limitations of our data set and study, as addressed in our limitations section later. Our data analysis followed a three-step, interactive process (Strauss and Corbin 1998; Langley, 1999).

First, we developed a chronological timeline of key events, actors, and mediums (i.e., channels for communication) that shaped the

strategy formulation process at CILIP (see Fig. 1). We applied temporal bracketing (Langley, 1999) to decompose our data set into three periods, following the patterns of activity shaping inclusive strategy formulation at CILIP: preparing and planning, generating and formulating, and finalizing and implementing. This was consistent with recent work on inclusive strategy processes (e.g., Tavakoli et al., 2017; Dobusch et al., 2019; Morton, 2023).

Second, we developed a detailed understanding of the emotions experienced and expressed by the actors via different communication mediums used during strategy formulation. We built on data available via interviews, surveys, social media, observations, and documents to code and comprehend the emotional dynamics across the mediums, and as experienced by key actors over time. *Appendix 1* offers example coding and diagrams developed during the early stages of our analysis.

To identify and code emotion in our data, we began by conducting a preliminary pilot coding exercise to understand the broad existence of emotion during inclusive strategy formulation at CILIP. We followed precedents set by others publishing strategy research in top journals (e.g., Huy, 2011; Vuori and Huy, 2022) by using appraisal theory (see Scherer and Moors, 2019) to identify instances of emotion in our data. In such studies, scholars have coded and verified explicit instances of emotion (e.g., "I am outraged") according to critical appraisal dimensions associated with specific discrete emotions. They have also used appraisal dimensions as a means to access more implicit instances of emotion. Our coding revealed that emotional expressions and statements were particularly prevalent in our observational, netnography, and archival data. Given the paucity of research on this topic in existing literature (see Brundin et al., 2022), we refined our analytical focus to purely expressions of emotion.

We adopted a pluralistic approach to coding expressions of emotion (Kouamé and Liu, 2021) in our data (see *Appendix 2*), where we primarily used appraisal theory (Scherer and Moors, 2019) to identify emotions, complemented by the circumplex model (Russell and Feldman-Barrett, 1999). Whilst it was relatively straightforward to identify explicit expressions of anger (e.g., "So angry at CILIP!"), and verify them using key appraisal dimensions, we found that appraisal dimensions and the 'core relational theme' proposed for each basic emotion in appraisal theory (Lazarus, 1991) was a useful tool to help identify and code more implicit instances of emotion. For instance, the core relational theme of anxiety is a sense of existential threat or danger, and low or uncertain coping potential, so when the professional community conveyed a sense of threat, and an unknown capacity to cope, we could code this as anxiety.

Despite being a useful basis to code from, a shortcoming of appraisal theory is that it offers limited nuance in emotion, such as their varying levels of arousal. This motivated us to consider the circumplex model, which maps emotion according to two dimensions: valence (i.e., pleasant/unpleasant) and activation/intensity (i.e., high/low). Having identified emotions using appraisal theory, we could then nuance expressions of emotion in our data—such as anger and fear—according to this level of arousal. For instance, this allowed us to distinguish between concern and worry, anxiety, as well as fear and terror, which are emotions triggered by a sense of threat or danger.

Given we drew on netnography data such as social media posts, we also consulted papers that examined expressions of emotion on digital mediums (e.g., Toubiana and Zietsma, 2017; Waterloo et al., 2018), to ensure we did not miss key indicators of expressed emotion. This alerted us to how punctuation, such as exclamation marks, question marks, and capitalization, could be possible indicators of emotional expressions, which we incorporated into our coding guide (*Appendix 2*).

Third, we started developing open coding (Strauss and Corbin, 1998) of the actors' expressions of emotion in each of the periods. We included the eliciting stimulus or 'target' (Elfenbein, 2023) of these expressions when coding, to understand the key emotive issues at CILIP (e.g., actors expressed anger about attempted name change) and provide an avenue for linking emotive issues to changes in strategy. Top managers had been asked during interviews how actors' inputs were being used and acted upon, and their responses to these questions offered insight into how they responded to emotionally evocative issues, with top managers explaining how the formulated strategy should be a direct response to actors' "concerns and interests" (*int*, TM).

Specifically, top managers outlined how they had sought to understand expressions of anger and fear, and subsequently address them through aspects of the strategy such as the strategic priorities (and/or their enablers) and strategic programs. Equally, top managers explained how they had understood and responded to actors' expressions of positive emotions (e.g., hope, interest, happiness) when making decisions about CILIP's strategy as an indication that they had their seal of approval, or that such expressions were an indicator of approval to move forwards with proposed actions. We therefore began to discern the different effects of actors' expressions of emotions according to their valence (i.e., whether they were pleasant, positive emotions, or negative, unpleasant emotions). This suggested that positive emotions were perceived as indicators of support for the contents of the strategy, whereas negative emotions indicated problems within strategy that required consideration and addressing. Alternatively, they could indicate issues that actors wanted to see top managers prioritize.

We then engaged in axial coding (Strauss and Corbin, 1998) to understand how exactly actors' emotional expressions translated into inclusive strategy formulation. We used archival documents, specifically the agendas, minutes, and actions from CILIP board meetings to understand the context and action-interaction of the developed open coding categories. These documents were particularly useful, because the recorded minutes often detailed how and why decisions had been taken, providing further insight into how top managers responded to expressions of emotion. Additionally, we used interviews held after the Shape the Future initiative, during which they outlined their thoughts and perspectives on how the community's input to the strategy formulation process had shaped the outcome. Throughout this process, we followed Strauss and Corbin's (1998) recommendations of intensively recording memos and diagrams of our ideas.

Finally, we relied on selective coding (Strauss and Corbin, 1998) to develop a model showing how top managers capture and use peripheral actors' expressions of emotion to help formulate strategy. To do so, we linked the axial coding categories to the outcomes and stages of strategy formulation into overarching theory (Strauss and Corbin, 1998). We used tables to break down the strategy into its vision and mission (later the 'unifying objective'), its strategic priorities, enablers, and associated programs to follow its evolution. With an understanding of the changing nature of strategy as well as what actors expressed emotion about, we sought to connect the

two. Initial insights were generated using spider diagrams that connected the emotions that were expressed, the issue they were concerned with, and whether this issue was reflected in any of the aspects of strategy. We also calculated the number of expressions of emotion throughout the process (by medium where possible), to see whether the affordances of the communication channels differed in eliciting/capturing such expressions (Table 2, Table 3a, Table 4, Table 5a; see also Appendix 3 and Appendix 5).

As we began to refine our conceptual model, a critical question was why top managers had responded to certain emotional expressions, but not others. As we considered which issues were (not) attended to, it seemed that top managers had paid attention to issues that were repeatedly raised using emotions, and/or through particularly 'intense' or 'activated' expressions of emotion (e.g., anger, fear). We developed a rating system to determine the 'emotional volume' of issues, which took into account the valence of the emotional expression (positive/negative) and its level of activation based on a score of 1 (low) to 6 (high) according to where the emotion was situated on the twelve-point circumplex model (see Netz et al., 2020), as well as how frequently that issue had been expressed using that emotion (see Tables 3a and 5a; Appendix 3 and Appendix 5). We could then determine the overall 'emotional volume' that a given issue had generated, considering the different ways it had been emotionally expressed and how frequently these emotional expressions were made. Doing so allowed us to see that the issues that top managers at CILIP addressed were those that had high emotional volume scores. Emotional volume therefore became an important concept within our conceptual model, helping to explain which emotional expressions top managers paid attention to and acted upon when formulating strategy. This gave us insights into how expressed emotion may have shaped the contents of the strategy at CILIP (see Fig. 3).

Our analysis focused on a core category—peripheral actors' emotional expressions during strategy formulation—and related it with the other categories from axial coding, from which we created our conceptual model. This model elaborates the three key processes in response to our research question regarding how top managers capture and use the emotional expressions of peripheral actors for strategy formulation—'emotion processing'—as well as two factors that made these emotional expressions salient to top managers. First, we found how top managers sought to *canvass* peripheral actors' expressions of emotion, by outlining their strategy intentions and creating spaces in which emotion could be expressed. Next, top managers *harnessed* a specter of peripheral actors' diverse emotions using various (digital and analog) communication mediums; finally, we saw top managers integrating peripheral actors' expressions of emotion into their strategic decision-making, to guide the formulation of strategy, depending on the emotional volume generated by peripheral actors as they expressed strategic issues.

4. Findings

Our findings show how top managers can capture and use peripheral actors' expressions of emotion to help formulate strategy through emotion processing. This process is triggered by the existence of emotional tumult among peripheral actors, which can create a need for top managers to reassess the organization's strategy. Subsequently, top managers engage in emotion processing through three interrelated practices—canvassing, harnessing, and integrating (see Fig. 2 for a visual representation)—to understand and address this tumult through strategy formulation. The following findings describe how top managers adopted these processes during two phases of strategy formulation at CILIP. At the end of Phase 1, top managers sought further confirmation from the community, thus sharing a draft strategy with them (i.e., outlining their new strategic intentions) and restarting the process as they returned to canvassing (feedback arrow from Formulating Strategy to B1 in Fig. 2). At the end of Phase 2, top managers began to implement the formulated strategy.

4.1. Phase 1: Initial strategy consultation

4.1.1. Recognizing emotional tumult towards strategy

A common sentiment existed among CILIP's professional community, that the organization had failed to promote "the importance of the library, information and knowledge management community" (*doc),* which had contributed to the emergence of threats such as "de-professionalization" and "amateurization" in the library and information professional sectors (*doc*). This had led to many "vocal spats over the last few years" (*int*, TM), during which "there had been so much anger directed at CILIP" (*int*, TM) by its community. Such emotional tumult among peripheral actors (*A1*) meant that CILIP had become "defined by this negative space" (*int*, TM).

As a consequence, CILIP faced plummeting membership numbers, which had almost halved from 23,000 to 13,000 between 2002 and 2015 (*doc*) alone. The loss of members in such numbers presented an existential threat to the organization and its ongoing existence, given that 36% of CILIP's income in 2015 came from membership fees (*doc*). Given the need to reassess the extant strategy

Table 2
Emotional expressions by different mediums during Phase 1.

|	Medium			
	Survey	*Social Media*	*Face-to-Face Consultation Events*	*Total*
Total Comments/Contributions	**2400**	**1404**	**N/A**	**-**
Total Number of Emotional Expressions	**97**	**257**	**54**	**408**
As % of Total Comments	**4%**	**18.3%**	**-**	**-**
Number of +ve Emotional Expressions	30	53	23	106
Expressions of +ve Emotion as % of Total Expressions of Emotion	*31%*	*20.6%*	*42.6%*	*26%*
Number of -ve Emotional Expressions	67	204	31	302
Expressions of -ve Emotion as % of Total Expressions of Emotion	*69%*	*79.4%*	*57.4%*	*74%*
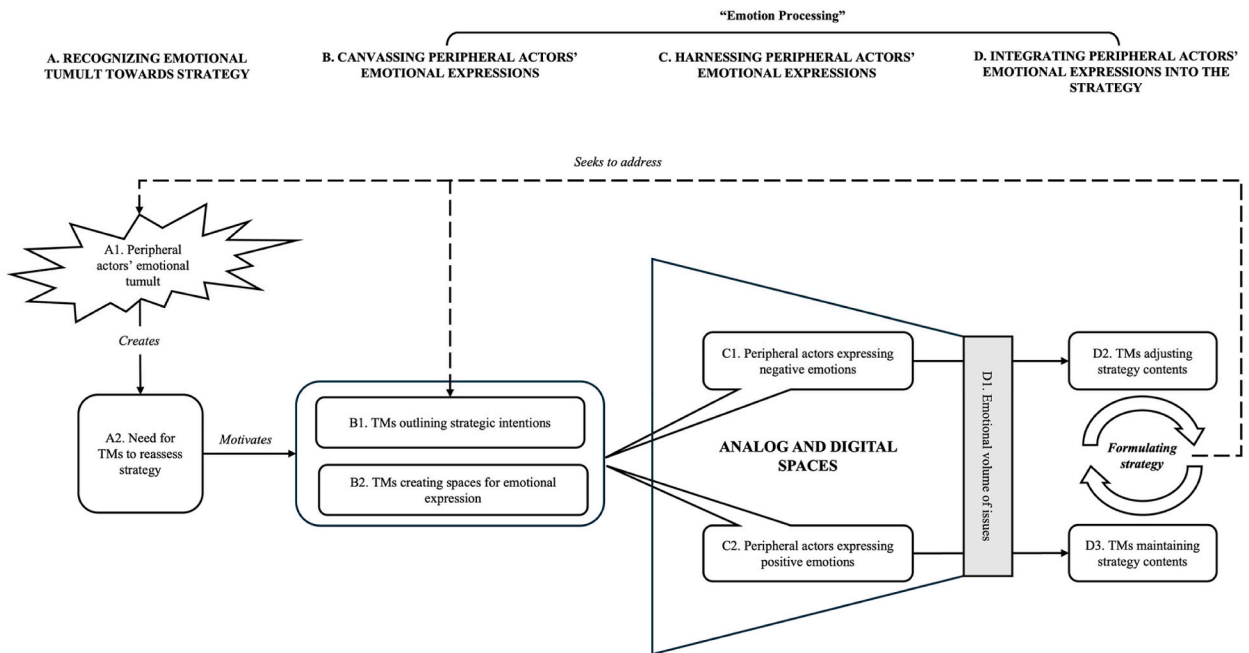
Fig. 2. Conceptual model of top managers' emotion processing showing how they can capture and use the emotional expressions of peripheral actors during inclusive strategy formulation.

(*A2*), top managers outlined their intention to "talk to our whole community … about their hopes and expectations" (*int*, TM). The "need to keep … members" (*int*, C) was evident, and therefore to "keep them happy" (*int*, TM), top managers sought to "create a common cause" (*int*, TM) that could bring the organization and its community together.

4.1.2. Canvassing peripheral actors' emotional expressions

Top managers set out to formulate CILIP's strategy using a more "participatory approach" (*int,* TM) which involved soliciting and understanding the community's feelings and sentiments towards the proposed direction. The "need to open up more" (*obs*, TM) was ostensive to top managers, given the "fractitious history" (*int*, C) that existed between the organization and its wider community. Therefore, "rather than dictate" (*int*, C) to the membership that "this is definitely the direction that we're going in" (*int*, TM), their input was sought, instead of risking "choosing the wrong hill, or annoying people or leading them the wrong way" (*int,* TM).

Based on their existing interpretations of CILIP's situation, top managers developed documents that outlined the proposed strategic decisions and direction that CILIP would take over the next strategy cycle of five years (*doc*). Outlining their strategic intentions (*B1*) was an important precursor to soliciting the community's feelings, "because you have to give people something to discuss. You can't just have a consultation meeting and get people to sit down and say 'right, now what do you think?'" (*int*, TM). These strategic intentions were subsequently disseminated amongst the community using social media platforms, webpages, blogs, emails, and posters (*doc*).

To "respond … emotionally" (*int,* TM), top managers also needed to engage the community and understand the basis of their emotions. Top managers therefore began establishing spaces where the community could express their emotions concerning the outlined strategic intentions (*B2*), producing a "methodology for engaging key stakeholders and soliciting their views" (*doc*). Given that "with any consultation activity there are almost stages of bereavement … fear, anger, grief, denial … you get walls of different reactions to things" (*int*, TM), top managers were keen to ensure that the community's full range of emotions were "heard, responded to, and engaged with" (*int*, TM). Furthermore, aware that it could be "intimidating" (*int*, TM) to share authentic thoughts and feelings on strategy, a "combination … and range" (*int*, TM) of approaches were devised to engage the community. These included analog communication mediums including face-to-face discussion events, alongside digital communication mediums consisting of an online survey and social media channels and chats.

Having a mix of spaces where the community could share their feelings was important. Top managers explained that "it was easier to … talk to [people] about the consultation and the priorities and organization" (*int*, TM) face-to-face, whilst also describing how "there [was] no better way to hold an ongoing dialogue with large, distributed groups of people" (*int*, TM) than using social media platforms like Twitter. Synchronous dialogue also made it easier to "get that two-way conversation going" (*int*, TM). The anonymous online survey, in comparison, helped elicit authentic feelings from those "in jobs where they can't talk about their jobs … otherwise they get in trouble" (*int*, TM), as well as getting "people who were nervous or shy" (*int*, TM) about contributing involved. Top managers recognized that "what might be comfortable for some … members, such as social media, for other members … they maybe don't use social media" (*int*, TM) and that different spaces would hopefully help to "open up a discussion so that people got a real opportunity to

Table 3a

Breakdown of most prominent emotional expression[2] and calculation of issue emotional volume in Phase 1: Initial consultation.

Emotion expressed	Overall number of expressions	Breakdown of emotional expression by issue and calculation of associated emotional volume						
		Emotion rating[a]	Issue	Number of emotional expressions				Emotional volume of issue[b]
				Survey	Social Media	Face-to-face	Total	
Anger	126	−6	*Advocacy*	6	64	3	73	−438
			Cost/value of membership	3	34	2	39	−234
			Top management listening to members	–	7	–	7	−42
			London-centricity	–	3	–	3	−18
			Mandatory chartership	–	1	–	1	−6
			Identity of organization	–	–	1	1	−6
			Rhetoric around public libraries	–	–	1	1	−6
			Towards government, for austerity	–	–	1	1	−6
Anxiety	10	−4	*Threat to profession/identity*	–	4	–	4	−16
			Mandatory chartership	–	3	–	3	−12
			Absence of data management	1	–	–	1	−4
			Dwindling membership	1	–	1	2	−8
Concern Worry	17	−3	*Narrow focus of proposed values and actions*	1	–	–	1	−3
			Threat to profession/identity	1	–	3	4	−12
			Cost/value of membership	1	–	–	1	−3
			State of membership	1	–	4	5	−15
			Members' engagement in strategy consultation	–	–	3	3	−9
			Whether CILIP represent profession	–	–	1	1	−3
			Will action/change actually occur?	1	–	1	2	−6
Fear	10	−6	*Future of profession/ professional identity*	3	–	–	3	−18
			Too late to act	3	–	–	3	−18
			Representative of profession	2	–	–	2	−12
			Emerging threats	2	–	–	2	−12
Frustration	104	−5	*Advocacy*	7	46	3	56	−280
			Proposed values	9	–	–	9	−45
			Cost/value of membership	7	8	–	15	−75
			Ability to engage members	1	–	–	1	−5
			Identity	–	4	–	4	−20
			London-centricity	4	4	–	8	−40
			Over-emphasis on public libraries	5	–	–	5	−25
			Time taken for TMs to act	2	–	2	4	−20
			State of public libraries	–	–	1	1	−5
			Use of Twitter	–	–	1	1	−5
Sadness	27	−2	*No support/advocacy*	–	23	–	23	−46
			Loss of career/professional identity	1	2	–	3	−6
			Feeling forgotten	–	1	–	1	−2
Gratitude	44	3	*Participation*	11	31	1	43	126
			Multiple modes of engagement	1	–	–	1	3
Hope	14	4	*Better future*	8	–	1	9	36
			Continued engagement	1	–	–	1	4
			More advocacy/support	–	–	4	4	16
Interest	34	5	*Hearing others' opinions*	–	7	2	9	45
			Revalidation vote	–	–	4	4	20
			Top managers' focus	–	–	2	2	10
			How to better engage membership	1	–	4	5	25
			New strategy	–	4	–	4	20
			Involvement/participation	–	9	1	10	50

[a] Emotion rating = Valence x Arousal. Arousal is calculated, based on the 12-point circumplex model of emotion, as a rating between 1 (low) to 6 (high). Valence reflected as positive emotions given + ve scores, whilst negative emotions given -ve scores (e.g., −1, −2, etc.).

[b] Emotion volume of issue calculated by combining emotion rating (see above) with the total number of emotional expressions regarding a given target/object. Negative score reflects an issue that has been expressed in terms of negative emotions.

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[2] In the interest of saving space, we present only data relating to emotions expressed >10. For a detailed breakdown of all emotional expressions, see Appendix 3.

contribute" (*int*, TM). The CEO also made it clear they were "not afraid of criticism" (*int*, TM) and made themselves "very accessible" (*int*, TM) through both analog and digital spaces, to try and encourage the community to openly discuss their feelings. "In the past" this lack of openness had "been one of the stumbling blocks … in hearing members views and listening" (*int*, TM) to their feelings, and therefore was seen as crucial to facilitating expressions of emotion towards the proposed strategic intentions of top management.

4.1.3. Harnessing peripheral actors' emotional expressions

Using these different spaces, CILIP's community began expressing their emotions concerning the outlined strategic intentions, which were largely negative (302 negative emotional expressions; 106 positive emotional expressions). Indeed, negative expressions of emotion (*C1*) constituted 74% of total emotional expressions identified during discussions with the professional community (see Tables 2 and 3a for an overview). Anger (n = 126) and frustration (n = 104) were the most commonly expressed negative emotions. In contrast, gratitude (n = 44) and interest (n = 34) were the most frequently expressed positive emotions by the community (*C2*).

The community expressed varying intensities of fear, which largely stemmed from the perception of existential threats to their jobs and careers. For instance, there were expressions of "**concern** in the academic sector with many LIS courses closing down" (*sur*, C), whilst others voiced anxiety at the possibility of losing status as a consequence of de-professionalization, explaining that they were "Chartered and don't want to lose that: (#uklibchat" (*net*, C). Indeed, the community expressed that "they are under threat of redundancy, to be replaced by volunteers. [Yet] none of the staff are allowed to speak to the public … that's **horrifying**" (*int*, C). More generally, they expressed being "**horrified**" (*sur*, C) at the threats posed by the entry of private firms like Barclays Bank into information provision and services ('Digital Eagles') (*doc*). This led the community to "**worry** deeply about the future of CILIP … does it represent the profession?" (*sur*, C) given they seemed to be doing little to address such existential threats.

The community subsequently expressed how they were "**angry**" (*sur*, C) and "**furious**" (*sur*, C) at CILIP, deeming many ongoing threats as being caused by CILIP's (in)action. For example, there was frustration at CILIP's failure to advocate politically for the profession, with the community patronizing them by stating: "Start by listening to the membership. We said "*actively oppose*" in the AGM resolution so go ahead: do it!" (*net*, C). Expressions of frustration also concerned how CILIP's advocacy efforts seemed to only apply to a small aspect of the community: "Why "stand up" for public libraries? Why not "support all libraries and emphasize their importance to society"?" (*sur*, C). Anger was also expressed towards the cost of membership: "Over £100 per person is NOT affordable #uklibchat" (*net*, C), as well as CILIP's perceived openness to de-professionalization: "NO! It [chartership] needs to be the equal amount of work for everyone to get the MSc" (*net*, C). Top managers corroborated these expressions of anger and frustration, stating in a report delivered to CILIP's executive board that: "People are deeply **frustrated** with CILIP's perceived inaction in response both to public library closures and our failure to engage with the outcomes of previous consultative processes" (*doc*).

Yet, the community also expressed some positive emotions towards the inclusive approach to strategy formulation and top management's proposed strategic intentions. Numerous members of the community expressed gratitude concerning their inclusion in strategy formulation, making statements such as "**thank you** very much for consulting with members about these issues" (*sur*, C) and "**thank you** for allowing members to be involved in the process via this questionnaire." (*sur*, C). Again, top managers corroborated such expressions, describing how the community "**appreciate** the feedback" (*int*, TM), in terms of understanding the intended future direction for CILIP. The community's inclusion in strategy formulation—and the improved relationship they subsequently enjoyed with top managers—also triggered expressions of pleasure, as many in the CILIP community described being "very **pleased** to be able to contribute" (*sur*, C) and "really **pleased** that CILIP is moving towards a more open and consultative model of interaction with its members" (*sur*, C).

On the back of the improved strategy and relationship, there were also expressions of "**hope** for the future of the profession" (*sur*, C) given "some good changes in attitude recently" (*sur*, C), referencing top managers more actively listening to their thoughts and feelings. The more active role of the community in strategy formulation also evoked expressions of "**hope** [that] this … will be followed up with other forms of engagement" (*sur*, C).

4.1.4. Integrating the community's expressions of emotion

Upon concluding the consultation with the community, top managers began consolidating their contributions and formulating the new strategy, paying particular attention to issues that had accumulated sufficient emotional volume (*D1* – see Table 3b and Fig. 3). During this process, the community's expressions of emotion provided information concerning the efficacy of their outlined strategic intentions. Negative expressions of emotions provided top managers with "really rich knowledge about what people are concerned about, [and] where they want … to go next" (*int*, TM), signaling to top managers where the content of strategy needed to be adjusted, or perhaps indicating which outlined intentions were a priority requiring immediate attention (*D2*).

For example, CILIP's (lack of) advocacy accumulated the most significant emotional volume, through expressions of anger (n = 73) and frustration (n = 56). This meant that "advocacy was the top priority" (*int*, TM) to come out of the consultation. Top managers explained that these expressions "came across very strongly" (*int*, TM) and indicated that the community was "saying that advocacy is important" (*int*, TM). The new strategy was therefore developed in draft form "so CILIP [had] a strong focus on advocacy" (*int*, TM). Similarly, top managers planned a further consultation with the professional community on redeveloping CILIP's membership model, given this also accumulated notable emotional volume through expressions of frustration around this issue (n = 15). Considering that "it's a massive business risk to create a fundamentally different membership model" (*int*, TM), top managers explained that these emotional expressions had "given the board the comfort that they were looking for to say it's worth taking that risk because there's no merit just sitting on a declining membership model over the next 10 years." (*int*, TM).

In comparison, positive expressions of emotion were an indicator to top managers "confirming that [the community] are **happy** to … press on" (*obs*, TM) and therefore a sign of approval for, and a need to maintain, top management's existing strategic intentions
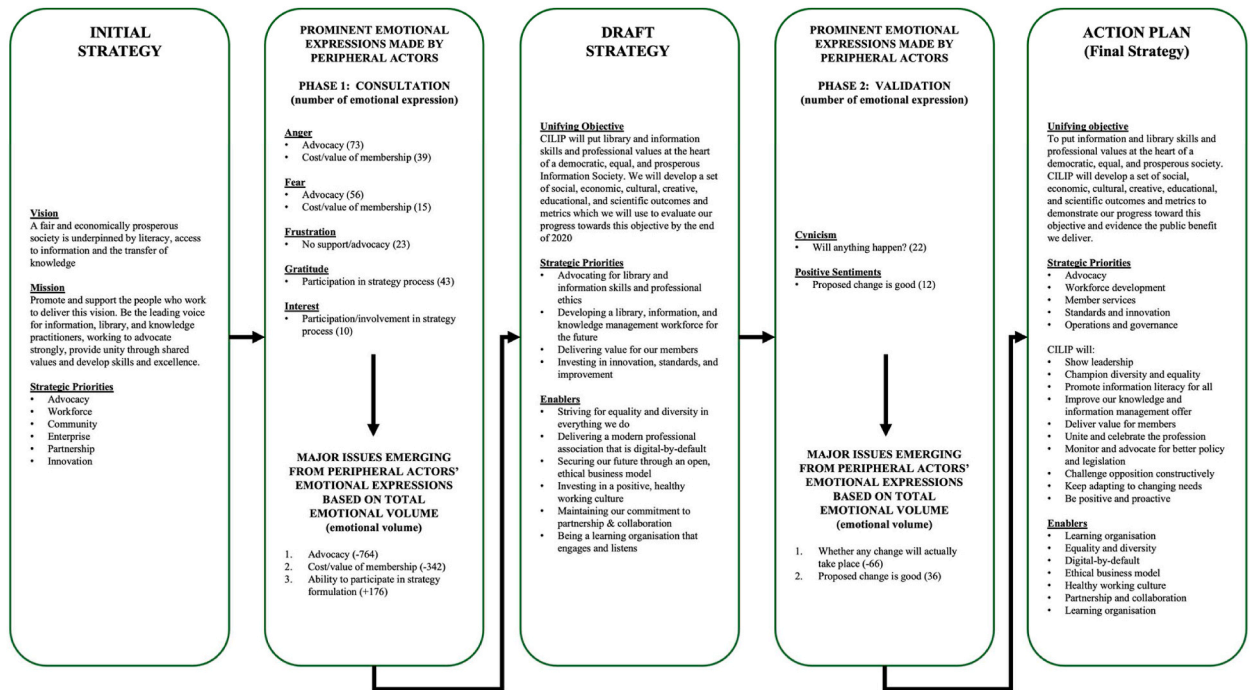
Fig. 3. Evolution of strategy over time, as shaped by peripheral actors' expressions of emotion during inclusive strategy formulation at CILIP.

Table 3b
Major issues emerging from peripheral actors' emotional expressions based on total emotional volume (Phase 1).

Issue raised by peripheral actors	Emotion used to express	Emotion rating	Number of times emotion used to express issue	Emotional volume (Emotion Rating x Number of Expressions)	Total emotional volume of issue
Advocacy	Anger	−6	73	−438	−764/+16
	Fear	−6	56	−280	
	Frustration	−5	23	−46	
	Hope	4	4	16	
Cost/value of membership	Anger	−6	39	−234	−342
	Concern/Worry	−3	1	−3	
	Fear	−6	15	−75	
Ability to participate in strategy formulation	Gratitude	3	43	126	176
	Interest	5	10	50	

(*D3*). The move towards an inclusive approach to strategy formulation accumulated sufficient emotional volume through positive emotions of gratitude (n = 43), with numerous members telling top managers "**thank you** … for consulting with members about these issues. [We] welcome all the work that CILIP is undertaking on behalf of members" (*sur*, C). Therefore, top managers ensured this commitment to becoming a "genuinely open" organization (*int*, TM), outlining how CILIP would be a "learning" and "collaborative" organization in strategy documentation (*doc*). Indeed, top managers explained that the strategic intentions had "got a lot of optimism" (*int*, TM) from the community, which they interpreted as broad support from the professional community for CILIP's new direction.

4.2. Phase 2: Validation of draft strategy

4.2.1. D to B. Canvassing peripheral actor's emotional expressions (towards draft strategy)

Top managers subsequently sought to leverage the spaces for emotional expression that had been created to validate the newly formulated strategy with the community. This restarted the overall process, as top managers (re)outlined their strategic intentions (*B1*) using a 'summative report' (*doc*) which provided an overview of the draft strategy, as well as the key data and statistics (e.g., number of responses, full survey data) used during strategy formulation. Sharing these documents with the community enabled top managers to go "back and … have a second round of meetings with [the community] to say, 'this is where we're going'" (*int*, TM). These meetings would allow the community to say "'yes that's what I meant' or … 'no, you've misunderstood'" (*int*, TM). Top managers sought further expressions of emotion from the community to get "confirmation from members about … their priorities" (*int*, TM), as well as "to provide the members with assurance that [top management] were listening to what they were saying" (*int*, TM).

4.2.2. Harnessing peripheral actor's emotional expressions (towards draft strategy)

The community again expressed their feelings concerning CILIP's proposed strategic direction. There was a decided uptick in positive expressions of emotion (*C2*), which now constituted 34.4% of total expressions of emotion compared to 26% previously (for more detail, see Tables 4 and 5a). The community expressed being "**happy** to be involved" (*int*, C) and "**pleased** to be included" (*int*, C) in strategy formulation, with top managers noting how the inclusion of the community seemed to have helped "achieve a **happier** membership" (*int*, TM). Indeed, there was generally "lots of **optimism**" (*int*, TM) being expressed by parts of the community towards CILIP's proposed strategy and direction, who were "very **excited** to see how it all turns out" (*int*, C) and "quite **surprised**" in a positive sense "that [the strategy] has moved on as much as it had" (*int*, C).

The movement towards inclusive strategy formulation was deemed a success, with top managers describing how "the feedback we [top managers] get is that the members **appreciate** that face-to-face talk" (*int*, TM) since the outputs better reflected their needs. Moreover, it had helped to ensure that parts of CILIP's professional community who previously had felt ignored were more centrally recognized, with gratitude being expressed at having better representation. For example, information professionals expressed being "**pleased** that the economic and social and political value of an information society … [was] mentioned" (*int*, C) in the draft strategy.

In this respect, "the word [top managers got] the most often [was] **hope**" with the community describing "that they have a **sense of hope** that we will be better" (*int*, TM). Such hope signaled the efficacy of the new strategy, a stark turnaround given assertions that previously "people had abandoned **hope** in CILIP" (*int*, TM). Indeed, CILIP's community liked the new inclusive approach to strategy formulation, expressing "**hope** it [inclusively formulated strategy] will continue" (*int*, C) in the future.

Yet, 65.5% of the community's expressions of emotion were still negative (*C1*). For instance, there were still expressions of frustration and anger from the community, asking "where has CILIP been for the last three or four years?" (*int, C*), reflecting a sense that:

"You can't not help but feel had we embraced the opportunity that libraries presented a few years ago, we might not be in that situation today, who knows? Clearly CILIP do have a responsibility for that, should they have done it sooner? Yes, it should have! Austerity hasn't just happened has it, it's been going on for the last eight years or so, and we've almost waited until we've come to a crunch point before we've done anything." (int, C).

Interestingly, the expressions of negative emotion were less about the content of the draft strategy, as opposed to whether it would materialize or not (i.e., be implemented). Amongst the membership, "there [were] a lot of **cynics** saying nothing would ever come of [the draft strategy], nothing would ever happen" (*int*, C), and although members "welcome what was happening, [they were] still pretty **skeptical** about what the outcomes [would] be" (*int*, C) from Shape the Future. Indeed, people were "**skeptical** about [CILIP] anyway" (*int*, C). Historically, top managers had claimed change was on its way but failed to deliver on their promises, creating a "constant ingrained **cynicism** of the motivations of CILIP" (*int*, C). Many quarters of the community were cynical about whether top managers were genuinely taking their input onboard, or whether this was simply a performance:

"The strategy is half decided anyway. This [Shape the Future] is to get rid of the most grievous errors, and to affront people's pride about certain things" (*int*, C)

Despite the progress made in formulating the strategy inclusively—which was welcomed by the community, as evidenced by their expressions of positive emotion about this approach—there was still healthy uncertainty about the translation of the draft strategy into action. Until this happened, the community's historical 'scars' and memories meant they were not entirely convinced, and their expressed positivity remained tempered.

4.2.3. Integrating peripheral actors' emotional expressions into the strategy

The community's emotions provided top managers with "a pretty clear steer" (*int*, TM) on CILIP's proposed strategic direction. Top managers were therefore again able to draw on the community's expressions of emotion to help refine the draft strategy and create a finalized version. Top managers described expressions of negative emotion as "constructive criticism" (*doc*) which helped to indicate where either change or "an active response to the concerns people raise" (*int*, TM) was required (*D2*). It was crucial for such "discontents … to be heard" so that top managers could then try and "turn a threat into an opportunity" (*int*, C).

For example, sufficient emotional volume (*D1*; see Table 5b and Appendix 5) was established through the community's expressed cynicism concerning whether CILIP would enact the draft strategy (n = 22). This was "one of the reasons … [why top managers] set out the Gantt chart" (*int*, TM) in the finalized strategy. The Gantt chart was intended to help the community "see the direction that the organization will prioritize and take place over the next few years" (*int*, TM), which they could track using the monthly Update magazine, where top managers would regularly report on the progress made against these objectives (*doc*). Top managers even "changed [the name of the strategy] to an action plan" (*int*, TM) in a further bid to demonstrate their intention to enact suggestions from the community. Similarly, top managers outlined how "CILIP will have a strong focus on advocacy, and it will undertake a certain

Table 4
Emotional expressions made during Phase 2: Validation.

	Total
Total number of Emotional Expressions	90
Number of +ve Emotional Expressions	31
Expressions of +ve Emotion as % of Total Emotional Expressions	*34.5%*
Number of -ve Emotional Expressions	59
Expressions of -ve Emotion as % of Total Emotional Expressions	*65.5%*

Table 5a

Breakdown of most prominent emotional expression and calculation of issue emotional volume in Phase 2: Validation.

Emotion expressed	Overall number of expressions	Breakdown of emotional expression by issue and calculation of associated emotional volume			
		Emotion rating	Target	Number of expressions	Emotional volume of issue
Frustration	13	−5	*Continual attempts to change strategy*	*1*	*−5*
			Speed of change	*1*	*−5*
			Demise of profession	*5*	*−25*
			CILIP not representing community	*6*	*−30*
Cynicism	26	−3	*Whether anything will happen*	*22*	*−66*
			Whether consultation was legitimate, or whether strategy already decided	*4*	*−12*
Positive sentiments	12	3	*Proposed change is good*	*12*	*36*

number of campaigns and promotions each year" (*int*, TM) in response to the expressions of anger and frustration concerning the lack of advocacy, which indicated that "advocacy is clearly very important" (*int*, TM) to the CILIP community. Additionally, although expressions of negative emotion signaled "dissatisfaction with the membership model and a perception that CILIP neither engages nor advocates for the profession enough" (*int*, TM), the fact that parts of the community "freaked out … [made it] really clear that they needed time" (*int*, TM) leading to plans for concrete discussions with the community regarding membership to be held in the future.

The community's expressions of positive emotion towards aspects of the strategy, conversely, indicated that the strategy content was "positively received" (*doc*) by the community. It indicated the community's approval, and for top managers to maintain such aspects of the strategy content (*D3*). Top managers described getting "a lot of optimism … that now is the time for change … [and] including everyone in shaping the strategy" (*int*, TM). Sufficient emotional volume was generated by the community, who expressed positive sentiments indicating that "the openness was welcomed" (*int*, TM) and that it was "a positive response" (*int*, TM) to the issues raised (n = 12). Top managers interpreted these expressions as a sign of "confidence that CILIP was going to be busy and going to do things that were of interest and concern to them" (*int*, TM).

4.2.4. Implementing the finalized strategy

Based on the community's emotional expressions, top managers felt they had "pretty good buy in" (*int*, TM) as well as "enough clarity … in the areas people want us to have an impact in, for us to organize our strategic direction for the next four years" (*int*, TM). Therefore, they began the implementation of the finalized strategy given that "a lot of responses from the consultation were 'you've got to stop looking inwards and start focusing outwards on impact and delivery'" (*int*, TM) enacting the strategy was a priority in itself.

Top managers also launched a new advocacy campaign called 'My Library By Right' (*doc*), advocating for the skills of public librarians and against the closure of public libraries, by stressing the government's statutory requirement to provide public libraries as an essential public service. "Strong messages" (*int*, TM) from CILIP's community concerning advocacy "influenced [this] outcome" (*int*, TM):

> *"People [were] expressing the view that, for a lot of people, our profession and the public libraries are a very visible part of our profession, and if we lose public libraries, we lose a lot of public understanding about what libraries do and their potential."* (*int*, TM)

> *"[My Library By Right is] clearly an important one and central to what CILIP need to be doing. The membership made that clear, especially with the issues with public libraries."* (*int*, TM)

On the back of being "visible … and influential" (*int*, TM), parts of the community were quoted as having "a renewed sense of purpose and enthusiasm (*doc*). Top managers also described "a sudden uptake in renewals and people re-joining, as a result of [CILIP] visibly standing up for libraries" (*int*, TM), explaining how:

> *"The negative voices have gone away since My Library By Right, because they were just really frustrated with us not being something. And now we have, now that CILIP is back, they're leaving us to it"* (*int*, TM).

These assertions were corroborated by the community, who stated that:

Table 5b

Major issues emerging from peripheral actors' emotional expressions based on total emotional volume (Phase 2).

Issue raised by peripheral actors	Emotion expressed	Emotion rating	Number of emotional expressions about issue	Emotional volume (Emotion Rating x Number of Expressions)	Total emotional volume of issue
Will anything actually happen?	Cynicism	−3	22	−66	−66
Proposed change is good	Positive sentiments	3	12	36	36

> *"We [the community] did pick up on the BBC news report that CILIP instigated about libraries and librarians and getting volunteers to say how they needed professional librarians to support them. That was positive. It's good to see them speaking out about it"* (*int*, C).

In attending to the community's expressions of emotion, top managers believed that the increasing proportion of positive relative to negative expressions of emotion represented parts of the professional community "saying … this is starting to sound better, but it's not the answer yet" (*int,* TM), reflecting the need to sustain their interaction with the community. Whilst "there [would] always … be people that are negative" (*int, C*), top managers hoped that "gradually, the positives will drown out the negative voices" (*int, C*). As one participant reflected:

> *"It might be a long-term process for … them, because there are some quite strong … anti-CILIP views. So, I think it might take a long time to get some people on board, but I think it really has started to make those changes. It's really positive." (int,* C).

5. Discussion

We sought to understand how top managers can capture and use expressions of emotion from peripheral actors—those who are not typically involved in strategy-making—for strategy formulation. Having recognized a need to reassess their strategy as a result of the emotional tumult emanating from peripheral actors, CILIP's top managers engaged in 'emotion processing' to understand the nature of, and respond to, these emotional expressions. This allowed top managers to decipher more precisely the nature of these emotional expressions and use this information to guide their subsequent strategy- and decision-making, in a way that helped to address the emotional tumult and its implications for the organization's performance. We begin by discussing our model (Fig. 2) which explicates how top managers captured and used peripheral actors' emotional expressions during inclusive strategy formulation, before unpacking our theoretical contributions.

When **recognizing peripheral actors' emotional tumult (A)**, top managers are motivated to engage in emotion processing. E*motional tumult* (A1) is a state of 'noise' created by peripheral actors expressing emotion towards the organization and its strategy that top managers might recognize, but not (fully) understand. This emotional tumult could be negative in tone, as in our case, but feasibly could be positive, as peripheral actors express excitement or interest in an emerging technology (e.g., artificial intelligence) or a different opportunity that the organization faces. In both cases, emotional tumult creates *a need for top managers to reassess strategy* (A2): whilst negative emotional tumult might signal dissatisfaction with (an aspect of) the current strategy, or an emerging environmental threat, positive emotional tumult could signal an emerging opportunity that might enhance performance, if capitalized upon, necessitating top managers to engage in strategy work.

Top managers undertake 'emotion processing' to understand and decipher peripheral actors' emotional tumult, which begins with **canvassing peripheral actors' emotional expressions (B)**. First, top managers *outline their strategic intentions* (B1), to provide a focal point for discussion. Strategic intentions may be more or less developed, depending on how well top managers understand the initial emotional tumult, and how inclusive top managers wish strategy formulation to be. This may also be determined by resources (e.g., time, personnel) at their disposal. Top managers must also *create spaces for emotional expression* (B2), where peripheral actors can express their feelings concerning the extant and proposed strategic direction(s). These spaces might be digital (e.g., social media, online surveys), analog (e.g., face-to-face discussions), or a combination of the two. Indeed, to engage as many peripheral actors as possible and capture the full array of emotional expressions, top managers need to cast the proverbial net far and wide, i.e., provide both digital and analog spaces where emotion can be expressed. Effectively creating space also involves top managers demonstrating a genuine intention to listen to, and understand, peripheral actors' emotional expressions. Although this does not guarantee that peripheral actors' will engage and express their emotions, these displays encourage this possibility (see Kaplan et al., 2014).

Next, **harnessing peripheral actors' emotional expressions (C)** must occur. Harnessing involves top managers actively including peripheral actors and allowing them to express their emotions towards the outlined strategic intentions using the analog and digital spaces provided. Peripheral actors may *express negative* (C1) or *positive* (C2) emotions depending on how they feel towards the proposed strategic intentions. Although top managers play a less prominent role during harnessing, they are still active, as they must find ways to capture and codify emotional expressions such that they can reflect upon them. Digital mediums (e.g., social media, online surveys) inherently provide this capacity, whilst more consideration is necessary to both recognize and capture emotional expressions when using analog communication channels (e.g., face-to-face discussions).

Finally, top managers utilize these emotional expressions as information to guide their strategic decision-making, **integrating peripheral actors' emotional expressions into strategy (D)**. Given top managers' finite resources, they cannot attend to all issues raised and emotions expressed by peripheral actors or risk being overloaded with information (Hautz et al., 2017; Morton, 2023). Accordingly, top managers consider the *emotional volume* (D1)—i.e., how an issue is expressed emotionally (e.g., positive/negative, low-/high-activation emotion) and how many times the issue is expressed using that emotion—of issues, to determine what they should pay attention to and prioritize. Issues can establish emotional volume through three main pathways: using high-activation emotions expressed frequently; low-activation emotions expressed frequently; as well as high-activation emotions expressed infrequently. What constitutes a high or low emotional volume is relative to the emotional volume of other issues; in some circumstances, relatively lower emotional volumes might be sufficient to attract top managers' attention.

Having determined which issues to pay attention to according to their relative emotional volumes—which is largely based on their level of intensity—top managers then interpret the valence of the issue. When issues have been raised and expressed using negative emotion, this signals to top managers that there is a problem with an aspect of the strategy contents that *requires adjusting* (D2). Conversely, when issues are expressed using positive emotion, this indicates approval of, and support for, the outlined strategic

intentions (or an aspect of these intentions) encouraging *strategy contents are maintained* (D3). Generally, there is no need for top managers to alter strategy based on positive emotional expressions, although it is feasible that they might prioritize an aspect that triggered excitement or other high-activation positive emotions. Altering the contents of the strategy using the insights afforded by peripheral actors' emotional expressions can allow top managers to try and address the basis of peripheral actors' emotional tumult (Formulating Strategy to A1). Depending on the extent to which the newly formulated strategy addresses peripheral actors' emotional tumult (A1), the need for top managers' emotional processing might cease or top managers might engage in further canvassing, harnessing, and integrating, as they seek to address strategic issues that create emotional tumult through the formulation of strategy.

6. Theoretical contributions

6.1. Using peripheral actors' emotional expressions as an informational resource during inclusive strategy formulation

Our primary contribution is to unpack how top managers engage in emotion processing, allowing them to capture and use peripheral actors' expressions of emotion as information to guide how they make decisions and formulate strategy. Drawing on positive and negative emotional expressions can help top managers understand where there is (not) support for a strategic direction, and where the content of strategy might be reified or adjusted. Although prior research has acknowledged that peripheral actors' emotional expressions might be noticed by top managers and shape their strategy formulation efforts (e.g., Maitlis and Ozcelik, 2004; Toubiana and Zietsma, 2017; Lundgren-Henriksson and Sorsa, 2023), it has remained unclear how they might practically 'use' such insights. We unpack the precise processes (canvassing, harnessing and integrating) that allow top managers to comprehend and use emotional expressions to inform strategy formulation, developing the idea that (expressions of) emotion can be informational, an idea that has been signaled but remains under-developed in the strategy literature (e.g., Vuori et al., 2018; Netz et al., 2020). This informational perspective complements existing work, which has argued that peripheral actors' emotional expressions can be used as an 'energizing' resource by top managers to drive strategy formulation (Feldman and Quick, 2009). Together, our work shows how top managers might utilize peripheral actors' emotional expressions to shape both the dynamics and content of strategy, which can facilitate effective coordination (Stephens et al., 2013). Moreover, we extend research suggesting that top managers respond only to negative emotional expressions (e.g., Feldman and Quick, 2009; Toubiana and Zietsma, 2017; Lundgren-Henriksson and Sorsa, 2023) by demonstrating their responsiveness to both positive and negative emotional expressions, and explaining this is because these different types of emotional expression provide top managers with unique insights on strategy and how to act.

The salience of peripheral actors' emotional expressions, and the need for top managers to comprehend this information, could be more profound in certain contexts. For example, this may exist where top managers' main purpose is to front the interest of organizational members and other key actors in professional associations. Similarly, it may hold true in other pluralistic settings where top managers must include a vast range of peripheral actors and attempt to better understand their distinct needs during strategy formulation. In these settings, the emergence of emotional tumult—expressions of emotion made by peripheral actors concerning the firm's strategy, which are not (fully) understood by top managers—can signal strategic issues to top managers that may require a reassessment of strategy. The emergence of professional or institutional threats that require a coherent strategic response, or dissatisfaction with top managers' strategic decisions that require reconsideration (e.g., Feldman and Quick, 2009; Toubiana and Zietsma, 2017), can both be a source of negative emotional tumult that top managers need to understand and respond to. Equally, a more positive type of emotional tumult could feasibly emerge from peripheral actors' excitement at an emerging opportunity (e.g., technology, legislative changes). The existence of emotional tumult indicates that top managers need to reassess strategy in either a whole- or piece-meal fashion, based on opportunities or threats in their environment. Our findings therefore bear relevance to the literature on dynamic capabilities, suggesting that emotional expressions can be a source of information that top managers might use to 'sense' strategic issues requiring potential change and adaptation (e.g., Hodgkinson and Healey, 2011).

Using emotional expressions as a source of information can allow strategy formulation to become emotion-driven, which—in turn—could help top managers to regulate the emotions of peripheral actors. Our findings demonstrate how top managers were able to cultivate (more) positive emotional expressions at CILIP when strategy formulation was guided by peripheral actors' expressed emotions, as emotionally evocative issues were addressed in the new iterations of strategy. Emotion processing might therefore be a basis for top managers to regulate peripheral actors' emotions (Vuori and Huy, 2022) and establish emotional dynamics conducive to change (Huy, 1999). This may be contingent on top managers genuinely engaging with, and responding to, peripheral actors' expressions of emotion: a failure to do so risks peripheral actors becoming angry and frustrated if their contributions are ignored or not addressed (e.g., Baptista et al., 2017; Brielmaier and Friesl, 2023). As such, a potential benefit of open strategy (Whittington et al., 2011; Hautz et al., 2017) might be its capacity to produce strategies that accurately reflect peripheral actors' needs and wants and therefore cultivate positive emotions and sentiments. Yet, an emotional 'dilemma' (Hautz et al., 2017) of open strategy may exist: although it could help to establish positive emotions when done effectively, it can also have the opposite effect and cause negative emotions, when peripheral actors' emotions and contributions are not effectively managed.

Finally, our findings also reveal nuances in how top managers interpret and respond to the dimensions of peripheral actors' emotional expressions. Whilst the level of activation seemed to inform how top managers allocated their attention, the valence of the emotional expression determined how they subsequently behaved (i.e., whether they maintained or altered the strategy contents). Thus, our study fundamentally addresses calls to 'make strategy hot' (Hodgkinson and Healey, 2011; Healey and Hodgkinson, 2017) by elaborating how top managers may interpret and use (expressions of) emotion to formulate strategy, as well as the associated benefits of doing so (i.e., capacity for emotion regulation). In doing so, we argue that top managers can be active agents who seek and engage with—rather than passively receive (e.g., Maitlis and Ozcelik, 2004; van den Oever and Shropshire, 2024)—emotional expressions, to

facilitate their decision- and strategy-making efforts.

6.2. Dealing with peripheral actors' contributions to strategy: the emotional volume of issues

Our second contribution relates to how top managers allocate their attention to issues raised by peripheral actors and determine which issues and emotional expressions require integration into strategy. Specifically, we suggest that top managers are attentive to the 'emotional volume' that an issue generates, considering how an issue (e.g., membership fees) has been expressed emotionally by peripheral actors (e.g., low-activation emotion such as sadness, versus high-activation emotion such as anger), and how frequently peripheral actors raise this specific issue using that specific emotional framing. Emotional volume helps top managers to recognize what are pressing issues in the eyes of peripheral actors, and where they ought to pay attention. This is crucial, because top managers have finite time and attention at their disposal, and therefore cannot engage with every suggestion made by peripheral actors or risk suffering from information overload (Hautz et al., 2017).

We contribute to the ongoing debate about how top managers' attention is guided during (open) strategy formulation (e.g., Nicolini and Mengis, 2024; Ocasio et al., 2023; Splitter et al., 2024), suggesting that the emotional expressions or 'framing' (Raffaelli et al., 2019) of peripheral actors' contributions can affect top managers' attention. Whilst some have suggested peripheral actors can use structural means to influence managers by creating or coopting communication channels (Plotnikova et al., 2024), others have emphasized the discursive competence of peripheral actors (e.g., Mantere and Vaara, 2008; Splitter et al., 2024). Our findings relate to this discursive perspective, suggesting that peripheral actors' contributions may attract more attention when expressed using high-activation emotions. Although earlier research has emphasized the valence of emotional frames (see Raffaelli et al., 2019), our findings suggest that the level of activation is perhaps more important, in the sense this is what garners top managers' attention first and foremost. The valence of emotional expressions guides how top managers—once engaged—should act. An important takeaway, therefore, is that high-activation emotional expressions can help signal issues of concern to top managers, helping peripheral actors to establish attentional coherence with top managers (Rerup, 2009). Although it is not essential to use high-activation emotions—given lower activation emotions expressed sufficiently frequently can also garner significant emotional volumes—one takeaway from our study is that the level of activation may be more pressing than valence, despite prior assertions that top managers might be predisposed towards either the valence or activation of emotional expressions (Netz et al., 2020).

6.3. How the structure of inclusive strategizing spaces can affect emotional expressions

Our final contribution is to the ongoing debates about the design and management of spaces for (open) strategy formulation (e.g., Vaara and Rantakari, 2024). We elaborate on how the emotional affordances of analog and digital spaces (for distinction, see Baptista et al., 2017; Morton et al., 2022) that top managers might use to solicit contributions from peripheral actors may differ. Whilst digital spaces generated a greater overall number of emotional expressions, analog (digital) spaces harnessed more positive (negative) emotional expressions. These differences in the amount and type of emotion expressed in each space can have ramifications for how inclusive strategizing and organizing might be conducted, as well as their associated strategic decisions and outcomes, therefore constituting an important consideration for top managers when they undertake canvassing.

For instance, peripheral actors may be less willing to express emotion in analog spaces because they might be judged by others, making it difficult for top managers to harness and use emotional expressions as information to guide strategy formulation. Although digital spaces can afford anonymity (e.g., Mount et al., 2020) which might overcome this issue, this anonymity may also result in the suspension of emotional norms (Van Kleef, 2009) and lead to 'emotional echo chambers' (Toubiana and Zietsma, 2017; Lundgren-Henriksson and Sorsa, 2023) emerging, where negative emotional expressions become amplified and interpersonal conflicts emerge to the extent that strategy-making is not possible. In contrast, the physical co-presence of analog spaces means they are often more dialogic (Jarzabkowski and Kaplan, 2015), whilst leaders may be better able to pick up on other dimensions of emotional expressions, such as facial expressions, intonation in voice, and other physical cues (e.g., gestures, posture) that are not observable when strategy is digitally mediated (Kouamé and Liu, 2021).

Therefore, when considering how to structure open, inclusive modes of organizing and strategy formulation, top managers must not only account for when to open (include) and close (exclude) contributions from peripheral actors (e.g., Dobusch et al., 2019), but also contemplate the types of spaces provided in which peripheral actors can contribute to inclusive strategy-making (Morton et al., 2022; Ortner et al., 2024; Vaara and Rantakari, 2024). Analog spaces, such as workshops, can, for example, allow for rich face-to-face emotional engagement through fluid, decentralized discussions which may allow greater ownership of strategy formulation over time for the actors involved (Mack and Szulanski, 2017; Morton and Iglesias Ruiz, 2024). On the other hand, digital spaces such as Wikis or online forums can allow for extensive inclusivity by overcoming geographical limitations but may lack emotional depth over time as formulation requires more exclusive practices to take hold (Dobusch et al., 2019). The trade-offs that may exist between the use of digital and analog spaces may therefore constitute a further 'emotional dilemma' (see Hautz et al., 2017) of open strategy that hitherto remains underexamined.

7. Practical implications

The core argument that this paper makes is that peripheral actors' emotional expressions can be a valuable source of information for strategic decision-makers. Accordingly, those involved in strategy formulation—particularly in organizations where actors have divergent interests and objectives—might benefit from proactively seeking out, and engaging with, (expressions of) emotion, because

they can provide insight into the level of support or resistance that a strategy may face from peripheral actors. When strategy formulation is emotion-driven, it seems feasible that positive emotional dynamics—which can facilitate the adoption of new technologies and strategies (e.g., Healey and Hodgkinson, 2017; Raffaelli et al., 2019)—will be established. Indeed, a benefit of more open and inclusive strategy processes is the promise of creating strategies that more accurately reflect the needs and wants of peripheral actors, although when strategy formulation is symbolically open, it may have the opposite effect and create negative emotions. Attending to peripheral actors' feelings and desires may also permit other benefits, such as increased identification and engagement with the organization, to manifest as a byproduct.

Relatedly, from the perspective of peripheral actors seeking to contribute to open, inclusive strategy formulation initiatives, the use of high-activation emotions (e.g., excitement, anger) seems key to garnering top management attention. The valence of emotions (i.e., positive/negative) may be a secondary consideration in gaining top managers' attention, only becoming relevant when there are a high number of contributions, in which case issues expressed using negative emotion trump issues expressed using positive emotion. Valence, instead, is more important as a signal to leaders, and how they should act.

The capacity to make (inclusive) strategy formulation emotion-driven may also depend on how this process is structured and designed. A combination of digital and analog (i.e., face-to-face, physical) spaces is important to soliciting emotional expressions from peripheral actors, alongside top managers and leaders displaying genuine openness and empathy. The specific combination of spaces may be somewhat contextual, taking into account the nature of peripheral actors. For instance, their geographic locations, ages, and digital capabilities may all play a role in whether digital spaces are required. Despite the recent emphasis on digital strategizing (see Morton et al., 2022), the value of analog spaces—in which top managers can pick up on dimensions of emotional expressions such as intonation, facial expression, gestures and postures—should not be forgotten, and remains a crucial space for strategy-work. The growing use of video calling software (e.g., Microsoft Teams, Zoom) might allow some of these dimensions of emotional expression to be picked up on, but not in a way that the collective atmosphere (see Knight et al., 2024) can be effectively gauged.

8. Limitations and future work

In this study, we advance understanding of how top managers can utilize peripheral actors' emotional expressions when formulating strategy inclusively. These emotional expressions behave as information that top managers can capture and use to sense-check and guide their strategic decisions and actions, through emotion processing. Understanding the appropriateness of strategic decisions and directions can allow top managers to formulate strategy in a way that more accurately reflects and addresses the needs and wants of these peripheral actors, which can lead to higher levels of commitment and smoother implementation as a result. Our study therefore addresses calls to consider how the emotional expression of peripheral actors beyond the top management team can shape strategy formulation (see Brundin et al., 2022), and to 'make strategy hot' by considering and integrating emotion more centrally into the strategy process (Hodgkinson and Healey, 2011; Healey and Hodgkinson, 2017). We also unpack how the different dimensions of emotional expression—valence and activation—may differentially affect top managers' behavior, the latter guiding their attention and the former guiding how they should act, during strategy formulation.

Although a limitation of our study is that it is a single case of a professional association, whose core purpose is to front the interests of its members, we believe our findings and model will transfer to other settings, such as other trade unions and professional associations (e.g., University and College Union, British Computer Society), third- (e.g., Unicef, Oxfam) and public-sector organizations (e.g., UK National Health Service). In characterizing CILIP as a pluralistic organization (i.e., Denis et al., 2007), given its distributed structure and diverse actors, our findings may also bear relevance to other pluralistic, contemporary settings, such as universities (e.g., Azad and Zablith, 2021) and hospitals (e.g., Lusiani and Langley, 2019). It is therefore viable that a similar process of inclusive strategy formulation might emerge in these contexts as well. This is an exciting avenue for future research, to understand whether our arguments concerning the utility of expressed emotions hold true in other organizations, where leaders are (re)formulating strategy, or perhaps in settings where peripheral actors are particularly happy with existing strategies. It would also be interesting to understand whether and how emotion processing could unfold in strategy formulation where peripheral actors are not actively involved – e.g., top managers canvassing and harnessing peripheral actors' emotional expressions on social media, without peripheral actors being pro-actively engaged or maybe even aware.

Another limitation is the retrospective nature of our analysis, thus future research might explore these dynamics in real-time as they unfold during strategy formulation and follow them for sustained periods to discern longer-term performance implications. This could help us understand whether top managers' decision to attend to emotional expressions was beneficial or not from a more economic perspective. A real-time study might also allow us to comprehend the authenticity of emotional expressions, and whether they reflect peripheral actors' internal feeling states or not. Prior research has suggested that inauthentic emotional displays by top managers can stymy their ability to influence strategy (e.g., Brundin and Melin, 2006; Brundin and Nordqvist, 2008), but whether this effect applies to peripheral actors who are not usually involved in strategy remains to be seen.

Future studies might also consider studying emotional expression beyond the dimensions of written and spoken word, such as facial expressions, intonation, and bodily gestures. Our focus on the spoken and written dimensions of emotional expression means that we may have undersold the emotionality of analog spaces, where peripheral actors may have expressed their emotions in ways other than spoken or written word. This should be a focus of future research. It would also be interesting to consider multimodality (e.g., Höllerer et al., 2018), and how emotion might have been expressed through the design of PowerPoint, spaces, or even images and logos, for example.

Despite identifying variances in the emotions expressed in different spaces, we could only speculate why this was the case. Future research might seek to explore this more systematically to identify the varying affordances of, for instance, social media and surveys,

for eliciting emotional expressions. Studies of 'trolling' (e.g., Golf-Papez and Veer, 2022) and 'affective polarization' (see Arora et al., 2022) on the internet and social media perhaps indicate that more extreme or intense emotional expressions (e.g., disgust) might occur more often in digital spaces, compared to analog spaces such as face-to-face discussions. It would also be interesting to understand how spaces might be designed or coopted by peripheral actors (e.g., Plotnikova et al., 2024) who wish to express emotion, as well as whether, and how, 'emotional interplay' between top managers and peripheral actors might shape the process and outcomes of strategy formulation.

Finally, it would be interesting to examine more closely—in real-time—how strategy formulation can be used to shape and regulate actors' emotions. Our findings suggested a potential for top managers to shape subsequent (expressions of) emotion through the contents of strategy, whilst research on the social sharing of emotion suggests that discussing and re-living negative emotional experiences with others can help actors alter the meaning attributed to such situations and experience 'emotional recovery' (Rimé et al., 2020). We wonder whether and how inclusive modes of strategy-making might afford space for, and thus enable, such 'emotional recovery' to take place.

In considering the behavioral aspects of (inclusive) strategy formulation, we hope that our study provides a more balanced perspective on emotion in the strategy process, where the default position has often been that emotion is undesirable, impedimentary and to be avoided. Rather, we hope that our study reinforces to scholars and practitioners alike that strategy is an embodied act imbued with emotion, and that (expressions of) emotion can be a valid source of information that decision-makers can—and should—draw upon when making strategic choices.

CRediT authorship contribution statement

Christopher Golding: Writing – review & editing, Writing – original draft, Visualization, Validation, Methodology, Formal analysis, Conceptualization. **Josh Morton:** Writing – review & editing, Writing – original draft, Visualization, Validation, Project administration, Methodology, Formal analysis, Data curation, Conceptualization. **Aljona Zorina:** Writing – review & editing, Writing – original draft, Methodology, Conceptualization.

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Appendix A. Supplementary data

Supplementary data to this article can be found online at https://doi.org/10.1016/j.lrp.2024.102482.

Data availability

The authors do not have permission to share data.

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