

IMPLEMENTING STRATEGIES: BARRIERS AND FACILITATORS IN THE SPECIALIZED BRAZILIAN LITERATURE

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ABSTRACT

This article aggregates empirical evidence of the main barriers to and facilitators of the implementation of different strategies at organizations in Brazil. It is a theoretical study that uses as its starting point those studies that regard strategy as a social practice, with conclusions based on research found in the main Brazilian publications from 2000 to 2007. The authors' intent is to answer three questions on strategy studies in Brazil simultaneously: Has the publication of theoretical studies dropped considerably in the specialized meetings in our country, with the risk of falling into empiricism devoid of theoretical thinking? Does the area have a colonized position vis-à-vis Anglo-Saxon studies? In addition, is there a shortage of studies on strategy implementation processes, given that the research tends to focus on the formulation of strategies? Though thoughts and references from international literature are not disregarded in this study, especially concerning the theoretical input of strategy as practice, the authors aim to gather domestic knowledge capable of illustrating the reality of Brazilian organizations on the issue in question. This article concludes that certain factors that facilitate the effective implementation of strategies may actually constitute barriers, depending on how the strategy is conducted by the individuals and the groups that interact constantly within organizations.

Keywords: Strategy implementation. Strategy as practice. Strategy in Brazil.

IMPLEMENTAÇÃO DE ESTRATÉGIAS: BARREIRAS E FACILITADORES EVIDENCIADOS NA LITERATURA BRASILEIRA ESPECIALIZADA

RESUMO

Nesse artigo busca-se reunir as evidências empíricas das principais barreiras e facilitadores da implementação de diferentes estratégias nas organizações no Brasil. Trata-se de um ensaio teórico que parte da corrente de estudos que concebe a estratégia como uma prática social, com conclusões baseadas em pesquisas nas principais publicações brasileiras de 2000 a 2007. A intenção é de responder simultaneamente a três questões colocadas pelos estudiosos de estratégia no Brasil: a publicação de estudos teóricos tem diminuído consideravelmente nos encontros especializados em nosso país, podendo cair em um empirismo sem grandes reflexões teóricas; a área possui posição colonizada frente aos estudos anglo-saxônicos e; há uma carência de estudos sobre os processos de implementação de estratégias, já que o foco de pesquisas é em relação a formulação de estratégias. Não se descarta reflexões e consultas a literatura internacional nesse estudo, em especial nos aportes teóricos da estratégia como prática, mas busca-se reunir conhecimento nacional que ilustre a realidade das organizações brasileiras sobre o assunto. No artigo conclui-se que alguns fatores que facilitam a efetiva implementação de estratégias podem se constituir em barreiras, dependendo como a estratégia é realizada pelos indivíduos e grupos em constante interação nas organizações.

Palavras-Chave: Implementação de estratégia. Estratégia como prática. Estratégia no Brasil.

1 INTRODUCTION

Organizational strategy studies generally have a research focus, while more encompassing studies center on the issues of forming and formulating strategies. *Strategy Safari*, the famous book by Mintzberg, Ahlstrand and Lampel (2000), exemplifies this statement, as the authors divide and organize knowledge on the subject into 10 schools of strategy formation and formulation, but give little emphasis to implementation processes (GALAS, 2004). The issue of strategy implementation in practice and the main difficulties, facilitators and complexities involved are relegated to a secondary position not only in the said book, but also in the set of knowledge produced in this field. Certain authors have raised this issue as one of the field's major weaknesses, as little is known about the subject (WALDERSSE and SHEATER, 1996). Despite substantial growth of the theoretical schools that challenge the rationalistic assumptions of the three prescriptive schools of strategy (MINTZBERG, AHLSTRAND and LAMPEL, 2000), which regard strategy as an organizational project (ANDREWS, 2006), a plan to be followed (ANSOFF, 1990), or a market positioning to be attained (PORTER, 1986), emphasis on organizational processes for strategy implementation is still very minor. This article collates empirical evidence of the main barriers to and facilitators of the implementation of different strategies in Brazil's organizations.

In addition to lack of research and studies on the subject, a significant reduction of theoretical thinking in the strategy area appears to have occurred at scientific meetings in Brazil, given that the focus of researchers has turned toward studies of a predominantly empirical nature, according to research conducted by Rossoni, Guarido Filho, Francisconi and Albuquerque Filho (2007). If on the one hand this may reflect a more mature stage of Brazilian academia, on the other it may also signify a conceptual impoverishment of this research field. There is also the risk of falling into a strong empiricism devoid of significant theoretical thinking (ROSSONI, GUARIDO FILHO, FRANCISCONI and ALBUQUERQUE FILHO,

2007). Because strategy is best understood as a social practice (WHITTINGTON, 1996) carried out by people interacting in the different organizations that make up society, and knowing that these strategies have consequences for the countless aspects of the social and economic system of which they are part (WHITTINGTON, 2004), this drop in theoretical essays should be regarded with care by the area's academicians. Merely finding out what empirical data shows us is not enough; it is also necessary to develop intellectual thinking on these empirical findings based on different theoretical and even epistemological points of view. We believe that this is essential to enriching the knowledge produced in the field, respecting the coherence of the various assumptions of each line of thinking, while lending a voice and providing legitimacy to the diversity of paradigms provided by philosophy and by the social sciences that contribute to strategy studies.

Research conducted by Bignetti and Paiva (2002) shows that those who study strategy in Brazil adopt a colonized position: The theoretical input and empirical evidence generated by research into our reality are disregarded in favor of knowledge produced in countries of Anglo-Saxon origin. The three factors mentioned (lack of research into strategy implementation, a drop in the number of theoretical essays at specialized gatherings in Brazil, and the colonized position of our researchers) are the reasons why the authors of this paper sought to systematize the knowledge produced and published on strategy implementation in Brazil's main events and journals. Coupled with this there is a vigorous contribution from those researchers that study strategy as a social practice, the theoretical perspective predominantly adopted in this article. It was the paradigm used because it was seen as a line of thinking about strategy that is best suited to explain and to reflect upon the subject.

This research was conducted in the main periodicals, specialized journals and scientific events in the field of organizational strategy in Brazil, covering the period from 2000 to 2007, a time span considered sufficient to

systematize Brazilian knowledge on the subject. The journals consulted were *Revista de Administração Contemporânea* (RAC); *Revista de Administração Contemporânea* in electronic format (*RAC Eletrônica*); *Revista Organizações and Sociedade* (O & S); *Revista de Administração de Empresas* (RAE-FGV); *Revista de Administração Pública* (RAP-FGV); and *Revista de Administração da USP* (RA-USP). The proceedings of scientific events that were researched were those of ENANPAD (the National Meeting of the National Association of Research and Graduate Studies in Management), in the Organizational Strategy thematic area, and of EEE (Strategy Studies Meeting), both of which are organized by ANPAD. These periodicals, journals and events were chosen for their quality and for their legitimacy among Brazilian academics, as they are all considered to be of a high level in terms of domestic intellectual production.

The position adopted in this article does not intent to be xenophobic; this is evident from the fact that the point of view that forms the backdrop for this study, i.e., “strategy as practice,” was developed mainly in Europe. However, as the main authors of this school of thought point out, strategy is influenced by the national context of which it is part. We therefore tried to focus on what Brazilian research into organizations that operate within Brazil encounter when they implement their strategies. The emphasis is on the factors that constitute barriers to or facilitators of this process.

To this end, this article is organized into five parts, the first of which is this introduction. The second is a theoretical reference framework on the implementation of strategies, based primarily on the “strategy as a social practice” point of view. The third starts presenting the results of the research and mainly discusses the principal barriers encountered when implementing strategies. The fourth shows the facilitating factors. The fifth, on the final conclusions, is where we present the main thoughts on the research conducted.

2 STRATEGY AS PRACTICE AND STRATEGY IMPLEMENTATION

In 1996, Richard Whittington, currently a professor at the University of Oxford's Saïd Business School, published a seminal article, "Strategy as Practice," in *Long Range Planning*, an English journal on organizational strategy research. Ever since, the perspective of strategy as social practice has provided a strong theoretical contribution to thinking on strategy. It allows room for different research methodologies, contributes to the expansion of the legitimacy of in-depth qualitative methodologies, and congregates researchers with different theoretical points of view and from different disciplines, who help to consolidate a school of strategic thinking that is highly fruitful in terms of theoretical texts, empirical research and innovative ideas. There is now a virtual community created by Whittington and his colleagues, with its own website (<http://sap-in.org>), for discussing and making available articles with a broad focus on studies about strategy design, intentional and emerging strategies, strategic change, and the multiple relations of this with organizational and social results. This virtual community has more than 2,000 members worldwide.

The article published in 1996 suggests that strategy should be treated as a social practice and that although the process perspective provided major contributions to strategy studies, research continues to focus mainly on the organization as a whole. Whittington states that it is necessary to change our research focus regarding how the practitioners conduct the strategy. One should learn more about "strategizing," i.e., about the ongoing process of producing strategy within an organization. To this end, one must examine and study the level of the practitioners, seeing how they act and interact in the organization and finding out what their skills, aptitudes and performances are (WHITTINGTON, 1996).

Although organizational studies have long been an interdisciplinary field, specifically in terms of strategy studies, the field that has historically guided research and provided it with its main conceptual elements has been economics (WHITTINGTON, 2006). As the core discipline guiding the strategy area, on the one hand, it has provided significant contributions to the strategy field; on the other, it has limited the vision of researchers and

students about aspects not traditionally studied by economists. Gradually, strategy studies are becoming richer thanks to the theoretical input of other disciplines from the social sciences (MINTZBERG, AHLSTRAND and LAMPEL, 2000), but it is only via the theoretical perspective known as “strategy as social practice” that contemporary social theory, sociology in particular, has been definitively incorporated into the studies of the area (WILSON and JARZABKOWSKI, 2004; WHITTINGTON, 2004).

This fact propitiated a vigorous contribution to field researchers, given that the wealth of contemporary sociology, with its focus on social practices, helped them to understand institutional, organizational and strategic processes better. These were previously disregarded or considered secondary by other schools of strategic thinking.

Strategy understood as a social practice, without disregarding the contributions from other disciplines and theoretical lines of thinking of this field of study, tries to relate individuals’ microactivities with organizational and social results (WHITTINGTON, JOHNSON and MELIN, 2004). It considers that these microactivities and practices are conducted interactively and that the individuals within an organization, in their constant process of creating strategy, i.e., of strategizing, are involved with complex power relations and shared meanings within the organization. Thus, focusing on social practice tends to lie between structural sociology and methodological individualism (GIDDENS, 2003; CHIA, 2007), neither considering only the macrostructural issues (whether economic, cultural or social), nor merely studying a collection of individual actions divorced from their milieu. To the contrary, it aims to articulate social space as a legitimate arena. These practices are not a simple synthesis of macroscopic and microscopic contributions, but a legitimate arena with its own specificity, even though other levels of analysis contribute to it.

In addition to the analytical focus, the theoreticians from this school of thought, being highly influenced by sociology-based institutional theory, showed that strategy is best understood within a specific sociocultural context, given that the tools used by the organizational players are taken from their milieu through socialization processes and institutions (BERGER and LUCKMANN, 2003; MEYER and ROWAN, 1977; DIMAGGIO and POWELL,

1983; SCOTT, 2001, 2003), such as business schools, consulting firms and publishers of management books. Rather than merely making use of certain tools in a totally pre-established manner, the organizational players ascribe certain meanings to models, techniques and theories, to put them into practice in a specific manner, which manner is also affected by the power relations within the organization. Thus, the practical point of view on strategy aims to relate the activities and practices conducted by the individuals in the organization with their environmental context in a vertical analysis, as well as relating such activities (processes) with their results (content) in a horizontal analysis (WHITTINGTON, 1996, 2002a, 2002b, 2004, 2006; WHITTINGTON, JOHNSON and MELIN, 2004; WILSON and JARZABKOWSKI, 2004; JOHNSON, LANGLEY, MELIN and WHITTINGTON, 2007), these results not being studied only from a financial standpoint.

Based on the evidence presented, one can easily understand why the same strategy model, when implemented, may contribute to the achievement of the objectives of one organization while having no functionality whatsoever at another, becoming, rather, a hindrance to the organization's performance.

The context of the organization – the organizational players' interpretation of the models, their personal interactions, their power relations and the limitation of resources that condition the use of these models – determines how models are implemented in practice. An organization's success or failure cannot be attributed only to its models, theories or techniques per se, but to the use to which these are put, i.e., to how they are implemented in practice. Just like a rule, in its open formulations, has several specific qualifications (GIDDENS, 2003) while the meaning of a word is only understood when it is used as part of a language (WITTGENSTEIN, 1994; MARCONDES, 1997; MATTOS, 2003; AMÂNCIO and GONÇALVES, 2007), so a strategy model is better understood based on the social practice that it conditions, given that it undertakes a certain specificity in each organization that uses it and can only be understood within the practical context in which it occurs. Even if the practitioners totally dissociate a model from its theoretical bases, it is important to study

models that are being used and particularly how they are used (JARZABKOWSKI, 2003; WHITTINGTON, 2002c) and the results that are achieved through them.

Though there has been significant progress in the strategy theories that deal with formulation and implementation as a single process (MINTZBERG, AHLSTRAND and LAMPEL, 2000), the international literature provides evidence that most of the strategies succumb during implementation, regardless of formulation quality (WALDERSSE and SHEATER, 1996; ALLIO, 2005; SCHAAP, 2006). Mariotto (2003) shows that not only the intentional strategies should be implemented, but also the emerging strategies (MINTZBERG, 2006), for strategic behavior to be effective. Based on these thoughts, in the next section we present some of the evidence found in the specialized domestic literature on the main barriers to implementing different organizational strategies in Brazil. In the subsequent section, we present the factors that facilitate implementing strategies in organizations in Brazil.

3 BARRIERS TO STRATEGY IMPLEMENTATION

Research on the subject is still incipient, but nevertheless certain barriers to implementing different strategies were identified in organizations in Brazil. Though there are only a few studies on what the barriers to strategy implementation are, there is a great variety of strategies to be implemented, as well as diversity in the profile of organizations. We chose to present only those studies that clearly mentioned the main barriers identified in the empirical research, regardless of the strategy to be implemented and the type of organization studied. This presentation of results did not consider any one factor as more important than others. What was surprising, however, is that despite a diversity of strategies and organizations, many of the barriers are similar, as the results below indicate.

1) Lack of consensus, understanding and transparency regarding the

meaning of the enterprise mission and vision

Silva (2001), based on a study of Kaplan and Norton (1997), found this barrier in connection with implementing strategic planning at the COPEL power company in Paraná state. This is one of the four barriers highlighted by Kaplan and Norton (1997) in the implementation of strategies, particularly of the Balanced Scorecard system. Silva (2000) had already presented this in a theoretical study, but found empirical evidence in a subsequent study at COPEL (SILVA, 2001). This particular barrier causes the different groups that make up an organization to have different agendas as a result of their own interpretation of the organization's mission, vision and objectives. In the author's words, "their initiatives are neither integrated nor cumulative, as they are not associated coherently with an overall strategy" (SILVA, 2000, p.4).

2) Lack of relation between strategic content and strategic process

Based on Kaplan and Norton (1997), this was also studied theoretically (SILVA, 2000) and subsequently presented, after this barrier was found in empirical research on implementing strategic planning at COPEL (SILVA, 2001). This barrier keeps the target strategic position, after an analysis of the economic environment, from being converted into targets and objectives for the different sectors, departments, teams and individuals that make up the organization. Consequently, process and strategic content remain unrelated (SILVA, 2000).

3) Lack of coherence between strategic planning and resource allocation

Besides the two aforementioned barriers, the third one was identified in the process of strategy implementation at COPEL, according to Silva (2001). In this case, the organization's strategic planning is not aligned with the availability of funds. Thus, there are often two types of plans, devoid of the required integration (SILVA, 2000). The research of Rosseto, Orth and Rosseto (2004), on the implementation of a management information system (MIS) at the Blumenau City Council (state of Santa Catarina), also identified this aspect. Because the disbursement timetable and the project implementation timetable were divorced from each other, a

lack of physical resources for actual MIS implementation ensued (ROSSETO, ORTH and ROSSETO, 2004). However, one should stress that the city council's shortage of funds was due mainly to budget cuts, primarily driven by political, rather than technical, factors. In any event, this does not invalidate the evidence that this barrier stands in the way of strategy implementation processes.

4) Lack of strategic feedback

This is the last barrier presented by Silva (2000) based on the studies of Kaplan and Norton (1997). It was also presented in a theoretical study in 2000 and identified in the field research at COPEL in 2001 (SILVA, 2000, 2001). Since most of the indicators that firms use are financial (KAPLAN and NORTON, 1997), being the results indicators (MEYER, 2000), managers are unable to measure to what extent the organization is achieving its objectives. To this end, one would have to add process indicators to these results indicators (KAPLAN and NORTON, 1997; MEYER, 2000) to obtain feedback on strategy (SILVA, 2000, 2001). When this does not occur, one generally encounters the lack of strategic feedback barrier.

A study conducted by Galas (2004) at EMBRAPA, which aimed to measure the factors that interfered with implementing a strategic management model based on the Balanced Scorecard, also evidenced the presence of this barrier. A positive correlation (0.550387), based on quantitative data, was found between the number of meetings to monitor the model at the organization's units and during the model implementation stage. In other words, the units that monitored model implementation better were more advanced regarding the process (GALAS, 2004).

5) A relatively inflexible formal structure due to IT

In a study conducted in a hospital in the city of Porto Alegre (Rio Grande do Sul state), Jacques (2006) encountered organizational barriers to implementing medical and care protocols. For this author, the construction and actual implementation of these protocols distinguish one hospital organization from another, thus giving rise to competitive advantage. In the

approach known as "Resource-Based View" (BARNEY, 1991), which is the theoretical perspective that Jacques embraces in his study, an organization's resources are assets that enable it to design and implement strategies to improve its efficiency and effectiveness (BARNEY, 1991). Thus, the author believes that these protocols are fundamentally important strategic resources for the organizational management of the studied hospital (JACQUES, 2006).

In the implementation of these protocols, it was observed that the formal structure of the hospital was relatively inflexible concerning innovation and change processes, information technology (IT) being the area largely responsible for this barrier.

This was evidenced by IT's inability to quickly keep up with the changes in the organizational processes, which were required for the implementation of the medical and care protocols (JACQUES, 2006). Research on several case studies conducted by Brodbeck and Hoppen (2003) confirms the importance of strategic alignment between the business areas and IT in order to help corporate management and influence organizational performance.

6) Lack of involvement of the organization's management

In the same study mentioned above, Jacques (2006) identified major problems in the implementation of the medical and care protocols, due to the lack of senior management involvement and participation in the process. The author states that this was not evidenced in his theoretical reference framework, but it became clear in his empirical research. The hospital's senior management had little interest in the needs of the medical specialty areas in the sense of "exploring the management of the medical and care protocols as unquestionable strategic resources" (JACQUES, 2006, p.13).

Research conducted by Galas (2004) at EMBRAPA also found a positive correlation (0.586816) between the degree of involvement and participation of senior management and the strategic management model's

implementation stage. In this study, there was a very high correlation (0.960943) between the senior management participation in model implementation and its belief in the importance of its unit attaining the organizational objectives (GALAS, 2004). Additionally, the same author found that management involvement and support was the second factor, along with another two factors with the same scores, with the greatest negative influence upon the success of a strategic management model's implementation. In his work's conclusions, Galas (2004, p.14) stated that:

"Many barriers to the implementation of a management methodology based on the balanced scorecard were noticeable, especially in the absence of a strategic management culture among the company's managers. It appeared that the factors that interfered the most, both positively and negatively, with the implementation of the Strategic Management Model at Embrapa concerned all levels of management, whether the company's officers, the unit management, the model's manager or the managers of the strategic objectives."

7) Using models that are ill-suited to organizational reality

Macedo-Soares and Neves dos Santos (2001) conducted an exploratory study to verify the methodologies employed by 21 large hospitals in Brazil to implement strategies to put in place client-oriented improvements. They found that the main reason why each hospital had its own methodology was the incompatibility of the available methodologies and the hospital's culture. They concluded that "the methodology ought not to be generic, but specific to the hospital's context" (MACEDO-SOARES and NEVES DOS SANTOS, 2001, p.14). Therefore, they developed a project of a generic model for hospitals to implement their quality improvement strategies in accordance with the specific reality of these organizations. This is in line with the statement of Goldsmidt (2003), who, when referring to Balanced Scorecard implementation, stated that one of the model's core points is its adaptability to the specific features of each organization's strategy. Whittington (2006) agreed in the sense that, when referring to the

systemic perspective in strategy, to which his work is linked, he challenged the universality of any strategic model.

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4 FINAL THOUGHTS

This article presented the empirical evidence of the main barriers and facilitators to the implementation of strategies at organizations in Brazil. Although research on the subject is still incipient, there are considerable results regarding the subject, which is important for strategy studies and still calls for research. Strategy was treated as a social practice, conducted by constantly interacting individuals within the organizations. Regarding the results presented, the authors sought support for their findings in the national and international literature, in order to analytically verify the explanatory power of the approaches used. The guidelines of this study were the notion of strategy as a social practice, although thoughts and concepts developed by other authors and schools of thought provided much support for the findings, indicating that they are valuable for the strategy field and that they are not incompatible with the predominant line of thinking of the studies conducted.

Surprisingly, research at very different organizations, with highly distinct strategies and the use of various different theoretical and methodological approaches, encountered the same barriers and facilitators. The limitation of this study, however, is that the results presented cannot be generalized. However, they can become hypotheses for future studies.

It is also interesting to note that certain factors that constitute barriers for some organizational strategies are actually facilitators for others. This only emphasizes further the theoretical perspective used in this study. Strategy is a social practice conducted within organizations in a social context and executed by individuals that interact during the course of their daily activities and practices. Thus, depending on how the strategy is implemented in practice, facilitators in one organization may constitute barriers elsewhere, depending on how the strategic practices and their activities are conducted in each organization. The effectiveness of the models, tools and even of the organizational structures depends on the contextualized social practice in which they are used. These questions are intriguing, but they can help us to understand slightly better the complexity

of implementing strategies at organizations in our country.

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