



Strategic Realization in Pluralistic Organizations: The Roles of Top Management and Middle Management

Realização Estratégica em Organizações Pluralistas: Papéis de Alta Administração e Média Gerência

Implementación Estratégica en Organizaciones Pluralistas: Roles de la Alta Dirección y de la Gerencia Media

 10.5020/2318-0722.2025.31.e16614

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Abstract

This article investigates how different hierarchical levels participate in and interact during strategy execution in a pluralistic organization characterized by the coexistence of multiple logics and value criteria. The study adopts a qualitative, longitudinal approach, combining participant observation with semi-structured interviews conducted with members of top management, middle management, and the core team across several cycles of strategic planning and implementation. The findings indicate that strategy realization depends on effective articulation between hierarchical levels, with middle management acting as the key link that translates, adapts, and negotiates meaning between strategic directives and organizational practices. The analysis reveals the coexistence of prescribed and emergent roles that are reconfigured in response to organizational tensions and legitimacy demands. Different mental models related to prioritization, learning, and decision-making are also identified. Their convergence improves the quality and consistency of organizational outcomes, although at a higher temporal cost. The article contributes empirical evidence showing how broader managerial participation in pluralistic contexts supports more coherent and inclusive strategy formulation and execution processes. It also demonstrates that integration between top and middle management is essential for balancing stability and adaptation. Theoretical and practical implications reinforce the importance of structures and routines that foster strategic dialogue across organizational levels.

Keywords: middle management, top management, participation, pluralistic organizations.

Resumo

Este artigo investiga como diferentes níveis hierárquicos participam e interagem na execução da estratégia em uma organização pluralista, caracterizada pela coexistência de múltiplas lógicas e critérios de valor. O estudo foi conduzido por meio de uma abordagem qualitativa, de natureza longitudinal, combinando observação participante e entrevistas semiestruturadas realizadas com membros da alta administração, média gerência e equipe nuclear ao longo de vários ciclos de planejamento e implementação estratégica.

Os resultados evidenciam que a realização da estratégia depende da capacidade de articulação entre níveis hierárquicos, sendo a média gerência o elo que traduz, adapta e negocia sentidos entre diretrizes e práticas. As análises revelam a coexistência de papéis prescritos e emergentes, que se reconfiguram conforme as tensões organizacionais e as demandas de legitimidade. Identificam-se, ainda, diferentes modelos mentais associados à priorização, à aprendizagem e à tomada de decisão, cuja convergência favorece a qualidade e a consistência das entregas, ainda que com maior custo temporal. O artigo contribui ao evidenciar, de forma empírica, como a participação ampliada de gestores em contextos pluralistas sustenta processos de formulação e execução mais coerentes e inclusivos, e ao demonstrar que a integração entre alta e média gerência é condição essencial para equilibrar estabilidade e adaptação. As implicações teóricas e práticas reforçam a importância de estruturas e rotinas que favoreçam o diálogo estratégico entre diferentes níveis da organização.

Palavras-chave: média gerência, alta administração, participação, organizações pluralistas.

Resumen

Este artículo investiga cómo diferentes niveles jerárquicos participan e interactúan en la ejecución de la estrategia en una organización pluralista, caracterizada por la coexistencia de múltiples lógicas y criterios de valor. El estudio se llevó a cabo mediante un enfoque cualitativo, de carácter longitudinal, que combinó observación participante y entrevistas semiestructuradas realizadas con miembros de la alta dirección, la gerencia media y el equipo núcleo a lo largo de varios ciclos de planificación e implementación estratégica. Los resultados evidencian que la realización de la estrategia depende de la capacidad de articulación entre los niveles jerárquicos, siendo la gerencia media el eslabón que traduce, adapta y negocia significados entre las directrices y las prácticas. Los análisis revelan la coexistencia de roles prescritos y emergentes, que se reconfiguran en función de las tensiones organizacionales y de las demandas de legitimidad. Asimismo, se identifican distintos modelos mentales asociados a la priorización, al aprendizaje y a la toma de decisiones, cuya convergencia favorece la calidad y la consistencia de los resultados, aunque con un mayor costo temporal. El artículo contribuye al evidenciar, de manera empírica, cómo la participación ampliada de los gestores en contextos pluralistas sustenta procesos de formulación y ejecución más coherentes e inclusivos, y al demostrar que la integración entre la alta dirección y la gerencia media constituye una condición esencial para equilibrar la estabilidad y la adaptación. Las implicaciones teóricas y prácticas refuerzan la importancia de estructuras y rutinas que promuevan el diálogo estratégico entre los distintos niveles de la organización.

Palabras clave: gerencia media, alta dirección, participación, organizaciones pluralistas.

There has been a growing movement among organizations to adopt participatory practices and include individuals from different hierarchical levels in the strategy formulation process, particularly those in middle management (International Institute for Management Development [IMD], 2021; Folha de S. Paulo, 2005; Forbes, 2021).

In the academic literature, this phenomenon has been examined for many years through studies investigating the simultaneous roles of top management and middle management in the strategy process (Raes et al., 2011; Mantere & Vaara, 2008; Heyden et al., 2017; Castañer & Yu, 2017; Weiser et al., 2020; Vaz, Raes & Heyden, 2022). Traditionally, members of top management were viewed as the primary actors responsible for defining long-term intentions and organizational outcomes (Hambrick, 1981; Raes & Van Vlijmen, 2017). However, Wooldridge, Schmid & Floyd (2008) emphasized the growing importance of middle managers, who function as a link between senior executives and other actors inside and outside the organization. In this context, middle management becomes a critical foundation for strategy formation (Vaz & Bulgacov, 2018; Tarakci et al., 2018; Splitter, Jarzabkowski & Seidl, 2021).

The absence of middle management participation in strategy formulation does not necessarily represent a dysfunction within organizations. However, it is increasingly recognized that limited involvement of middle managers can negatively affect planning quality and create challenges during strategy implementation (Westley, 1990; Floyd & Wooldridge, 2000; Mantere & Vaara, 2008; Canales, 2013; Mack & Szulanski, 2017; Tavella, 2021). Participation is defined as a set of structures, practices and processes that enable lower-level managers to engage and collaborate in strategic work (Laine & Vaara, 2007; Mantere & Vaara, 2008). While participation refers to expanding stakeholders' contributions to decision-making, inclusion involves creating and sustaining a stakeholder community that interacts and remains engaged in a continuous flow of issues within the strategy process (Quick & Feldman, 2011).

In pluralistic organizations, broader stakeholder participation in strategy formation is commonly observed (Denis, Langley & Rouleau, 2007). In such contexts, managerial practices that include or exclude participants may be associated with specific communication mechanisms related to "giving and taking responsibility". These mechanisms can produce different participation patterns, such as persistent exclusivity, in which all actors except top management are excluded, and fluctuating inclusion, in which managers are alternately included and excluded at different stages of the strategy process (Tavella, 2021).

Pluralistic contexts are increasingly present in organizations engaged in various forms of collaborative arrangements (Denis, Lamothe & Langley, 2001). This trend is associated with several factors, including the growing value placed on professional diversity and multiple knowledge bases, as well as the emergence of organizational structures

characterized by shared managerial roles, divergent objectives, diffuse power and distributed work processes (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006; Denis, Langley & Rouleau, 2007; Cuccurullo & Lega, 2013).

Within such environments, pluralistic organizations face the challenge of managing the coexistence of multiple sets of assumptions associated with different institutional logics (Mir, Rezaia & Baker, 2020). Managers must strive to achieve a state of interdependence in which organizational arrangements and strategy creation reinforce one another. This requires developing practices that address diverse objectives while recognizing the interests and identities of multiple organizational groups (Jarzabkowski & Fenton, 2006). Strategy processes in pluralistic organizations may also lead to an “escalation of indecision”, in which individuals and groups repeatedly make, undo and remake decisions, resulting in significant expenditure of time and energy without producing meaningful strategic action (Denis et al., 2011). Consequently, developing strategies in pluralistic organizations represents a significant managerial challenge (Pascucci & Meyer, 2013).

This study aims to contribute to the literature by examining how participatory practices influence strategy processes involving both top management and middle management in pluralistic contexts. To achieve this objective, the study draws on research addressing middle management participation in strategy formulation (Westley, 1990; Floyd & Wooldridge, 2000; Mantere & Vaara, 2008; Canales, 2013; Mack & Szulanski, 2017; Burgelman et al., 2018; Tavella, 2021), particularly within pluralistic organizational settings (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006; Denis, Langley & Rouleau, 2007; Denis et al., 2011; Cuccurullo & Lega, 2013; Pascucci & Meyer, 2013; Lavarda, 2020; Sorsa & Vaara, 2020; Mir, Rezaia & Baker, 2020; Tavella, 2021).

This article is structured as follows. Section 2 presents the theoretical framework addressing i) the interaction between top and middle management, ii) the participation of middle management in the strategy process and iii) strategic participation in pluralistic organizations. Section 3 describes the methodology. Section 4 presents and discusses the results. Section 5 outlines future research agendas followed by the final considerations.

Theoretical Framework

The theoretical framework positions this study along three interconnected dimensions: the interaction between top management and middle management in strategy execution, the participation of middle managers in the strategizing process, and the specific characteristics of pluralistic organizations, where multiple logics and value criteria coexist. Building on these foundations, two explanatory lenses guide our empirical interpretations. The first is role theory, which clarifies how prescribed and emergent expectations shape managerial work throughout the strategy execution cycle. The second concerns managerial mental models, which orient attention, interpretation and decision-making under conditions of ambiguity. By integrating these perspectives with the contemporary strategy-as-practice approach, this section develops the conceptual framework that links managerial activities to strategic outcomes, specifying the mechanisms that connect strategic intent with realization and identifying the conditions under which integration between hierarchical levels generates value for the organization.

Interaction Between Top Management and Middle Management in Strategy

The interface and interactions between top management and middle management in the strategy process have increasingly become the focus of a growing body of research. Recent studies highlight the relevance of examining these relationships in greater depth (Mantere & Vaara, 2008; Raes et al., 2011; Heyden et al., 2017; Castañer & Yu, 2017; Vaz, Raes & Heyden, 2022). Traditionally, responsibility for strategy and organizational performance was largely attributed to top management (Hambrick, 1981; Raes & Van Vlijmen, 2017). However, middle management gradually gained attention in the literature, particularly following early contributions by Bower (1970) and Burgelman (1983), and later through the comprehensive literature review conducted by Wooldridge, Schmid & Floyd (2008). These authors emphasized the importance of middle managers as a critical link between top management and the broader organizational base.

Wooldridge, Schmid & Floyd (2008) argue that further research is needed to understand why some middle managers become more actively involved in and influential within the strategic process than others. This question had received limited attention in earlier studies. Their central premise is that middle management can significantly influence the strategic process, either by improving decision quality or by increasing the efficiency of strategy implementation. As a result, middle managers should no longer be viewed merely as followers or information transmitters but rather as key actors in strategy formation.

At the same time, the conceptual distinction between top management and middle management can be ambiguous, particularly regarding the definition of middle management. The meaning of these roles often depends on the scope and complexity of the organization as well as its structural configuration (Castañer & Yu, 2017). To address this issue, Castañer & Yu (2017) provide clearer definitions. They define top management as individuals who belong to the organization's board of directors or executive committee and who are directly involved in final managerial decision-making. In contrast, middle managers are those who are not part of these executive bodies but who hold responsibility for supervising lower-level managers. These definitions are adopted in this study to ensure conceptual clarity and analytical consistency.

Despite the apparent dichotomy between perspectives emphasizing the central role of top management and those highlighting the influence of middle management, the quality of strategic decisions and their implementation depends fundamentally on the interface between these two groups (Raes et al., 2011). This interface fulfills two essential functions: detecting discontinuities in the external environment and managing forces that promote both stability and change. In doing so, it enables organizations and their strategies to adapt and evolve over time (Raes et al., 2011). In other words, a more participatory approach from top management combined with stronger engagement from middle management tends to enhance the quality of both strategy formulation and implementation processes.

At the same time, top management continues to play a decisive role in shaping strategic renewal choices and actions. Strategic leaders must interpret complex information and balance seemingly conflicting organizational interests in environments that are often turbulent and uncertain. Under such conditions, top executives may attempt to exert greater influence over middle management. Conversely, middle managers may become reluctant to engage fully in strategy processes if they perceive that their contributions are undervalued or ignored (Raes & Van Vlijmen, 2017).

Increasing the involvement of middle management in strategic renewal processes through their participation in strategy formulation is therefore both essential and feasible. One key mechanism for fostering such involvement involves moving away from the traditional top-down approach and toward a more collaborative structure in which top management actively engages middle managers in the co-creation of strategy. This approach aims to strengthen commitment and participation among these actors (Raes & Van Vlijmen, 2017).

Participation in the Strategy Process

The participation of organizational actors in strategic decision-making has become an important topic in strategy research (Tavella, 2021). Participation is generally understood as a process aimed at increasing stakeholders' contributions to decision-making, emphasizing their perspectives regarding organizational programs and policies (Quick & Feldman, 2011). These conceptualizations of participation are adopted in the present study.

Members of top management may sometimes deliberately restrict the participation of middle managers in order to retain control over strategic content, unilaterally defining strategic directions that others must follow (Laine & Vaara, 2007; Mantere & Vaara, 2008). However, the absence of participation among middle managers often leads to dissatisfaction, particularly when these actors perceive themselves as excluded from strategy processes (Westley, 1990) and from strategy development more broadly (Floyd & Wooldridge, 2000). Such exclusion may ultimately prove demotivating, inefficient and costly for organizations (Westley, 1990). Although some degree of exclusion may be unavoidable, the extent to which it occurs varies across organizations, indicating that both exclusion and its negative consequences can potentially be mitigated (Westley, 1990).

When middle managers are included in strategy processes, they may experience either energizing or de-energizing effects in relation to strategic issues. Westley (1990) identifies three possible conditions. The first is exclusion, which occurs when top management resists engaging in dialogue with middle managers, when strategic discussions remain restricted to senior leadership, when formal and informal channels for cross-functional communication are absent, and when no dominant ideological perspective guides the organization. The second condition is inclusion, which arises when middle managers participate in strategic discussions, when these discussions extend beyond top management, when formal and informal mechanisms support cross-functional dialogue, and when the organization operates under a shared ideological orientation. The third condition is sustained energy, which occurs when a balance exists among internal elites and when the organization is not strongly driven by a single ideological orientation. In other words, middle managers may be either included or excluded from "strategic conversations," yet inclusion alone does not necessarily guarantee satisfaction or engagement.

One justification frequently presented in the literature for expanding participation in strategy concerns the role of consensus within top management teams. Greater consensus may facilitate the timely and successful implementation of strategic decisions (Wooldridge & Floyd, 1990). While consensus can strengthen commitment and positively influence implementation outcomes, it may also reduce the speed of strategic processes (Dooley, Fryxell & Judge, 2000). In this sense, the relationship between effectiveness and slower implementation in highly committed teams suggests that achieving high-quality execution often requires more time, which may ultimately reduce the speed of strategic processes.

Participatory and inclusive approaches to strategy can take different forms depending on organizational context (Mack & Szulanski, 2017). Decentralized organizations, for example, tend to benefit more from inclusive practices during the phase of generating strategic alternatives. In such contexts, decision rights are more widely distributed among stakeholders rather than concentrated exclusively at the corporate level. In contrast, highly centralized organizations may still engage broader stakeholders in the strategy process, but this typically occurs through specific participatory mechanisms, and the level of transparency in decision-making tends to remain lower than in decentralized settings (Mack & Szulanski, 2017).

Strategic Participation of Managers in Pluralistic Organizations

Pluralistic contexts — characterized by diffuse power, divergent objectives and knowledge-based work processes (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006; Denis, Langley & Rouleau, 2007; Cuccurullo & Lega, 2013) — are becoming increasingly common in contemporary organizations. This trend reflects the growing diversity of internal interests and identities as well as the complexity of external demands faced by organizations (Jarzabkowski & Fenton, 2006). As pluralism increases, members of top management and middle management often face greater difficulty in interpreting organizational contexts and making strategic decisions due to cognitive challenges, complex social interactions and emotionally demanding environments (Cuccurullo & Lega, 2013). Despite these challenges, pluralistic contexts offer valuable opportunities to better understand contemporary management practices. Nevertheless, this field of research remains relatively recent and still underexplored (Lavarda, 2020).

Pluralistic environments are marked by diffuse power structures and divergent goals, which create distinctive dynamics in processes of deliberate strategic change (Denis, Lamothe & Langley, 2001; Jarzabkowski & Fenton, 2006).

Strategic change processes in pluralistic environments involve three levels of integration or coupling that must occur for strategic objectives to be achieved. The first is strategic coupling, which occurs between top management and middle management within the leadership team. The second is organizational coupling, which connects these leadership actors with their organizational constituencies. The third is environmental coupling, which links the leadership team to the broader external environment of the organization (Denis, Lamothe & Langley, 2001).

Understanding the concepts of organizing and strategizing is essential for addressing pluralism within organizations (Jarzabkowski & Fenton, 2006). According to Jarzabkowski & Fenton (2006), organizing refers to the creation and use of structural practices and coordination processes by internal stakeholders to establish shared identity, culture and collective interests. Strategizing, in turn, refers to the practices and processes related to planning, resource allocation, monitoring and control through which strategy is developed and implemented. In pluralistic contexts, multiple organizational actors, including members of top management and middle managers, must enable the organization to respond to diverse and sometimes contradictory external demands.

The relationship between organizing and strategizing in pluralistic contexts can be understood through three modes of association: interdependent, destructive and imbalanced associations (Jarzabkowski & Fenton, 2006). These associations derive from the tensions inherent in pluralistic organizations, the tensions embedded in pluralistic strategies and the interdependence between organizing and strategizing processes.

When organizations face strong pressure to accommodate multiple internal identities and cultures while simultaneously responding to competing strategic demands, the potential for pluralism becomes particularly high. Examples of such contexts include universities and health care systems (Jarzabkowski & Fenton, 2006).

In pluralistic organizations, the processes of strategy formulation and implementation involve the challenge of integrating heterogeneous objectives, reconciling diverse preferences and reducing conflict among stakeholders (Pascucci & Meyer, 2013). Even before strategy development begins, one of the central challenges lies in integrating objectives that are often conflicting. This occurs because pluralistic organizations, such as universities and hospitals, frequently operate under decision-making processes influenced by competing interests from groups that possess sufficient power to legitimize their objectives within the organization (Pascucci & Meyer, 2013).

Consequently, both top management and middle managers face significant cognitive challenges when engaging in strategy processes in pluralistic contexts. They must simultaneously address multiple objectives and stakeholder expectations, a task that becomes even more complex in environments characterized by rapid technological change, intense competition and regulatory constraints (Cuccurullo & Lega, 2013).

Finally, the attribution and justification of managerial responsibilities may be influenced by how managers interpret their activities. These interpretations shape how responsibility is assigned and may allow other managers to influence such assignments. As a result, the expressions and discursive practices used by managers at particular moments continuously shape and reshape patterns of participation across the organization (Tavella, 2021).

Role Theory

Role theory provides a useful lens for understanding how expectations, norms and boundaries of action shape behavior during strategy execution. In managerial contexts, roles carry expectations transmitted by “role senders” (e.g., top management) and interpreted by “role receivers” (e.g., middle managers). These expectations may generate or resolve role ambiguity and role conflict depending on the extent to which they align with organizational contexts and ongoing strategic routines (Anglin, Kincaid, Short & Allen, 2022). In pluralistic organizations, where multiple logics, interests and sources of legitimacy coexist, managing such expectations becomes even more critical for coordinating priorities, reducing friction and supporting the delivery of results. Role theory therefore helps explain why the same strategic directive may lead to different execution patterns when role occupants interpret and perform their responsibilities under distinct pressures and audiences.

Recent developments in the strategy-as-practice (SAP) literature complement this perspective by clarifying what makes an activity strategic. Seidl, Ma & Splitter (2024) propose four views for identifying strategic activities: relevant

consequences, labeling as “strategic,” authorship by “strategists” and patterned recurrence. These views help position the role-related work of managers within the broader set of activities that effectively shape strategy. When applied to the interface between top and middle management, this perspective suggests that the role of middle managers extends beyond translation. Middle managers also contribute to the co-production of meaning and to the development of patterns of action that, over time, stabilize or redirect strategic intentions.

Recent empirical evidence further shows that implementation activities carried out by middle managers can differentiate between intended and unintended outcomes. Some repertoires of activities increase the likelihood that strategies will be implemented according to their original design, whereas other repertoires tend to generate adaptive deviations (Christie & Tippmann, 2024). In pluralistic contexts, this implies that role design and reinforcement should consider which activities effectively produce strategic consequences under multiple institutional logics.

In interorganizational settings, role performance also structures relationships with external actors and influences future decisions. Relational stances and reciprocal expectations between buyers and suppliers, for example, form a “role field” that accumulates over time and affects future demand allocation. Criteria such as relational characteristics, product or service attributes, supplier capabilities and relational posture interact to guide allocation decisions (Silva & Resende, 2025). For research and practice in strategy execution, this suggests that internal role design and external role governance are complementary mechanisms that jointly shape decision trajectories over time.

Recent studies also show that the activities of middle managers vary depending on whether strategies are intended or emergent, affecting both the frequency and type of implementation interventions (Christie & Tippmann, 2024). In parallel, the SAP literature has revisited what qualifies an activity as strategic, offering a framework to distinguish actions with strategic consequences from supporting routines (Seidl et al., 2024). These developments refine our categorization of managerial roles and help explain why certain roles gain prominence at specific stages of the strategy cycle.

Managerial Mental Models

Managerial mental models are cognitive representations that structure how leaders perceive environments, infer causal relationships and choose decision rules. A broad scoping review shows that managerial mental representations (including mental models, schemas, mindsets, and related constructs) function as filters and action maps that guide attention, interpretation and choice, with direct implications for performance variation across firms (Becker et al., 2025). In pluralistic organizations, where multiple institutional logics compete for attention, mental models act as mechanisms of alignment or friction. They shape how signals are selected, how complexity is simplified and how assumptions are stabilized to enable coordination. Consequently, sustained performance changes often require altering dominant mental models rather than merely providing additional information.

Recent research has moved beyond conceptual definitions toward methods for eliciting and influencing mental models. Hackman et al. (2024) show that eliciting individual perceptions of complex projects reveals structural differences in mental models among teams and stakeholders. These differences can be addressed to foster double-loop learning and improve decision-making. In parallel, studies in managerial education indicate that business simulations can promote conceptual shifts in managers’ mental models, influencing decision heuristics and improving decision quality (Palmunen, Lainema & Peltó, 2021). These findings suggest that strategy execution programs benefit from explicit routines designed to make mental models visible, comparable and adjustable, such as causal mapping workshops, decision narratives, and assumption testing.

Another important point of convergence emerges in the literature on innovation and digital transformation. The deliberate development of managerial mental models oriented toward innovation, accompanied by associated behavioral repertoires, facilitates the adoption of new routines and capabilities. This is particularly relevant in contexts where organizations seek ambidexterity between exploration and exploitation (Paula et al., 2023). When this cognitive perspective is integrated with the contemporary strategy-as-practice framework, the focus of strategic execution expands beyond designing processes and performance metrics to include continuous work on the mental models that sustain strategic activities (Seidl et al., 2024). In pluralistic organizations, this implies aligning role governance (who performs which activities) with model governance (the assumptions and criteria guiding those activities), thereby reducing the risk of misalignment between strategic intent and execution.

Two recent streams of research help operationalize mental models within strategy execution. First, a 30-year review of managerial mental representations standardizes terminology and proposes a research agenda for the field (Becker et al., 2025). Second, evidence shows that individual perceptions in complex projects can capture and align the mental models of teams and stakeholders (Hackman et al., 2024). Together, these contributions support the use of mental models as an explanatory mechanism for prioritization, decision-making and sensemaking within strategy processes.

Methodology

To achieve the objectives of this study, a qualitative methodological approach was adopted. This choice reflects the need for a detailed and context-sensitive understanding of the research problem, as well as the importance of capturing the environment in which participants operate (Creswell, 2014). It also considers the relevance of social relationships in increasingly pluralized spheres of life (Flick, 2008). A single case study strategy was selected due to its suitability for investigating a specific phenomenon in depth and for developing a comprehensive understanding of the research context (Creswell, 2014). In addition, this research is classified as exploratory, as it aims to expand knowledge about the object of study (Gil, 2017).

The case study began with the identification of a specific organizational context: a well-established institution in the executive education sector in Brazil. The purpose was to understand how members of top management and middle managers enact strategy within a pluralistic organization (Creswell, 2014). An exploratory design was employed to enhance familiarity with the research problem and to make it more explicit (Gil, 2017).

Data collection in qualitative research involves obtaining access and permissions, defining an appropriate sampling strategy, developing procedures for recording information and addressing ethical considerations that may arise during the research process (Creswell, 2014). In this study, formal permission to access the organization was requested and granted. This authorization was formalized through an academic research confidentiality agreement, a standard procedure in this type of research. Data collection took place between 2020 and 2021.

During the data collection process, a set of interrelated activities was conducted to generate rich and relevant information aligned with the research question, allowing for an in-depth understanding of the case (Creswell, 2014). In qualitative research, data are typically derived from field activities such as interviews, observations and the collection and examination of materials (Yin, 2016). Accordingly, this study employed multiple data collection methods, including semi-structured interviews, informal discussions and document analysis.

Semi-structured interviews were the primary data collection method, with an emphasis on a narrative approach that allowed participants to freely describe their perspectives. Interviews were conducted via the online communication platform Zoom and lasted approximately 60 minutes each. All interviews were audio and video recorded with prior consent and subsequently transcribed verbatim for analysis. An interview protocol composed of open-ended and broad questions was used to elicit responses aligned with the research objectives (Yin, 2016; Stake, 2011).

Participants were selected based on predefined sampling criteria aligned with the research objectives (Creswell, 2014). A purposive sampling strategy was adopted to identify informants capable of providing rich and relevant data for the study (Yin, 2016). The sample included members of top management, middle managers and, additionally, specialists who are part of the technical team supporting the organization's strategy process, referred to as the "core team" (Table 1).

Table 1

Profile of interviewees

Interviewee	Position/role	Hierarchical level	Interview duration (minutes)
E1	Executive director of strategy and planning	Top management	65
E2	Director of operations	Top management	60
E3	Administrative and financial director	Top management	70
E4	Strategic projects manager	Middle management	55
E5	Operations units manager	Middle management	50
E6	Organizational development manager	Middle management	60
E7	Controllershship manager	Middle management	45
E8	Communication and culture manager	Middle management	50
E9	Technical support manager	Middle management	55
E10	Processes and quality manager	Middle management	50
E11	Strategic planning analyst	Core team	40
E12	Project analyst	Core team	35
E13	Human development specialist	Core team	45
E14	Operations analyst	Core team	35
E15	Internal strategy consultant	Core team	40
E16	Planning coordinator	Core team	45

Source: Prepared by the authors (2025)

The purpose of this exploratory single case qualitative study was to obtain a sample composed of three members of the executive board (top management), six members of executive management (middle management) and four members of the core team. The research design established, at a minimum, the inclusion of participants from top management, middle management and the core team through purposive and snowball sampling. This approach ensured heterogeneity of roles and proximity to strategic decision-making processes. Sampling targets were defined to enable comparisons across hierarchical levels and to support the triangulation of findings.

Discussion of Results

This section presents and discusses the evidence that emerged from the data analysis regarding how members of top management and middle management enact strategy in a pluralistic organization. The analysis allows for an understanding of strategy realization over time, shaped by the manifestation of managerial mental models and roles as appropriate theoretical lenses for interpreting the emergent analytical categories, as well as the observed outcomes of strategy formulation and implementation between 2019 and 2021. The study ultimately interviewed three members of top management, seven middle managers and six members of the core team, exceeding the initially planned sample. This expansion is relevant because it increases the diversity of perspectives and strengthens the reliability of the identified patterns, particularly in comparisons between top and middle management and in triangulation with the core team.

From the emergence of mental models as a key explanatory lens for the observed phenomenon, the first mental model identified in the data refers to strategy as learning. This perspective frames strategy practice as a process of experimentation and organizational development. On the one hand, the strategic process functions as a pilot application of a methodology that guides managerial thinking and control, fostering experimentation that refines management practices. On the other hand, it creates opportunities and rituals for organizational development, serving as a lever for enhancing the capabilities of both top management and middle management and thereby improving the quality of strategic processes in subsequent cycles.

Within this learning-oriented mental model, the analytical category of organizational development became visible in the second half of 2019. During this period, a group of middle managers used the autonomy granted to them to engage with top management in discussions about existing management practices, particularly decision-making processes. This mental model became even more evident during the strategy formulation phase in 2020, when middle managers actively participated while simultaneously developing their competencies in the context of a succession process oriented toward more strategic roles within the organization.

The analysis also identified the emergence of a second category associated with the learning mental model, namely experimentation. This dimension became evident from the fourth quarter of 2019 with the introduction of a new methodology, referred to as “agile.” This methodology was intended to guide how individuals think about and control strategy execution, while also functioning as an internal laboratory for potential inclusion in the organization’s product portfolio. The novelty of the methodology required both top management and middle managers to study it in depth, thereby creating a learning environment for these actors. This process became more pronounced in the second half of 2019 and continued through its implementation in the following year.

The experimentation dimension was closely associated with managers’ expectations of achieving a strategy process characterized by simplicity and agility. In particular, middle managers expected to fulfill their role by committing to the strategy process and implementing the intended strategy under these conditions. However, after the first two quarters of the formulation of the 2021-2025 strategic plan, it became evident that the results diverged from expectations. The adoption of the agile methodology, driven by the learning mental model, generated excessive bureaucracy. This included an increase in meetings, a high volume of documentation and excessive communication. These factors appeared to create work overload and slow down the strategy process.

At the beginning of 2020, a second mental model became more clearly observable, referring to strategy as empowerment. This perspective reflects the presence of cognitive guides that orient how managers in this pluralistic organization think and act strategically. As a result, this model fosters broad participation by middle management in strategy formulation and supports the development of competencies associated with managerial empowerment.

The empowerment mental model was linked to the role expectation of top management as narrative builders. This role emphasizes the importance of top managers constructing and disseminating narratives, a shared expectation among many members of the organization. These actors recognize that the founder’s visionary discourse (focused on ambition, customer orientation, and service excellence) serves as a reference that top management is expected to uphold and pursue. Since the beginning of the strategy process in the second half of 2019, top management used strategy formulation events to build narratives grounded in the founder’s discourse while adapting them to the organization’s current context in response to market dynamics.

At the same time, it was possible to observe the expectations and enactment of the middle management role of commitment to the strategy process. This role was associated with the empowerment mental model, as reflected in how these individuals engaged in collaboration, proposed projects and initiatives and participated actively in the

development and finalization of the strategic proposal submitted to top management in October 2020. This involvement contributed to generating internal support for the intended strategy.

The empowerment mental model was also associated with the role expectation of top management as a source of legitimacy. In this role, top managers act as a bridge between middle management and higher institutional bodies during the strategy formulation process. During the first three quarters of 2020, top management engaged in discussions with middle managers to co-develop strategy while simultaneously seeking endorsement and approval from higher organizational instances for the proposed strategic directions.

A third mental model identified in the analysis relates to strategy as decision-making, characterized by multiple choices and prioritization. This model reflects, on the one hand, the autonomy of middle managers to engage in multiple strategic choices and, on the other hand, the need to prioritize among proposed projects and initiatives. This dynamic is consistent with interorganizational findings showing that present relationships influence and reanchor future decisions (Silva & Resende, 2025).

The first category associated with this mental model refers to multiple choices. This dimension became more visible during the formulation of the strategic proposal in 2020. The broad range of choices available within predefined strategic pillars (executive education, academic education, and social initiatives) stemmed from both top management's and middle managers' understanding of strategy practice, as well as from the autonomy granted to these actors.

The second category relates to prioritization and was associated with the role expectation of top management as an arbitrator among initiatives. During the deliberation of the formulated strategy in the first quarter of 2021, this role expectation was not fulfilled, despite middle managers anticipating such arbitration.

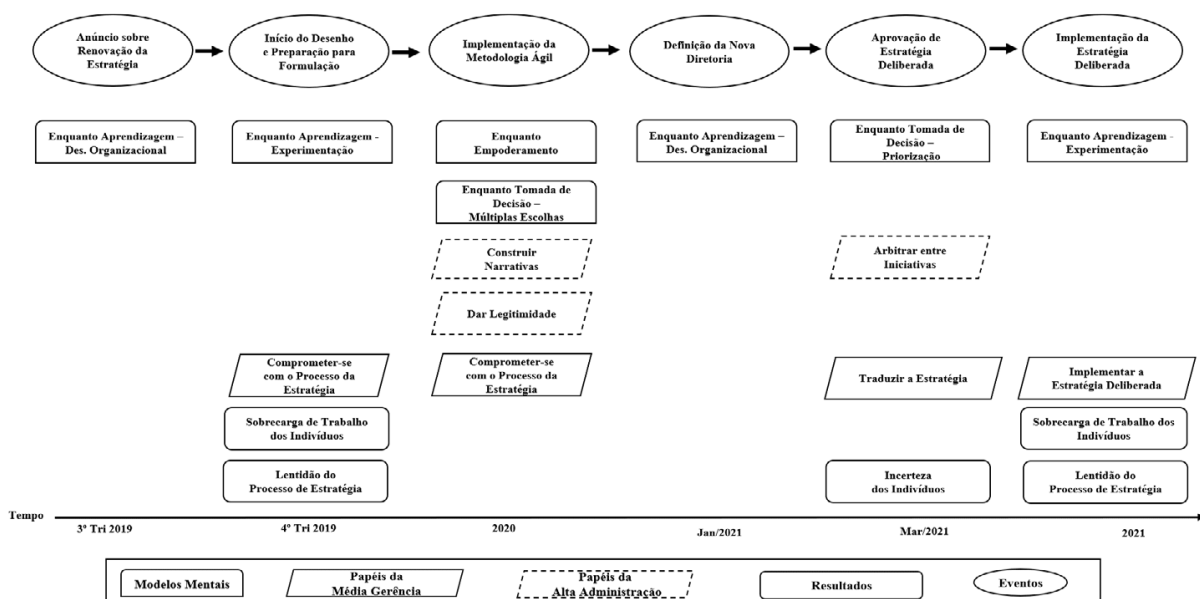
As a result, the presentation of the intended strategy without clearly defined priorities appeared to generate role conflicts during the implementation phase beginning in the second quarter of 2021. In particular, the absence of top management's role as an arbitrator conflicted with middle management's role expectations of translating and implementing the intended strategy.

Following the formal approval of the strategy in March 2021, it became evident that the lack of prioritization associated with conflicting role expectations between top management and middle management produced several negative outcomes. These included work overload, uncertainty among individuals and delays in the strategic process. These effects emerged because middle managers did not have sufficient time, personnel or financial resources to implement all approved projects and initiatives and had not received clear prioritization guidelines for resource allocation.

Figure 1 synthesizes the analytical dimensions and emergent categories that structure the observed strategy execution process. It organizes the three identified mental models (learning, empowerment, and prioritization/decision) and connects them to the roles performed by top management and middle management, such as translator, sponsor and mediator. The figure highlights when and how these roles are activated across different phases of the strategic cycle, including presentation, approval, deployment and resource allocation. By integrating these elements, the figure illustrates how variations in roles and mental models explain both convergence and tension between hierarchical levels, as well as differences in the quality and pace of strategy implementation.

Figure 1

Strategy process in a pluralistic organization (timeline)



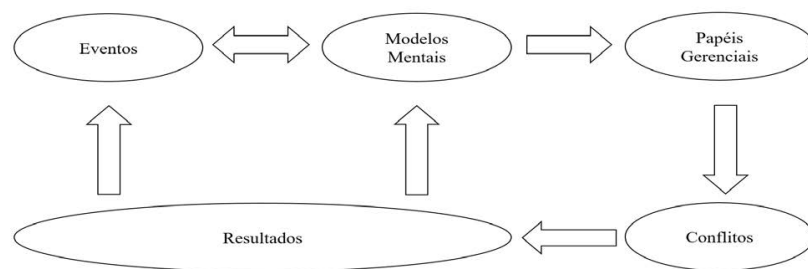
Source: Prepared by the authors (2025).

In line with recent evidence from the Brazilian context, opening the strategy process and engaging multiple actors reinforces cycles of sensemaking and sensegiving and improves alignment between intended strategy and emergent practices (Rodrigues et al., 2024). It is also useful to anchor the analysis in a practice-based studies perspective to clarify who does what, using which artifacts and at which moments it becomes necessary to reconfigure the strategy process (Junges et al., 2023).

Figure 2 presents the dynamic model of the strategy process in a pluralistic organization derived from this study. The diagram integrates cognitive, role-based and activity-based flows: i) deliberate formulation and communication; ii) sensemaking and sensegiving by middle management; iii) prioritization and allocation of initiatives; iv) execution and monitoring; and v) feedback loops that adjust strategic guidelines and mental models over time. The model highlights points of friction and coupling between top management and middle management, showing how interdependencies and pluralistic pressures shape the transition from strategic intent to realization.

Figure 2

Strategy process in a pluralistic organization (dynamic model)



Source: Prepared by the authors.

Overall, the findings indicate that events influence managerial mental models, which in turn shape managerial roles. These roles may enter into conflict, thereby affecting strategic outcomes. Finally, outcomes appear to feed back into both mental models and subsequent events, reinforcing or reshaping the strategy process over time.

Theoretical Implications

The findings of this study contribute to several theoretical streams. First, they extend the literature on strategic change in pluralistic organizations, building on prior work by Jarzabkowski & Fenton (2006), Denis, Langley & Rouleau (2007), Denis et al. (2011), Lavarda (2020), Sorsa & Vaara (2020), and Tavella (2021). These studies provide insights into how top management and middle management think and act in strategy processes, highlighting the emergence of different managerial mental models in such contexts. The present study advances this discussion by showing how these actors address choices and prioritize projects and initiatives throughout the strategy process.

The results also reinforce the importance of middle management participation in strategy formulation within pluralistic organizations. This is consistent with prior research by Westley (1990), Floyd & Wooldridge (2000), Laine & Vaara (2007), Mantere & Vaara (2008), Canales (2013) and Tavella (2021), which emphasize the influence of mental schemas and role expectations of middle managers on organizational strategic outcomes.

These findings contribute to theoretical advancement by demonstrating how interactions among organizational actors, their perceptions, mental models and role expectations shape the strategy process in pluralistic contexts.

The study also contributes to role expectation perspectives within the strategy process literature, particularly in pluralistic settings. This perspective has been explored by authors such as Biddle (1986, 2013), Daniels & Bailey (1996), Floyd & Lane (2000), and Kauppila (2014). The findings show how mental models can influence the emergence of role conflicts in these contexts.

For example, when top management does not fulfill its role of arbitrating among competing strategic initiatives, conflicts may arise with middle management's role of implementing the intended strategy. Such ambiguity or lack of clarity in roles can generate tensions and difficulties during implementation.

Thus, the findings help explain how role expectations, mental models and interactions between top management and middle management influence both the development and implementation of strategy in pluralistic organizations. This contributes to a deeper understanding of the challenges faced by managers in such contexts and offers relevant insights for the strategy process literature.

The study also contributes to the literature on middle management by providing insights into organizational development and strategy formulation processes. This is consistent with prior research by Wooldridge, Schmid &

Floyd (2008), Mantere & Vaara (2008), Raes et al. (2011), Heyden et al. (2017), Castañer & Yu (2017), and Vaz, Raes & Heyden (2022).

One important contribution concerns the preparation of managers for organizational succession processes, which represents a relevant dimension of organizational development. In addition, the findings contribute to the literature on pluralistic organizations by showing how strategy processes can evolve simultaneously with methodological experimentation.

This experimentation may produce unintended negative effects on strategy formulation. For example, excessive bureaucracy may slow down the strategy process, which can hinder the organization's ability to adapt quickly to environmental changes.

Overall, the findings contribute to advancing knowledge in the areas of middle management, organizational development, strategy formulation in pluralistic organizations and methodological experimentation, offering relevant insights for both theory and managerial practice.

Practical Implications

The findings of this study have important practical implications. One of the central insights is the need for clear prioritization and decision-making within the strategy process. The absence of clear decisions may generate conflicts in role expectations between top management and middle management, leading to work overload and uncertainty among organizational members.

Thus, a key implication is that top management should actively seek to reduce or mitigate such negative effects during the strategic deliberation process. This can be achieved through clear and transparent communication, explaining strategic choices and the rationale behind them, thereby aligning expectations and reducing uncertainty.

It is also important for top management to remain attentive to middle management's expectations regarding its role as an arbitrator among initiatives. When these expectations are not met, individuals may experience overload and uncertainty, which can negatively affect performance and the effectiveness of strategy implementation. Therefore, top management should remain open to dialogue and available to clarify strategic decisions, fostering mutual understanding and collaboration.

In summary, the practical implications highlight the importance of clarity in strategic decisions, effective communication and alignment of expectations between top management and middle management. These elements contribute to reducing conflict, work overload and uncertainty, thereby creating a more favorable environment for strategy implementation and the achievement of organizational objectives.

The findings also suggest that they can support middle managers operating in pluralistic contexts similar to the one studied (Cuccurullo, 2013), enabling more accurate interpretation of strategy and more effective implementation. At the same time, they may assist top management in understanding and managing middle management's expectations regarding prioritization in the implementation process, thereby avoiding an escalation of indecision (Denis et al., 2011).

Finally, the study offers insights into the potential positive and negative effects of middle management participation in strategy formulation within pluralistic contexts (Westley, 1990; Floyd & Wooldridge, 2000; Mantere & Vaara, 2008; Canales, 2013; Mack & Szulanski, 2017; Tavella, 2021), particularly in terms of commitment to the strategy process.

Final Considerations

This study contributes to the literature by examining strategy realization in a pluralistic organization, providing insights into how members of top management and middle management think and act in the strategy process through different mental models and role expectations, as well as how these elements influence strategic outcomes. From a practical perspective, the study highlights opportunities to reduce role conflicts associated with intended strategy in pluralistic contexts and demonstrates how top management can mitigate potential negative outcomes such as work overload and uncertainty arising from role conflicts.

This study has several limitations that should be acknowledged. First, it is based on a single organization, which limits the generalizability of the findings to other pluralistic contexts and requires cautious interpretation. Second, the time frame of the study may not have been sufficient to fully capture longer-term organizational development following strategy formulation, indicating the need for longitudinal research. Third, the study was conducted during a period of deliberate strategic change combined with broader organizational transformations, which may have influenced the depth of interview data.

As promising directions for future research, we encourage scholars to expand knowledge on the strategy process in pluralistic contexts. The increasing prevalence of pluralism in organizations (Lavarda, 2020) provides additional motivation for such efforts. In this regard, studies that integrate managerial mental models used in strategy formation with their resulting impacts may enhance understanding of pluralistic environments. Further research examining the simultaneous development of organizational processes and strategy formation in pluralistic organizations may also contribute to advancing this field. Moreover, strategic ambiguity in pluralistic settings represents an important topic for

further investigation. Finally, additional studies should examine the strategy process across different organizational contexts characterized by pluralism.

The findings of this study also suggest the need to deepen understanding of how operational management, middle management, and top management interact when organizations rely on forward-looking projections and analyses. A first research agenda involves longitudinally mapping who initiates, legitimizes and sustains decisions across different time horizons, including short-term adjustments and longer-term renewal efforts. This approach should examine how attention and resource allocation vary across hierarchical levels and across stages such as definition, prioritization and monitoring. Relevant questions include when middle management acts as a bridge between strategic directives and operational routines, how operational management translates guidance into procedures and when top management reanchors priorities and based on which forms of evidence.

A second line of inquiry focuses on the dynamics of roles across hierarchical levels. This includes examining how prescribed roles and roles that emerge in everyday work alternate throughout the execution cycle and how these dynamics affect both the quality and pace of outcomes. Process-oriented studies combining analysis of meeting records, observation of monitoring routines and wave-based interviews may reveal shifts among roles such as translator, mediator, sponsor and priority setter, as well as how these shifts contribute to reducing friction in pluralistic contexts.

A third research agenda concerns the cognitive work required for alignment across levels. Future studies may investigate the extent to which mental models across functions and hierarchical levels converge or diverge when organizations incorporate information about trends and uncertainties. They may also examine how practices aimed at making assumptions explicit, such as causal mapping, decision narratives and hypothesis testing, influence alignment between strategic intent and realization. Key questions include which assumptions prove critical for enabling decisions, how they are revised and which interaction formats promote interpretive convergence without suppressing productive disagreement.

A fourth line of research addresses the governance of initiative portfolios without introducing new theoretical labels. This includes examining how prioritization criteria, decision-making rhythms and stage-gate mechanisms influence the balance between incremental improvements and renewal initiatives, as well as the stability of commitments over time. Quasi-experimental designs using small pilot interventions, such as adjustments to prioritization criteria or review cycles, may help estimate their effects on decision time, replanning rates and execution quality.

From a methodological perspective, future studies may adopt longitudinal designs embedded across organizational units, incorporating documented decision trails, managerial reflective diaries, content analysis of management artifacts and periodic measures of cognitive alignment. Such approaches enable process-based analyses and, where feasible, multilevel modeling to capture cross-level effects. Overall, future research should address how managerial levels coordinate, when each level becomes critical and under which assumptions decisions evolve over time, providing actionable evidence for designing routines that preserve continuity while enabling renewal.

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How to cite:

Monteiro, E. O., Vaz, S. L., & Silva, A. C. (2025). Strategic Realization in Pluralistic Organizations: The Roles of Top Management and Middle Management. *Revista Ciências Administrativas*, 31, 1-16. <https://doi.org/10.5020/2318-0722.2025.31.e16614>

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Received on: 12/22/2023.
Accepted on: 11/14/2025.