

# Middle Managers in Strategic Processes and Practices: Evidence from a Brazilian Manufacturing Company

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## Abstract

**Purpose** – Strategic renewal (SR) is a process involving beliefs, actions, and learning that helps organizations adjust their strategy in response to environmental changes. This study explores how middle managers (MMs) influence SR through their roles in strategy implementation.

**Theoretical framework** – Using intraorganizational ecology theory, this study examines MMs' contributions through the processes of variation, selection, and retention. MMs were involved in planning and executing cycles, using lean practices, and engaging in the ongoing development of strategic initiatives.

**Design/methodology/approach** – A longitudinal qualitative study was conducted at a Brazilian manufacturing firm over ten years (2012-2022), including 125 semi-structured interviews with MMs involved in strategic workshops and lean-based practices. The study examines SR across four phases: professionalization, recognition, depression, and resumption.

**Findings** – MMs are key to both executing existing strategies and driving SR. They mediate between top-down directives and emergent strategic needs, helping align initiatives with formal structures. MMs contribute to SR through mechanisms such as reducing resistance, promoting integration, fostering cognitive development, and supporting organizational learning and adaptation.

**Practical & social implications of research** – The proficiency of MMs in strategic roles enhances SR. The study highlights the importance of MMs in enabling strategic flexibility and offers insights into leveraging middle management for sustainable transformation.

**Originality/value** – This research bridges the gap between strategy implementation and renewal by illustrating how MMs, as enactors and originators of strategic change, influence SR through lean, practice-based interactions.

**Keywords** | Strategic implementation, strategic renewal, intraorganizational ecology, lean, longitudinal study.

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## 1 Introduction

The literatures on strategy implementation and strategic renewal have largely evolved in parallel, respectively treating implementation as the execution of static plans and renewal as an emergent, transformative process (Schmitt et al., 2018). Strategy implementation research has traditionally focused on control mechanisms and alignment systems to ensure adherence to strategic intent, reinforcing a top-down, prescriptive approach (Weiser et al., 2020). Conversely, the literature on strategic renewal emphasizes the need for firms to adapt to environmental changes, often disregarding the mechanisms required to operationalize these changes (Volberda et al., 2001). This artificial separation limits theoretical integration and hinders organizations from effectively managing both stability and change. In fact, strategy implementation and renewal are interdependent. Successful renewal necessitates the enactment of new strategic initiatives, while implementation processes must incorporate adaptive capabilities to sustain long-term strategic relevance (Pedersen et al., 2024).

One way to bridge this artificial division is by examining the role of middle managers (MMs), who enact strategic initiatives while enabling continuous adaptation. MMs serve as critical interpreters of strategic intent, translating top management directives into operational actions (Wooldridge et al., 2008), while also influencing strategic renewal by fostering adaptability and learning (Floyd & Lane, 2000). Their unique position allows them to mediate between top-down mandates and emergent strategic needs, acting as both implementers and originators of strategic change (Monteiro et al., 2025; Huy, 2011). Since contemporary organizations are becoming ever more stakeholder oriented (Rouleau et al., 2015; Fonseca et al., 2025) and more technological, these changes affect middle management roles, processes, and behaviors (Tarakci et al., 2018, 2023). Moreover, their engagement in unintended strategy enactments – where they adapt formal plans in response to contextual demands – further underscores their role in emergent renewal processes (Christie & Tippmann, 2024).

To advance this discussion, we pose the following research question: How do strategic practices and the roles of middle management influence strategic renewal? We adopt the intraorganizational ecology perspective (Burgelman, 1983a, 1991) as our sole theoretical lens, conceptualizing organizations as ecosystems of strategic initiatives competing for attention and resources.

Renewal unfolds through the processes of variation, selection, and retention (V-S-R), in which MMs play a pivotal role by fostering autonomous initiatives, aligning them with formal structures, and mediating between emergent and deliberate strategies (Mirabeau & Maguire, 2014).

To address this research question, we conducted a longitudinal qualitative study of a manufacturing firm with five industrial units, covering the period from 2012 to 2022. The company holds an annual strategic workshop (Roos & Nilsson, 2020) structured around systematic strategic planning cycles and execution monitoring. This workshop is inspired by lean principles – a production system focused on waste reduction (Womack & Jones, 2003) – and engages approximately 35 MMs each year. This empirical setting provides a relevant locus for examining strategic renewal, as MMs are actively involved in co-constructing strategic initiatives through ongoing interaction with top management and frontline employees. Methodologically, we employed a process theory approach (Langley, 1999), integrating 125 semi-structured interviews with MMs who participated in strategic workshops between 2020 and 2022. In addition, we conducted a retrospective, document-based analysis using field-collected materials from 2012 to 2019, enabling us to contextualize the evolution of middle management roles and strategic engagement over time.

By analyzing 28 recurring strategic practice events throughout the study period, we explored how the roles of MMs in implementing strategy influence strategic renewal, shedding light on their agency in shaping and institutionalizing new directions within the organization. This design allowed us to identify four successive phases – professionalization, recognition, depression, and resumption – each marked by distinct behavioral mechanisms that characterize MMs' contributions to renewal. This allowed us to identify four causal flows related to the MMs' role in the strategic renewal practices: reducing resistance and promoting integration, cognitive development and organizational learning, recursive processes and institutionalization, and evolutionary adaptation.

## 2 Theoretical background

The perspective of intraorganizational ecology emerged as an attempt to apply evolutionary reasoning to the analysis of strategic processes within organizations. Building on Burgelman's foundational work (1983a, 1991),

organizations are conceived as ecosystems comprising multiple strategic initiatives that compete for resources and managerial attention, where renewal occurs through the processes of variation, selection, and retention. This framework departs from linear views of strategy formulation and execution by suggesting that organizational evolution results from selective pressures both internal and external to the firm, akin to biological ecosystems but adapted to cultural and institutional dynamics.

Within this framework, Burgelman advanced a pivotal understanding of middle management roles in intraorganizational evolution. In his longitudinal study of internal corporate venturing at Intel, Burgelman (1983b) documented how MMs not only interpreted strategic directives from senior executives, but also initiated and championed projects that initially lay outside the firm's core business domain. For example, MMs often pursued autonomous initiatives in emerging technology areas informally until they demonstrated enough potential to attract resources and recognition at the corporate level. Burgelman (1991) showed that such initiatives could eventually be "selected in" to the formal strategy, thereby reshaping the organization's trajectory. This dual function positions MMs as both guardians of alignment with formal structures and agents of variation, sponsoring emergent projects that challenge prevailing strategic boundaries. By conceptualizing strategy as the outcome of multi-level interactions, Burgelman (1983b, 1991) reframed MMs as catalysts of renewal within the ecology of internal strategic initiatives, establishing a lasting research tradition that continues to shape our understanding of strategy processes.

Building on Burgelman's seminal work, subsequent research extended the intraorganizational ecology perspective to explain how strategic initiatives evolve through the multi-level interactions of managers. Noda and Bower (1996) expanded upon the Bower–Burgelman process model, demonstrating that strategy making in complex firms unfolds as iterated processes of resource allocation. Their longitudinal study showed how early business development results could either amplify or dampen MMs' enthusiasm, influencing top managers' confidence and, consequently, the allocation of resources to new ventures. In this way, MMs emerge as crucial brokers who not only champion initiatives from below but also shape the firm's strategic context by convincing senior executives to reinterpret the organization's strategic intent. Such findings reinforce Burgelman's insight that renewal arises less from deliberate, top-down design and more from the interplay of local

problem solving, political bargaining, and the selective reinforcement of initiatives within the firm's internal ecology.

Later studies further refined this ecological understanding by emphasizing the micro-processes through which MMs' actions sustain or redirect organizational evolution. Salvato (2003) introduced the concept of "core micro-strategies" to describe the routines and resources that anchor organizational adaptation while allowing recombination over time. This perspective underscored that MMs become central agents of evolutionary change by engaging with and reconfiguring these routines. Building on this foundation, Wooldridge et al. (2008) proposed examining MMs' strategic roles through the lens of intraorganizational evolutionary theory, particularly the variation–selection–retention framework. This approach conceptualizes strategic renewal as a dynamic process in which MMs generate ideas (variation), develop initiatives (selection), and integrate new routines (retention). Their work calls for a more holistic understanding of middle management's strategic activity, emphasizing not only the dissemination of existing knowledge, but also the underexplored domain of idea creation and innovation. Mirabeau and Maguire (2014) likewise highlighted how autonomous strategic behaviors initiated by MMs can become embedded as emergent strategies when supported by discursive practices that legitimate them within the prevailing strategic context. Their findings illustrate how MMs not only initiate variation but also actively participate in processes of selection and retention by mobilizing support and manipulating strategic and structural contexts. Together, these contributions extend Burgelman's original ecological view by showing that organizational renewal hinges on MMs' capacity to recombine routines, articulate emergent initiatives, and ensure their institutionalization within the broader ecology of strategic initiatives.

Despite these advances, important gaps remain in our understanding of MMs from an intraorganizational ecology perspective. Much of the existing research has examined relatively short periods of strategic change, focusing on the initiation and initial evolution of independent initiatives (Burgelman, 1983b; Noda & Bower, 1996; Mirabeau & Maguire, 2014). Even longitudinal studies often emphasize episodic processes, such as the emergence and legitimization of individual projects, rather than sustained MM involvement across extended organizational renewal cycles. As Salvato (2003) notes, adaptation is anchored in micro-strategies that evolve over time, yet the ways in which MMs maintain or recalibrate these strategies across long temporal horizons remain underexplored.

This absence is particularly striking given the calls in the literature to better understand how strategy emerges from the continuous interplay of variation, selection, and retention. Our study addressed this gap by investigating MMs' roles in strategic renewal over a decade-long period, offering insights into how their practices accumulate, transform, and stabilize across successive phases of organizational evolution.

### 3 Methodological procedures

#### 3.1 Empirical context

This study focuses on a Brazilian manufacturing company that has been a leader in the packaging industry for over six decades. With a mission to provide protective packaging for durable and consumer goods, the company operates five industrial units across diverse Brazilian regions. It employs approximately 900 individuals, and its workforce reflects a broad educational spectrum, with 63% holding high school diplomas. The company's leadership structure comprises three senior managers, 26 MMs, and 15 frontline leaders, creating a multi-layered organizational hierarchy.

The company's core values emphasize excellence, innovation, and ethical results, which are underpinned by a robust Environmental, Social, and Governance (ESG) strategy. This strategy prioritizes business continuity, valuing its people, and implementing a circular economy. Prior to 2012, the company faced operational challenges, including inefficiencies, contractual fines, and escalating costs. In response, a newly appointed Chief Operating Officer (COO) initiated a strategic shift, empowering middle management to play a more significant role in strategy execution.

The research participants presented a diverse socio-demographic profile, with an almost equal gender distribution (46% female, 54% male) and an average age of 43 years. Notably, the group was highly educated, with 51% holding bachelor's degrees and 43% holding master's degrees, indicating strong intellectual capital within the organization (Supplementary Data 3 – Appendix A: Socio-Demographic Description of Participants, 2022). The average tenure within the company was 13 years, and the average tenure in their current roles was six years, suggesting both stability and experience.

Several key factors drove the selection of this organization. First, since 2012, the company has adopted a participatory strategic approach, actively engaging MMs

and teams in developing collaborative initiatives and results-driven processes. Second, its large-scale, multi-unit structure, spanning Brazil's South (S1, S2), South-east (SE), North (NO), and North-east (NE) regions, presented an opportunity to examine strategic alignment across diverse operational contexts. The potential for divergent strategic behaviors to arise from its complex hierarchical structure was also a key consideration. Third, the company's status as an industry benchmark and numerous national and international awards in areas such as sustainability, workplace excellence, and innovation provided a compelling context for the study. Finally, one of the researcher's prior industry experience and access as a participant observer offered unique insights and facilitated in-depth data collection.

#### 3.2 Research design and data collection

We conducted a longitudinal qualitative study in the organization between 2012 and 2022. Adopting an exploratory approach, the research combined a retrospective analysis (2012-2019) with a real-time investigation (2020-2022). The study examined the role of MMs in strategic renewal, focusing on strategy processes and practices, particularly in the context of lean implementation.

Our research draws on the intraorganizational ecology perspective to conceptualize strategic renewal as an evolutionary process characterized by the mechanisms of variation, selection, and retention (Burgelman, 1983a, 1991). Within this framework, MMs play a pivotal role by generating and championing autonomous initiatives, shaping the strategic and structural context, and facilitating the integration of selected projects into the formal strategy (Noda & Bower, 1996; Salvato, 2003; Wooldridge et al., 2008; Mirabeau & Maguire, 2014). We therefore examine their contribution to renewal not as a set of discrete roles, but as practices situated in an ecology of competing initiatives, where MMs act simultaneously as interpreters of strategic intent, sponsors of emergent initiatives, and brokers of organizational adaptation over time.

A multi-method qualitative approach was employed for data collection, including 125 semi-structured interviews with MMs (Supplementary Data 4 – Appendix B: 2020 Operations Meeting Questionnaire; Supplementary Data 5 – Appendix C: 2021 Operations Meeting Questionnaire; Supplementary Data 6 – Appendix D: 2022 Operations Meeting Questionnaire) during strategic workshops (2020-2022). Interviews were conducted via electronic forms to ensure confidentiality.

Two in-depth interviews with an external consultant and seven additional interviews with MMs were conducted to deepen our analysis and understanding about MMs' roles in strategic implementation (Supplementary Data 7 – Appendix E: 2022 Consultant Interview – 10 years of the Operations Meeting; Supplementary Data 8 – Appendix F: 2022 MMs Interview – 10 years of the Operations Meeting).

To explore the historical evolution of strategic practices from 2012 to 2019, we conducted a retrospective documentary analysis. This involved systematically examining archival materials, such as internal presentations, strategic plans, photographs, videos, newsletters, and sustainability reports, as well as A3 documents. A3 is a problem-solving and reporting methodology emphasizing five key performance dimensions: delivery, quality, cost, morale, and safety (Shook, 2008). These documents were selected based on their relevance to strategic initiatives and organizational change processes.

The analysis followed a qualitative content analysis approach, guided by thematic coding. We identified recurring patterns, strategic themes, and shifts in managerial discourse over time. This process enabled us to reconstruct the trajectory of strategic renewal and contextualize the role of MMs within broader organizational transformations.

The retrospective analysis was crucial for establishing a longitudinal perspective, allowing us to compare past strategic practices with those observed during the interviews conducted from 2020 to 2022. It provided a foundational understanding of how strategic implementation evolved, which enriched the interpretation of interview data and supported triangulation. Although interview content is more prominent in the presentation of results, the document analysis served as a contextual anchor, validating and deepening the insights derived from the MMs' narratives.

Three researchers participated in the data collection and analysis process, allowing for triangulation and reflexivity throughout the study. One researcher acted as a participant observer, collecting data directly in the field. A second researcher held regular monthly meetings with the field researcher to discuss observations, interpretations, and emerging themes, fostering critical reflection and minimizing individual bias. After the data collection phase, a third researcher joined the project to independently analyze the data. Coding was conducted iteratively and collaboratively, with discussions among the researchers to ensure consistency in interpretation.

Although no formal intercoder reliability metric was applied, any discrepancies were discussed until a consensus was reached, thereby enhancing the credibility and rigor of the analysis.

### 3.3 Data analysis

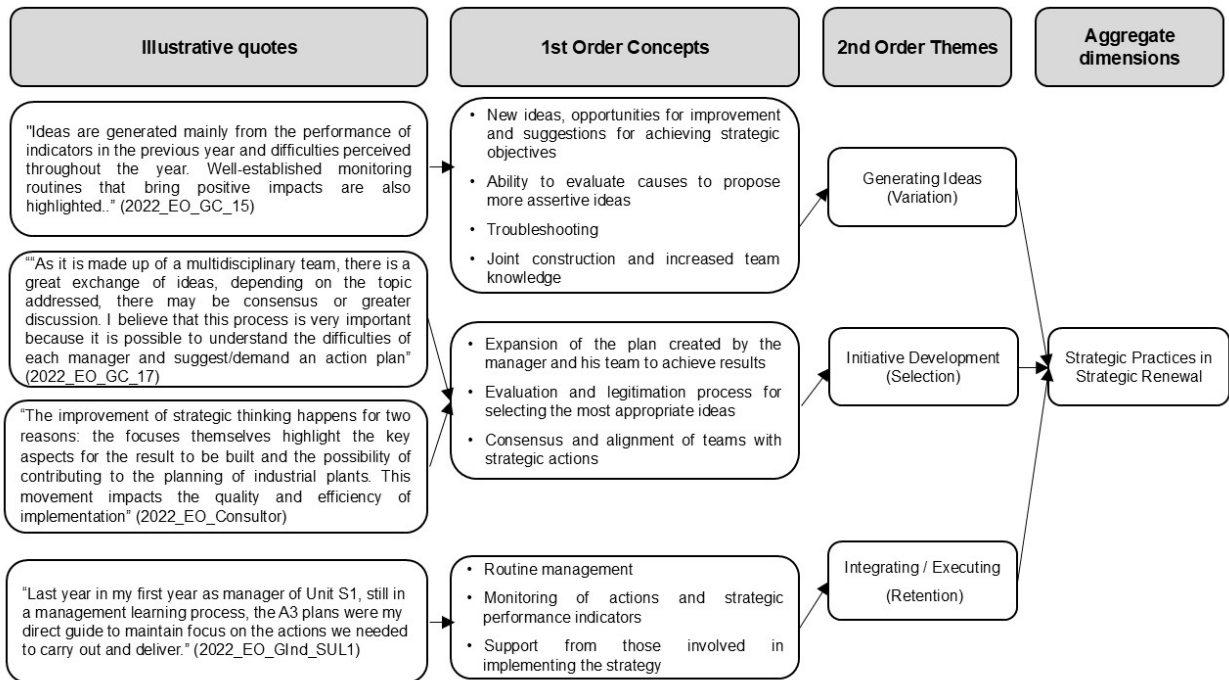
We employed a qualitative, inductive approach, using coding and thematic analysis (Gioia et al., 2013). We conducted an iterative analysis in ATLAS.ti (version 22.1.5) to reveal patterns and themes regarding strategic renewal and middle management roles. Initial open coding of interviews and documents focused on identifying informant-driven expressions and narratives (Supplementary Data 1 – Database – ATLAS.ti\_Codification\_Answers). This phase sought to understand how strategic renewal elements were articulated and enacted by MMs. This first-order analysis, closely aligned with the informant language, resulted in a substantial volume of initial categories. Subsequent analysis involved refining and consolidating these categories to develop higher-order themes.

The second stage of the coding process entailed refining and grouping the initial concepts into second-order categories by seeking similarities and differences among them. This process aimed to reduce the number of categories to a more manageable amount. In this study, we organized the second-stage categories around the evolutionary mechanisms of intraorganizational ecology: variation, selection, and retention (Burgelman, 1983a, 1991). Thus, practices related to generating and sponsoring autonomous initiatives were grouped under variation; those linked to legitimizing, developing, and securing resources for initiatives were grouped under selection; and those associated with embedding, institutionalizing, or stabilizing initiatives within organizational structures were grouped under retention (Noda & Bower, 1996; Salvato, 2003; Wooldridge et al., 2008; Mirabeau & Maguire, 2014). The data were then aggregated into higher-order themes representing the core dimensions of strategic practices in strategic renewal, paying particular attention to how MMs influenced these evolutionary processes over time (Supplementary Data 2 – ATLAS.ti output – ATLAS.ti\_net\_relation\_MM.docx).

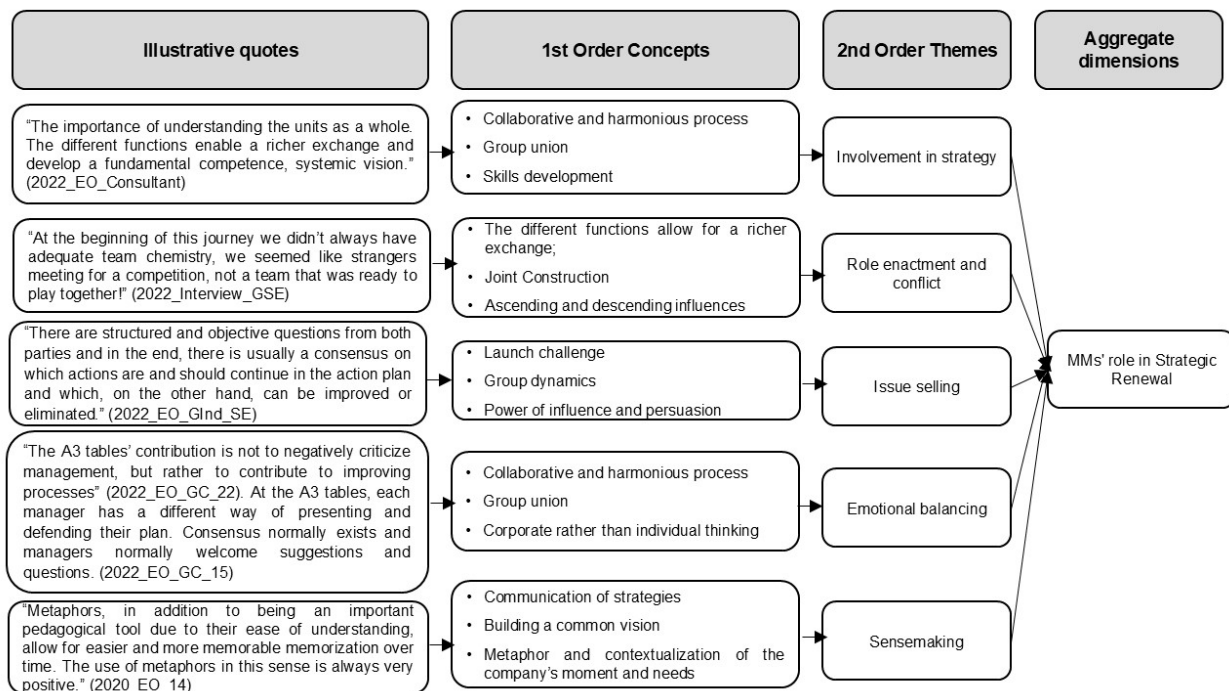
To ensure coding reliability, interpretations were cross-validated among authors through discussion. We mapped the data using informant quotes linked to first-order concepts and aggregate dimensions (Figures 1 and 2) and structured the findings using a narrative approach (Langley, 1999), emphasizing temporal evolution.

Quotes are identified using a coding system in brackets that denotes the year, source, job, industrial unit, or internal newsletter (e.g., [2013\_EO\_Consultant]). In the phase

narratives below, each quote is presented as evidence of a specific MM role and interpreted in relation to the corresponding causal flow and V-S-R subprocess.



**Figure 1.** Data structure and representative quotes underlying concepts and themes of strategic practices in the strategic renewal aggregate dimension



**Figure 2.** Data structure and representative quotes underlying concepts and themes of MMs' implementation roles in the strategic renewal aggregate dimension

We constructed a timeline (Figure 3) using a visual mapping strategy (Langley, 1999) of 28 key events. For clarification, our conceptualization of “event” is grounded in the third definition of process proposed by Van de Ven (1992), which views a process as the progression or development of events over time toward an outcome. From this perspective, an event is not merely a discrete occurrence, but a meaningful change that contributes to the unfolding of a broader organizational trajectory (Langley, 1999). The visual mapping of events supported the identification of temporal patterns, which is key to developing process theory, and enabled us to distinguish four phases across the longitudinal trajectory: professionalization (2012-2013), recognition (2014-2015), depression (2016-2020/1), and resumption (2020/2-2022). We analyzed how MMs influenced the evolution of strategic workshops over time, identifying the causal flows discussed in Section 5.

### 4 Results

In this section, we present the selected quotes, first-order concepts, second-order themes, and aggregate dimensions (Gioia et al., 2013) identified during the analytical process. Together, these dimensions offer a comprehensive framework for understanding how

strategic practices (Figure 1) and middle management implementation roles (Figure 2) influence strategic renewal.

Figure 3 illustrates the evolution of strategy processes and practices at the strategic workshop (SW), depicting 28 summarized events that repeat in cycles throughout the years. Before 2012, industrial units faced instability, including contractual fines, low productivity, and safety issues, as shown in performance records. These strategy practice events and other significant events are numbered in Figure 3 and explained in the following sections.

#### 4.1 Professionalization phase (2012-2013)

In 2012, the board initiated a professionalization process (2), hiring executives for the top management team (TMT), including a new COO (3). The COO introduced the strategic map and Balanced Scorecard (BSC) (4), defining five strategic dimensions: delivery and customer satisfaction, quality, cost control, eco-efficiency, and employee satisfaction (5). MMs were tasked with developing A3 plans that incorporated performance indicators for each strategic dimension (Supplementary Data 9 – Appendix G: Strategic Objectives – Strategic Focus – A3 Roundtables). This was a practice for idea generation (6).

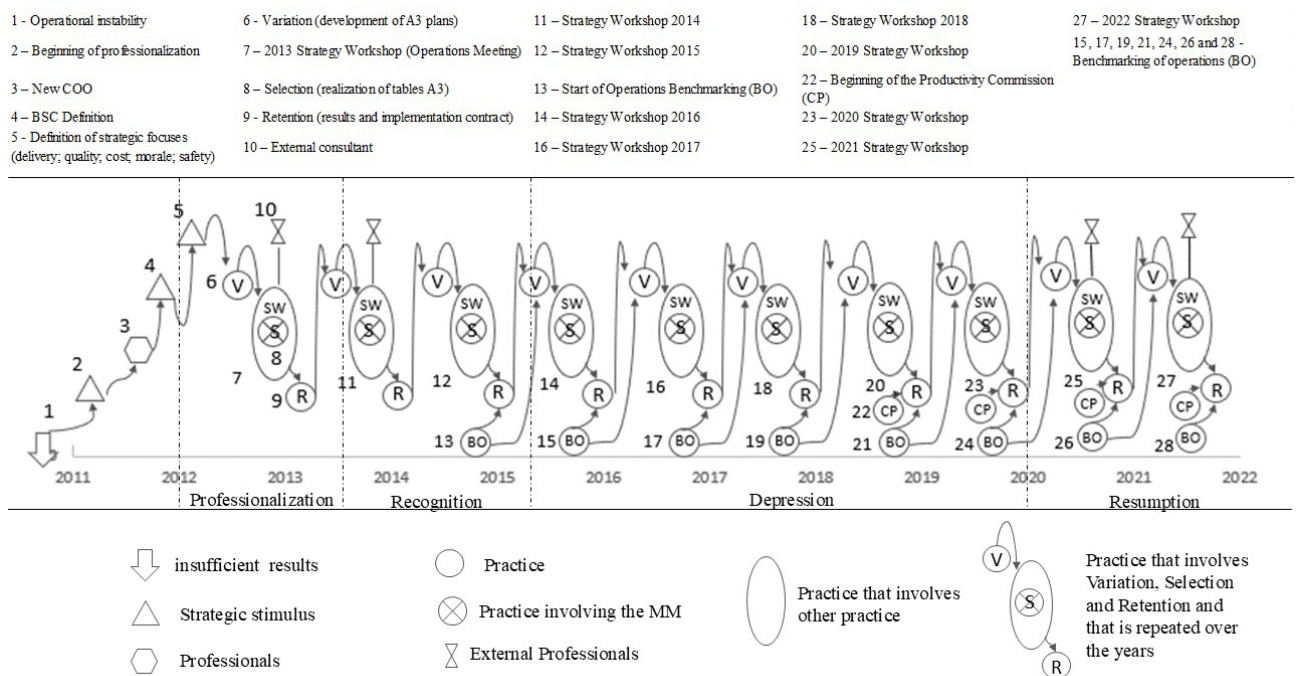


Figure 3. Evolution of strategy processes and practices at the strategic workshop

To institutionalize this process, the COO established the Operations Meeting (OM) (7), an annual strategic workshop where MMs presented their A3 plans (8). The first OM in 2013 featured structured A3 roundtables in which industrial MMs engaged with corporate MMs and experts. The process culminated in “results contracts”, which were signed and monitored throughout the year.

The statements from the semi-structured interviews during this period illustrate the participants’ perceptions of the *strategic renewal process* and its *subprocesses*: (a) *idea generation or variation*, (b) *initiative development or selection*, and (c) *integration/execution or retention*. Here are examples of such statements:

*The participants saw the practice as a ‘moment of renewal’ (2013\_EO\_Consultant).*

*I remember that at the time, with the implementation of the A3 methodology, during the A3 roundtables, managers felt the need to justify the results of the previous year, when in reality the main focus was to plan the upcoming year (2022\_Interview\_GSC).*

*We didn’t have a management tool that supported strategic planning (2013\_JInt\_Mar/Apr).*

Collectively, these reflections illustrate how routine disruption triggered variation and performance scrutiny guided selection, while the absence of formal tools initially challenged the retention of new practices.

The roles of MMs in the strategic renewal processes emerged from the semi-structured interviews. The following statements illustrate these roles:

*In addition to being clear about the direction we’re going this year, the most valuable takeaway from the meeting is the importance of unity for a common objective, which is to achieve the established targets (2013\_JInt\_Mar/Apr).*

This statement illustrates strategic involvement, showing how MMs began to align collective efforts toward organizational goals and reinforce shared commitment.

*It’s clear that the company is going through an important phase characterized by intensified professionalization, efficiency-seeking, and increased interaction between corporate departments and manufacturing units (2013\_EO\_Consultant).*

This exemplifies role definition and conflict management, where MMs navigate new responsibilities and increased interdependence across units.

*The phasing-out of the 1000 machines in favor of European machines was an idea to increase productivity and broke a paradigm throughout the company. It’s no use having cheap molds and low efficiency (2022\_Interview\_GSC).*

This highlights the idea selling role, showing how MMs persuaded leadership to embrace disruptive changes in technology.

*Our start was not easy at all! A mix of fear, respect, but also anxiety and great concern for the unknown! (2022\_Interview\_GSE).*

This reveals emotional balance, as MMs learned to cope with anxiety and uncertainty in the early phases.

*It seems like the company has regained its spirit. It’s alive again (2013\_EO\_Consultant).*

This reflects sensemaking, capturing how renewal was interpreted as organizational revitalization.

This phase introduced A3 planning and the OM, fostering a results-driven culture and reviving the profit-sharing program. Company documents corroborated these findings:

2012 – The Year of Renewal: *We are taking advantage of these challenges to renew ourselves, redefining our management model, with the definition of the Executive Board, composed of a Superintendency and three Boards, based on a more focused and mature view of the business. Based on our Strategic Axes, we developed our strategic map using the BSC (Balanced Scorecard). Based on the defined objectives, we reviewed our portfolio with focus and targeting important markets for the company. This review led us to readjust processes, manufacturing units, and product launches, which we intend to consolidate in the medium term (Owner’s message – 2012\_SR).*

## 4.2 Recognition phase (2014-2015)

In 2014, the company repeated the OM process (11) from 2013, using the previous year’s A3 plans to evaluate results and identify the causes of any discrepancies. This iterative process aimed to facilitate learning and improve actions for the upcoming year. The external consultant participated again, and the OM adopted a thematic focus for the first time. The 2014 theme was “Mission Given is Mission Accomplished, Always!”, emphasizing commitment and engagement.

In 2015, the method evolved (12), with performance indicators showing significant improvement. A new practice called Benchmarking of Operations (BO) (13) was introduced, recognizing the top three units in each strategic focus area and awarding the “The Best Unit of the Year.” The theme for the 2015 OM was “Olympics”, and the introduction of BO sparked an increased desire among MMs to improve their units’ indicators. This period also saw a restructuring of the team, with some MMs leaving and meetings becoming more focused and efficient.

The interview responses revealed the continued presence of an adaptive strategy in its three subprocesses:

Idea generation (variation): “*We evaluate the results of the past year and propose actions and strategies for the current year*” (2016\_JInt\_Jan/Feb\_86).

Initiative development (selection): “*We’ve evolved with the A3 format. We charted the paths to be taken during the year*” (2016\_JInt\_Jan/Feb\_86).

Integration/execution (retention): “*We count on the participation of the entire operational team, which is dynamic in its actions and project implementations*” (2016\_JInt\_Jan/Feb\_86).

Proposing actions based on results drives variation, while charting strategic paths defines selection, and operational team participation ensures retention.

The semi-structured interviews revealed the roles of MMs in the strategic renewal processes:

Strategic involvement: “*From the Olympics, we learned to have greater discipline, self-confidence, dedication, focus, and persistence to achieve excellence!*” (2022\_Interview\_GSE).

Role definition and conflicts: “*At the beginning of this journey, we didn’t always have proper coordination among peers. We seemed like strangers meeting for a competition, not a team that was synchronized to play together*” (2022\_Interview\_GSE).

This reflects role definition and conflicts, showing the early difficulties of building coordination and team integration.

Idea selling: “*At the tables, each manager has a different way of presenting and defending their plan. Consensus usually exists, and managers generally welcome suggestions and inquiries*” (2022\_EO\_GInd\_SE).

This illustrates idea selling, where managers must defend, negotiate, and adapt their proposals to gain peer acceptance;

Emotional balance: “*As a multidisciplinary team, there’s a great exchange of ideas. Depending on the topic, there can be consensus or more discussion*” (2022\_EO\_GC\_17).

Sensemaking: “*We know that our professionals are competent and make a difference, so we want to further stimulate them and cultivate a taste for continuous improvement and evolution*” (2014\_JInt\_Jan/Feb).

This illustrates sensemaking, as managers framed competence and improvement as part of the company’s evolving identity.

These statements highlight the MMs’ engagement, role dynamics, idea presentation and acceptance, emotional dynamics, and the desire to foster continuous improvement within the organization. Moreover, such reflections highlight how discipline fostered strategic involvement and coordination resolved role conflicts, while effective idea selling and emotional balance enabled the collective sensemaking of a performance-oriented identity.

This phase was also marked by external recognition, including being named one of the best companies to work for in Brazil (*Você S.A.*) and one of the most sustainable companies (*Exame*), along with customer acknowledgments of improved delivery and quality.

MMs’ testimonials can be triangulated with the company owner’s message:

Work and commitment: “*We spread values and consolidate our principles. We provide opportunities for the constant development of our professionals. In addition to being competent, we want people who are proud to be part of the Company’s team. We hold events, such as the Operations Meeting, where leaders met the goals and objectives for 2015 and passed them on to their teams. We clearly communicate what the company expects from its employees and we count on each person’s dedication and commitment. Therefore, as stated in the motto of the Operations Meeting: ‘Mission given is mission accomplished, always’* (Owner’s message – 2015\_JInt\_Mar/Apr\_81).

### 4.3 Depression phase (2016-2020/I)

During this phase, the company continued the OM (14, 16, 18, 20, 23) and BO (15, 17, 19, 21, 24),

as shown in Figure 3. The stages of adaptive strategy were evident, as highlighted by the following statements:

Idea generation (variation): “As unit managers, we observed the teams’ commitment to preparing the A3 plans, always seeking the possible causes and solutions for the indicators” (2020\_EO\_7).

Initiative development (selection): “There was a lot of learning for the manager and the technical areas. The discussions were incisive and relevant. The participation of other technical members this year was very important, as they play an active role in day-to-day operations, and they needed a motivation boost and a deeper understanding of the organizational strategy” (2020\_EO\_3).

Integration/execution (retention): “After careful planning, the challenge is to implement it, either through pilot testing and validation or with certainty of the outcome. My department supports providing solutions to managers’ demands. Using a programming metaphor, my work is like a software function block, where there’s input, processing, and output” (2022\_EO\_GC\_18); “Since the beginning of the operations meeting and consequently the execution of the plans, it was possible to notice a reduction in [product] returns, an improvement in the organizational climate, an increase in productivity, and a strong reduction in costs, as well as a reduction in accidents” (2022\_EO\_GC\_7).

Seeking solutions to performance gaps drives variation, while technical debate refines selection, and realizing tangible outcomes ensures the retention of effective practices.

The MMs took on more responsibilities, with a restructuring that simplified areas and outsourced activities. However, some MMs expressed concerns, and one left for other opportunities. MMs’ implementation roles evolved in the strategic renewal process. The testimonies reveal the evolution of MM’s involvement in the strategic renewal processes:

Strategic involvement: “All important information is shared, so we move in harmony with the managers. We clearly understand the company’s objectives and goals” (2018\_JInt\_Jan/Feb\_98).

This reflects **strategic involvement**, highlighting how information sharing fostered alignment and clarity across units.

Role definition and conflicts: “There was a lot of learning. Many efficient actions presented in one unit can solve problems in other units. This increases commitment and, above all, unity among managers. Everyone working towards the same goal. Everyone helping each other” (2020\_EO\_9).

This illustrates role definition and conflict management, where sharing practices reduced frictions and reinforced collective cohesion.

Emotional balance: “...the contribution of the tables is not to criticize management negatively but to contribute to process improvement” (2022\_EO\_GC\_22).

This illustrates emotional balance, showing how constructive framing of criticism reduced tension and maintained engagement.

Idea selling: “The steam cost was increasing, and we couldn’t reduce it due to the fact that fuel was linked to oil prices. We managed to convince management to invest in a biomass boiler, which brought results beyond expectations” (2022\_Interview\_GCP).

This statement exemplifies idea selling, underscoring the persuasive role of MMs in securing resources for innovative projects.

Sensemaking: “Empowered by the unity of all, I’m confident that we’ll achieve each of these objectives and revitalize our company, which, even in the most challenging times, remains a source of pride for all of us” (2017\_JInt\_Mar/Apr\_93).

This statement reflects sensemaking, framing challenges as a collective journey and continuous maturation. Transparent sharing enhances strategic involvement and collaborative problem-solving clarifies roles, while constructive feedback preserves emotional balance, persuasive argumentation facilitates idea selling, and collective resilience anchors sensemaking.

In this phase, the company also experienced the loss of a major customer at the end of 2015, a fire at the NE unit, and the closure of another unit. The company faced significant challenges, including the COVID-19 pandemic. Despite this, the OM and A3 plans were maintained, and a new practice emerged: the Productivity Committee (22), which met weekly to address productivity issues. These meetings enabled MMs to learn from each other and discuss key challenges.

During this period, the company achieved its best results across various indicators and received external recognition for sustainability, occupational safety, innovation, and management excellence. In 2020, the OM adopted a Star Wars theme, encapsulating the phase with the phrase: “Do or do not. There is no try” (Master Yoda, Star Wars character).

According to external documents, we can triangulate the testimonies of the MMs who were involved in the OM interview:

*Urgent and necessary transformation: By following the routine and conclusions of the 2016 edition of the Operations Meeting, I had confirmation of the importance of these activities for the company. We have a high-performance team, attentive to the collective spirit and new opportunities. We need to be even stronger, win more customers and markets, and find solutions that incorporate more technological advances. Not just meeting demands, but going further, seeking more. Let's join forces and integrate areas so that everything and everyone operates more efficiently. Now is the time. As mission given is mission accomplished, we must make it happen!* (Owner's message – 2016\_JInt\_Jan/Feb\_86).

#### 4.4 Resumption phase (2020/2-2022)

The resumption phase began in the second half of 2020, marked by increased product demand. The same behavioral consultant from the initial phase returned for the 2021 and 2022 cycles. MMs showed proficiency in the practices. The following subprocesses of strategic renewal stood out:

Idea generation (variation): “*One of the major differences of the A3 is that managers involve all areas in developing actions, making the actions authentic and objective*” (2020\_EO\_20).

Selection: “*Understanding market needs, looking within the company, and seeking process improvements that allow for productivity gains and agility in customer service*” (2019\_JInt\_Jan/Feb\_104).

Retention: “*The creation of the Productivity Committee was an idea that enabled more active and integrated management to monitor indicators. We optimized the utilization of manufacturing resources, maximized productivity in all units, reduced costs, and ensured delivery to customers*” (2022\_Interview\_GSC).

Collaborative involvement authenticates variation, while market alignment guides selection, and active monitoring secures the retention of optimized processes. MMs' roles evolved as follows:

Strategic involvement: “*The importance of understanding the overall picture of the units. The different functions enable a richer exchange and develop fundamental competence, the systemic vision*” (2022\_EO\_Consultant).

This demonstrates strategic involvement, emphasizing systemic vision as a competence emerging from sustained participation in strategic workshops.

Definition of roles and conflicts: “*Managers have been coming to the activity more prepared. Occasionally, there are conflicts, some divergences are expressed, while others may remain hidden and unaddressed. I believe that negotiations end up being more restricted due to the high volume of information that managers bring to the meeting*” (2022\_EO\_Consultant).

This statement exemplifies role definition and conflicts, as preparation increased but differences still required negotiation and adjustment.

Selling ideas: “*It's extremely important to have an understanding of the processes and necessary changes to identify the problems that may arise along the way. This moment is recognized by leadership as a starting point. Through this exchange, we find inspiration to exercise the positive leadership that the situation demands of each of us*” (2021\_JInt\_Jan/Feb\_115).

This reflects idea selling, showing how collective persuasion is linked to leadership identity and legitimacy.

Emotional balance: “*A united team, a spirit of helping one another, not shrinking in the face of problems (of which there are many), dedication, and extensive studies to evaluate better resource utilization*” (2021\_BO\_16).

This exemplifies emotional balance, reinforcing resilience and a collective spirit in the face of adversity. Furthermore:

*... There were many emotions! Lots of sweat, tears, meetings, and farewells throughout these years. We moved forward and faced extraordinary challenges together in these more than ten years of the Operations Meeting.*

*Some fellow travelers disembarked to rest, others sought new boats for the journey, but the majority persisted and evolved, becoming seasoned sailors skilled at overcoming challenges!* (2022\_Interview\_GSE).

This demonstrates emotional balance, highlighting perseverance and resilience as key factors in sustaining renewal.

Sensemaking: *“To navigate these turbulent seas, a team spirit is essential. I see our team as constantly evolving, maturing, building together”* (2021\_Int\_Jan/Feb\_115).

Developing a systemic vision enhances strategic involvement, while navigating negotiations clarifies roles. Concurrently, leadership-driven idea selling and emotional resilience underpin the collective sensemaking of a shared evolutionary journey.

This phase saw growth, innovation, and the start of the digital transformation. The 2021 OM (25) was held virtually due to COVID-19, with MMs presenting remotely. MMs from the SE, NE, and NO industrial units defended their plans in remote A3 roundtables. The theme of the 2021 OM was “crossing”, a metaphor for the pandemic.

The 2022 OM (27) marked the return to in-person meetings, and plans began to be created on a digital platform, allowing shared and real-time visualization in a single, integrated system, in line with the company’s digital transformation efforts. Negotiations at the A3 roundtables, selling ideas, and sensemaking continued to evolve, and experienced MMs guided new members through these practices. The BOs of 2020 (26), 2021 (28), and 2022 brought significant improvements in results, as one MM expressed:

*It’s clear how performance indicators have improved a lot over these ten years. Furthermore, the way in which management is deployed, with monthly monitoring of the Monthly Operations Meetings, and even more so, in the meetings of the Productivity Committee. This careful monitoring of plans ensures that we don’t deviate from the planned direction. In this way, we can maintain accurate control over costs, productivity, service, and the setting of targets for consumption of secondary MPs.* (2022\_EO\_GC\_22).

During this period, the company experienced significant growth, with 2021 being the best year in terms of results. The 2022 results set historical records, reinforcing the importance of maintaining practices, even

during a crisis. These testimonies align with the owner’s message in the company newspaper:

*Even in a year as difficult as 2020, the market has helped. Let’s continue to take advantage of opportunities and showcase our strengths as a solution provider with new technologies, new segments, and new investments. We’re moving towards becoming a new company, but the success of any crossing requires a lot of preparation and alignment. It requires cutting costs, productivity, predictability, and, more than anything, always delivering what we promise to our customers. May 2021 be a time of recovery and great achievements.* (Owner’s message – 2021\_Int\_Jan/Feb\_115).

## 5 Discussion

We observed four distinct and successive behavioral mechanisms related to the MM’s implementation roles in *strategic renewal* practices, which we will refer to as causal flows.

### 5.1 First causal flow: reducing resistance and promoting integration

Before the OM and A3 plans, MMs had little *strategic involvement*, and operational instabilities disrupted client relationships. In the Professionalization Phase (2012-2013), new TMT members entered, driving standardization and corporate integration. Some MMs initially resisted due to fears of job loss and adapting to new methodologies and negotiating with peers (Vaz et al., 2025; Van Rensburg et al., 2014) – roles that were not previously required. Others embraced the changes, stating, *“The company regained its soul”* (2013\_EO\_Consultant). The *“MM from the SE unit, with a highly methodical and analytical profile, became extremely excited and felt comfortable with the work tool, method, and analysis”* (2022\_Interview\_GRH).

Roos and Nilsson (2020) emphasize that involving those affected fosters commitment and trust in change processes. In the company, A3 plans (*idea generation*) and A3 roundtables (*selection*) encouraged MMs to propose and sell ideas. One MM noted, *“Diversity is part of the process and promotes learning, acceptance of different viewpoints, and review of certain issues. The event includes people in the decision-making processes, and that reinforces commitment”* (2020\_EO\_23).

An external consultant, an organizational psychologist specializing in leadership, played a key role in MM integration through team-building activities that reinforced trust and collaboration. Psychological safety, which is essential for knowledge sharing (Kahn, 1990), was also crucial. As one MM expressed, “*In addition to being clear about the direction we’re going this year, the most valuable takeaway from the meeting is the importance of unity for a common objective, which is to achieve the established goals*” (2013\_JInt\_Mar/Apr).

MMs had to unlearn an ineffective modus operandi and embrace an unfamiliar approach. This shift corresponds to the second causal flow: cognitive development and organizational learning.

## 5.2 Second causal flow: cognitive development and organizational learning

The process began with familiarization, training, and hands-on learning. One MM recalled, “*I remember that the first meeting took us three days to complete. It was literally the moment of learning by doing*” (2022\_Interview\_GHR). Initial reactions included insecurity and doubts about the model’s viability: “*Presentations were not always properly reviewed and aligned with the local teams, and we would struggle and lose focus during the A3 roundtable discussions*” (2022\_Interview\_GSE).

A3 plans, used for *idea generation*, fostered problem-solving, organizational learning, and an implementation focus. One participant stated, “*It provides a vision for future plans with evaluation and learning from actions previously taken*” (2020\_EO\_10). A3 roundtables, associated with *selection*, enabled *strategic involvement*, *role definition*, *idea selling*, *emotional balance*, and *sensemaking* (Novais et al., 2025). MMs presented proposals, debated them, and learned to accept trade-offs: “*We’d lose focus on objectivity with long and not always sufficiently deep explanations*” (2022\_Interview\_GSE). Over time, A3 roundtables became essential for knowledge creation: “*Reflections and discussions greatly contributed to organizational learning*” (2020\_EO\_6).

The *implementation* phase required *strategic involvement*, conflict management, and adaptation. Initially, MMs resisted: “*We didn’t have a tool to support strategic planning*” (2013\_JInt\_Mar/Apr). Later, this changed: “*Plants carry the legacy and lessons from each meeting, reinforcing commitment with greater emphasis*” (2020\_EO\_14).

This second causal flow integrates strategy formulation and implementation within a learning cycle with feedback and feed-forward mechanisms (Crossan et al., 1999). Both top-down and bottom-up influences emerge (Mintzberg & Waters, 1985), reinforcing “social learning” (Wooldridge et al., 2008). OM practices contribute to knowledge creation, as MMs mediate between conceptual knowledge at the top and operational knowledge at the base (Nonaka, 1994). Organizational knowledge, shaped by shared experiences (Johnson et al., 2011), fosters collaboration: “*Efficient actions from one unit solve problems in others, increasing unity*” (2020\_EO\_9).

Knowledge creation enhances readiness for change when group cohesion and motivation exist. Individual learning transforms into collective learning, reinforcing interaction as a key component of competency development and a “common vision” (Sosa, 2011; Roos & Nilsson, 2020). The OM strengthens individual and group competencies in an environment of challenge and support, which is evident in MM experiences that extend beyond cognition to action.

## 5.3 Third causal flow: recursive processes and institutionalization

In 2013, the adopted practices were institutionalized through cycles of planning, execution, verification, and learning, reinforcing a continuous improvement approach. Lean systematizes the processes of *strategic renewal* (*variation-selection-retention*) as proposed by Burgelman (1991). This practice fosters an adaptive strategy: “*The methodology is cyclical. All learning is recorded and feeds into the next A3*” (2020\_EO\_22).

The three stages of strategic renewal were evident. A3 plans enabled *idea generation*: “*Mapping high-return products helped us negotiate modifications with customers*” (2022\_interview\_GEQ). A3 roundtables facilitated *initiative selection*: “*Specialists improve plans by addressing root causes, generating the greatest gains*” (2022\_EO\_GC\_22). These practices also strengthened *execution*: “*In my first year as manager, A3 plans guided our focus on necessary actions*” (2022\_EO\_GInd\_S1).

Over time, the OM strengthened MM *involvement in strategy*, prompting other departments to adopt A3. Role clarity improved, and conflicts were channeled productively during discussions. Industrial and corporate MMs developed greater empathy while maintaining a results-driven approach: “*Discussions improve plans, always leading to consensus. Integration and respect exist because we share the same goal*” (2022\_EO\_GC\_12).

The ability to *sell ideas* and *sensemaking* evolved, reinforcing *emotional balance* and confidence in the model. Practices became institutionalized as MMs saw tangible benefits. A key sign of institutionalization emerged during the Depression Phase (2016-2020/1), when, despite external crises, MMs maintained the practices, proving their resilience. Had the crisis occurred earlier, the methodology might not have endured.

#### 5.4 Fourth causal flow: Evolutionary adaptation

According to an integrative view of *strategy implementation*, it is a continuous interaction between strategy conceptualization and execution across multiple organizational units simultaneously (Weiser et al., 2020). When practiced, it fosters organizational evolution. This was observed in the organization, as expressed by one MM:

*I've noticed an incredible evolution over these ten years. Currently, we can justify very little because both specialists and unit managers are directly involved with the reality of each plant, allowing us to be assertive in discussing only the necessary actions* (2022\_EO\_GInd\_S1).

Another MM expressed their perspective:

*...all MMs and OM participants, I'm absolutely certain, if they look at the photos from the first meeting today, they'd say with pride, 'What an evolution.' ... The practice of the meetings demanded agility and objectivity, which they developed throughout the meetings and follow-ups* (2022\_Interview\_GHR).

Regarding the four phases (professionalization, recognition, depression, and resumption) designated in the study, a maturation can be seen over the years. Management skills evolved, as reported by one MM, the company's HR manager:

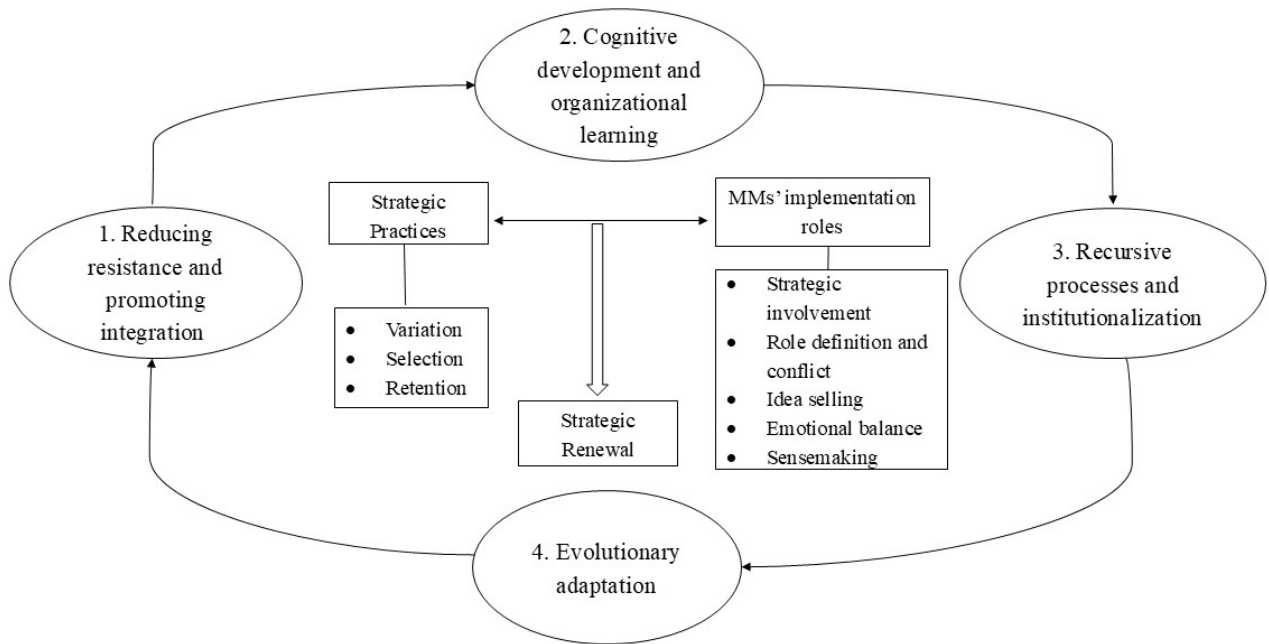
*The evolution of managerial competencies is evident when we observe the managers' proficiency in presenting their projects, their A3 plans, and in the monthly follow-up meetings, where they're able to present their results with authority, identifying the failures, their causes, and improvement opportunities that are mostly identified through the sharing of experiences among units, demonstrating how teamwork promotes learning and individual and collective growth* (2022\_Interview\_GHR).

This study reveals the dynamic interplay between strategic practices and MM's implementation roles in driving

strategic renewal, as analyzed through an intraorganizational ecology framework (variation-selection-retention). Specifically, four causal mechanisms were identified: (1) reducing resistance and promoting integration; (2) cognitive development and organizational learning; (3) recursive processes and institutionalization; and (4) evolutionary adaptation. These mechanisms emerged from the interactive dynamics between strategic practices, MMs' implementation roles, and strategic renewal over time (Figure 4).

Although each causal flow can be analytically distinguished, they are not isolated; rather, they are successive and interdependent. The dynamic illustrated in Figure 4 occurs across all phases of the process. For example, cognitive development (2) reduces resistance and fosters integration (1). As practices become institutionalized (3), organizational learning is reinforced (2), creating the conditions for adaptive evolution (4). Similarly, recursive institutionalization (3), when combined with cognitive learning (2), enables adaptive renewal (4), which in turn lowers resistance (1) by consolidating trust in the process. This recursive and mutually reinforcing logic demonstrates that strategic renewal emerges not from discrete stages, but from iterative cycles in which middle managers continually connect learning, integration, institutionalization, and adaptation.

While this study is based on a single Brazilian manufacturing firm, several mechanisms identified are potentially transferable to different organizational contexts. Figure 4, in particular, illustrates a generic pattern of MMs' contributions to strategic renewal. Organizations must deliberately create conditions for variation-selection-retention cycles to unfold. Providing spaces such as workshops or roundtables, and positioning MMs as legitimate actors "in the game", are mechanisms not bound to culture or sector. Another transferable mechanism is the continuity of executive sponsorship (TMT/board), which protects and legitimizes the practice over time. In our case, this continuity was reinforced by the TMT's/board's unusually stable membership across the decade. Without this sponsorship, institutionalization would likely have faltered. At the same time, the specific sequence of phases observed (professionalization, recognition, depression, resumption) may not be applicable to other contexts, as crises or environmental shocks could occur earlier or later. In such cases, immature practices might not survive, depending on whether leadership is willing to persist despite uncertainty. Thus, while the mechanisms identified are broadly relevant, their trajectory is contingent upon contextual timing and leadership support.



**Figure 4.** Dynamic interplay between strategic practices and MMs' implementation roles in driving strategic renewal

It is also important to note that adaptation does not always lead to positive evolutionary outcomes. In the absence of sustained TMT and board support, practices may be abandoned prematurely, especially if early results are not forthcoming. Political misalignment or conflicting interpretations among executives can also generate paralysis, undermining the continuity of initiatives. In the case we studied, quick operational improvements legitimized the process early on, fostering persistence. Had results been delayed or crises emerged earlier, MMs' efforts could have been curtailed, potentially reverting the organization to its previous *modus operandi*. This highlights the fragile and political nature of strategic renewal, where adaptation may stall or even regress depending on contextual support and timing.

The Depression Phase (2016-2020/1) provides further nuance. Rather than dismantling established practices, crises served as both a stress test and an accelerator. Because routines were already institutionalized, the crisis compelled managers to double down on the very practices that had become the organizational backbone. However, had the crisis occurred earlier, before institutionalization, the same shock could have acted as a filter, eliminating nascent practices and discouraging persistence. In this sense, crises should be understood as contingent events; they accelerate when practices have achieved sufficient

legitimacy and organizational embedding, but filter out when such foundations are weak. This dual nature reinforces the evolutionary analogy of variation, selection, and retention. A cross-case interpretation of our findings suggests that the four mechanisms identified – integration, organizational learning, institutionalization, and evolutionary adaptation – are broadly transferable across organizations. MMs acting as brokers of alignment, facilitators of iterative learning, and agents of routine reinforcement represent generalizable patterns consistent with prior research. However, the way these mechanisms unfolded in our case was shaped by context-specific features, including a long-standing participatory culture, stable leadership teams, and a mature lean system structured around A3 cycles. These contextual elements influenced the depth, speed, and durability of each mechanism. Distinguishing these transferable processes from the particular organizational conditions that enabled them helps clarify how our findings may apply to other settings and indicates where generalization should be approached with caution.

## 6 Conclusion

This study contributes to bridging the artificial divide between strategy implementation and strategic renewal by highlighting the central role of MMs in mediating between stability and change.

Drawing on the intraorganizational ecology perspective (Burgelman, 1983a, 1991), our longitudinal analysis shows that MMs enact strategic initiatives through four successive behavioral mechanisms: (1) reducing resistance and promoting integration; (2) cognitive development and organizational learning; (3) recursive processes and institutionalization; and (4) evolutionary adaptation. These mechanisms illustrate how MMs not only implement formal plans but also actively shape and institutionalize strategic renewal over time.

Using a longitudinal approach from 2012 to 2022, we collected real-time data from 2020 to 2022 and retrospective data, employing a process theory approach (Langley, 1999). The study focused on industrial and corporate MMs engaged in an open, participatory strategic process, structured through lean-based annual Operations Meeting (OM) cycles, which have been evolving since 2013.

By participating in structured strategic workshops and engaging in ongoing interactions with top management and frontline employees, MMs act as translators of strategic intent (Wooldridge et al., 2008) and as agents of adaptability and learning (Floyd & Lane, 2000). Their dual role as implementers and originators of strategic change reinforces the interdependence between execution and transformation (Pedersen et al., 2024), challenging the traditional separation between these domains (Schmitt et al., 2018).

Lean methodologies, particularly A3 plans (structured into delivery, quality, cost, morale, and safety topics), facilitated idea generation and strategic evolution. A3 roundtables aligned with initiative development, while result contracts supported integration and execution. Over the decade, MMs implementation roles evolved, improving their strategic engagement, role definition, conflict resolution, idea promotion, emotional balance, and sensemaking – all of which are key factors in strategic renewal.

Practically, our findings suggest that organizations aiming to sustain strategic relevance should invest in empowering MMs by providing institutionalized spaces for strategic dialog, such as annual workshops (Roos & Nilsson, 2020), and by implementing planning systems that support both alignment and autonomy. As firms become increasingly stakeholder-oriented and technologically complex (Fonseca et al., 2025; Tarakci et al., 2023), the evolving role of MMs demands renewed attention from both scholars and practitioners.

Future research could advance this agenda in several directions. Building on the learning processes observed in A3 cycles, an important question emerges: How does learning transfer occur across organizational units during iterative A3 loops, and which structural or relational mechanisms strengthen or inhibit this transfer? Additionally, crises such as operational disruptions, supply chain shocks, or abrupt technological changes, may act either as accelerators or as selective filters of institutionalization. This motivates another question: Under what conditions do crises amplify the institutionalization of new practices, and when do they instead suppress or reverse emerging routines?

Beyond these issues, future studies might also explore the following: To what extent do board and TMT stability function as necessary conditions for sustaining strategic renewal, and what happens when leadership turnover disrupts continuity? Finally, comparative studies across multiple organizations could test whether the causal flows identified here (integration, learning, institutionalization, adaptation) operate universally or vary across cultural and institutional environments. Together, answering these questions would extend our findings and refine the generalizability of intraorganizational ecology perspectives on strategic renewal.

Despite its single-case limitation, our study makes two key contributions. First, it advances MM perspective theory (Floyd & Wooldridge, 1992; Wooldridge et al., 2008; Huy, 2002; Rouleau et al., 2015; Fonseca et al., 2025) by clarifying how MMs' involvement in strategic practices drives the strategic renewal process. Second, it extends the strategy implementation literature (Weiser et al., 2020; Christie & Tippmann, 2024) by conceptualizing adaptive strategy as an evolving interplay across organizational levels, aligning with broader evolutionary organization studies (Weiser et al., 2020).

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## SUPPLEMENTARY MATERIAL

Supplementary material accompanies this paper.

Supplementary Data 1 – Database – ATLAS.ti\_Codification\_Answers.xlsx

Supplementary Data 2 – ATLAS.ti output – ATLAS.ti\_net\_relation\_MM.docx

Supplementary Data 3 – Appendix A: Socio-Demographic Description of Participants 2022

Supplementary Data 4 – Appendix B: 2020 Operations Meeting Questionnaire

Supplementary Data 5 – Appendix C: 2021 Operations Meeting Questionnaire

Supplementary Data 6 – Appendix D: 2022 Operations Meeting Questionnaire

Supplementary Data 7 – Appendix E: 2022 Consultant Interview – 10 years of the Operations Meeting

Supplementary Data 8 – Appendix F: 2022 MMs Interview – 10 years of the Operations Meeting

Supplementary Data 9 – Appendix G: Strategic Objectives – Strategic Focus – A3 Roundtables

Supplementary Data to this article can be found online at <https://doi.org/10.7910/DVN/3BPPPD>, Harvard

Dataverse V1

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The full data supporting the findings of this study have been made available at:

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**Conflicts of interest:**

The authors have no conflicts of interest to declare.

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