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# Exploring the Roles and Influences of Strategy Management Units (SMUs): An Integrative Review

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## Abstract

The impetus for this review is the gap in the strategic management literature concerning the presence, roles, and influence of Strategy Management Units (SMUs). This review aimed to identify what is known about SMUs, elaborate and synthesize previous findings, identify the theoretical foundation for SMUs, and propose future directions. For this purpose, a step-wise integrative literature review (ILR) is used to assess the existing literature. The framework used in this review is the ADO-TCM (Antecedents-Decisions-outcome and Theories-Context-Methods) approach. Using this approach, it was possible to explicate how theories such as the Resource-Based View could be used to provide explanations in SMU studies. Through a rigorous analysis of extant studies, it was possible to map three central thematic areas of SMU studies, namely: the factors that affect the units' presence and organization, SMUs roles, and the units' influence. The review also enabled us to identify the main roles of SMUs, such as overseeing the strategic management process, strategy formulation, business development, and so on. It is proposed that future studies focus on antecedents of SMUs' presence and roles, the units' impact on several organizational outcomes, as well as the interlink between other related concepts.

## KEYWORDS

strategy management units (SMUs), chief strategy officers (CSOs), resource-based view, strategy as practice (SAP), strategy management professionals (SMPs), strategy process

## Introduction

In recent strategic management studies, the focus on strategy practitioners has increased noticeably. These studies have primarily focused on the roles and influences of the Chief Executive Officer (CEO), Top Management Teams (TMTs), and Board of Directors (BODs) (Barker & Mueller, 2002; Carpenter & Fredrickson, 2001). Studies and theories concerning the upper echelon (Hambrick, 2007) have significantly contributed to our understanding of the influence of the upper echelon on strategy management processes. Although the individual influence of these top-tier practitioners is supported by some studies, the impact of other organizational units and practitioners on the issues of strategizing and strategic management remains largely unexplained. More specifically, the roles and significance of strategy management units (SMUs) towards the various organizational outcomes require a rigorous examination. These units are primarily organized to manage an organization's strategy-related matters. It is therefore crucial to explain how SMUs affect the strategic management process and other organizational outcomes.

The current SMUs literature has several limitations, mainly related to conceptual foundations and the range of topics addressed by existing studies. The first gap in the literature is that many of the existing studies on SMUs lack a theoretical foundation to explain the relationship between different features of SMUs and other organizational outcomes. The presence of SMUs and related conceptual issues is not a totally new idea in the strategic management literature.

For instance, issues of organizing strategy work and the significance of SMU were pointed out by some of the early studies, such as Chandler, (1962); Chatman & O'Reilly, (2016) idea of separating strategic and operational activities (1962, p. 5), Mintzberg's planning schools briefly discussed the strategic planning departments' role (Mintzberg et al., 1998) and also recent studies focusing of the Chief Executive Officer (Breene et al., 2007). Regardless of their contribution, some of these studies were not based on theories to explain the influence of SMUs. A second gap here is that existing studies have failed to clearly elucidate the role and significance of the units.

Another major gap is the lack of clearly defined research topics and problem areas in the literature. The root cause of this gap is that SMU-related concepts and studies are not well developed, and some topics are neglected by scholars. It is also noted that previous SMU-related studies tend to be fragmented, primarily in terms of conceptual focus. For instance, some studies have focused on structural, environmental, and other macro-level issues such as the units' roles and organization (Whittington et al., 2017), whereas other studies focused on individuals within the units, such as the CSOs (Breene et al., 2007; Delmar, 2003). This has made it difficult to coin new concepts and impeded the growth of the research stream.

The main purposes of this review are to examine current studies, identify main thematic areas in SMUs studies, and suggest directions for future studies. The review has several contributions to the literature. One contribution is that it enabled us to identify the main thematic areas of SMUs studies and map possible research avenues for future studies. Another contribution is theories that could be used to explain factors that influence the structure, presence, and effectiveness of SMUs are identified. Here, we tried to show the significance of the Resource-Based view (RBV) (J. Barney, 1991) and the integrated SAP model (Jarzabkowski et al., 2016) in studying SMUs. In addition to existing theories, the review offers propositions that can be used as hypotheses in future studies. This review also has practical significance for managers and other practitioners as it outlines the possible ways that SMUs could be organized and how they influence strategizing and organizational outcomes.

#### Conceptual Framework and Main Questions of the Review

The term strategy management unit (SMU) refers to an organizational unit that is constituted to take responsibility for tasks related to the strategic management process. SMUs are one way of managing and organizing strategy work (Paroutis & Pettigrew, 2007), as their principal concerns are related to strategy work. They can be considered as one of the strategy-governing structures within organizations.

The framework of the review is based on the literature review approach suggested by Lim, Yap, & Makkar (2021), which is the ADO-TCM, short for Antecedents-Decisions-Outcome and Theories-Context-Methods. Using this integrated conceptual framework, it is possible to identify factors that influence SMUs' presence (Antecedents), the decision to have SMUs and roles in organizations (Decisions), and SMUs' influence (Outcomes), and by using theoretical, contextual, and methodological backgrounds in the studies under review.

The first thematic area that this review focuses on is the factors that affect SMUs' presence. Recently, the call for studies that examine the identity, roles, and influence of SMUs and other strategy professionals has increased

significantly (Burgelman et al., 2017; Kohtamäki et al., 2021; Mantere, 2008Vaara & Whittington, 2012). It is acknowledged that organizational outcomes are not a mere result of managers' practices; rather, they are the result of interaction between multiple practitioners, practices, and praxis (Jarzabkowski et al., 2016). SMUs and the professionals in units are of such practitioners about whom a lot is not explored yet. As a starting point, it is important to understand the environmental antecedents or factors that influence SMUs' presence. Accordingly, the following question is asked: Which organizational (internal) and external factors affect the presence of SMUs?

Results from previous studies show that dimensions of organizational structure, i.e., centralization, formalization, size, and forms of ownership (Hamann, 2017; Pertusa-Ortega et al., 2010), affected the presence of some organizational units. Studies also show that CEOs' attributes, such as tenure, are related to organizational change and risk-taking behaviors (Frag & Mallin, 2018), and attributes of TMTs (Marcel, 2009). The complexity of factors in the external environment, as well as environmental dynamism (variability), influences the nature of the strategic management process of firms (Duncan, 1972). It is thus relevant to examine how current SMU studies explain how such environmental factors influence the presence of SMUs. The second focus area of the review is on the roles and responsibilities of SMUs. The roles and significance of SMUs are characterized by perplexing findings. On the one hand, some studies show that SMUs' roles of economic analysis, forecasting, and planning, in general, have been declining as a result of changes in the environment (Mintzberg et al. 1998, p.66-68; Grant, 2003). On the other hand, studies suggested that the environmental changes have made CSOs a vital part of firms strategizing process by taking part in strategy formulation and business development activities (Delmar, 2003). It is also argued that CSOs are not only concerned with strategic planning but also take part in the entire strategic management process (Breene et al., 2007; Kachaner and Stewart, 2013). Thus, to examine these opposing findings in detail, we focus on answering the following question: What are the roles and responsibilities of SMUs?

Finally, the review focuses on the influence of SMUs on the strategy process, overall firm performance, and other organizational outcomes. Studies on other strategy practitioners, such as the CEO and the CMO, indicate the influence of practitioners in organizations. For instance, the effects of level of education and board experience of CEOs (Frag & Mallin, 2018), and the presence of a CMO (Nikolov et al., 2016) on organizational performance were addressed in previous studies. However, our knowledge of the overall influence of SMUs is very limited. Thus, to focus on these issues, we have outlined the following question: What are the influences of SMUs on the strategic management process and organizational performance?

Accordingly, a conceptual framework is proposed, as shown in Figure 1. The framework provides the basis for this study by clarifying the possible antecedents that influence SMUs and their effects on other organizational outcomes. The first element in the framework highlights the main issues concerning the units, including their presence and roles. Examining the issues that determine the presence of SMUs will enable us to understand the factors that necessitate the establishment or absence of SMUs. SMUs' presence could be potentially influenced by both internal and external factors. The framework also depicts the directed and possible mediated effect of SMUs.

In terms of theoretical explanation, the framework is mainly based on the integrated model of SAP and RBV to determine the causal link among the concepts included in

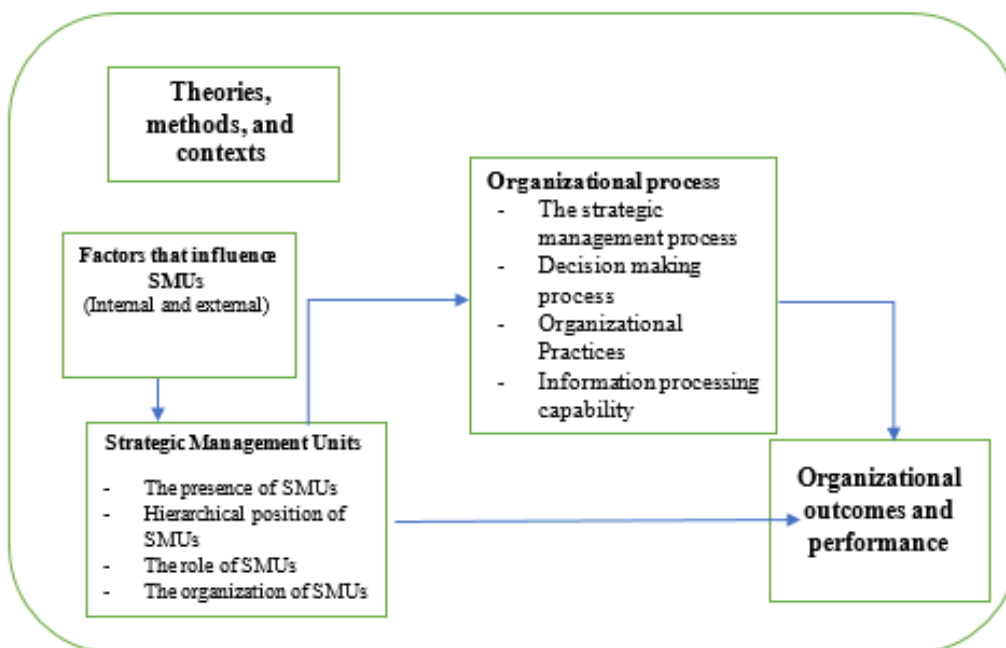


Figure 1. Framework for studying Strategy Management Units (SMUs)

the framework. The integrative model of SAP by Jarzabkowski, (2016), which states that even publicly known practices become a source of competitive advantage as a result of the unique attributes of practitioners. That is, by taking on the assumptions of the RBV (Barney, 1991), practitioners and practices could become rare, valuable, inimitable, and non-substitutable.

## Methods

The method employed in this review is an integrative literature review. An integrative literature review is a type of literature review that enables researchers to review of various works of literature in order to synthesize and elaborate links among different studies and concepts to generate new insight on a topic (Oermann & Knafli, 2021). The main advantage of an integrative review is that it enables researchers to identify concepts, propose possible explanations, and depict links among concepts without being tied to a specific topic or methodology (Cronin & George, 2023). According to Torraco, (2005), an integrated literature review can be used in two cases: first, when a topic has been studied well so that future direction can be identified, and second, when a topic is new. In contrast to systematic literature reviews, which are characterized by a focused search of the literature, an integrative review enables the review of research works from diverse sources so that a relatively new concept gets the opportunity to be viewed from multiple perspectives. In addition, as a framework of the review, the ADO-TCM (Antecedents-Decisions-outcome and Theories-Context-Methods) approach (Lim et al., 2021) is used to structure the concepts, results, and theories into different thematic areas.

### Data Collection Procedures

The overall methodology and the data collection procedures for this integrated literature review are based on the steps that are suggested by Torraco (2005; 2016). The first step is clarifying the need for an integrative review, which was done in previous sections.

Second, we proceed to identify the purposes and questions of the review. At the same time, we decided to organize the review by using a thematic structure (Torraco, 2016). That is, the review is organized by identifying topics and issues that represent similar or related thematic topics. The third step involves clarifying the method of selecting studies for the review. For this purpose, we focused on identifying databases, selecting the relevant studies, assessing the quality of the studies, and extracting and synthesizing data (Torraco, 2016). In this stage, we examined various research databases that provide research outputs in management and business fields. Finally, three databases were chosen for the literature review: Scopus, Web of Science, and Jstore. The main criterion for selecting these databases is that they contain relevant and insightful studies concerning SMUs.

Following this, the search for specific articles was conducted by using search strings. First, key terms were identified, including Chief Strategy Officer (CSO), Chief Planning Officer, Planning Department or Strategic Planning Department, Corporate Planning Department, Office of Strategy Management or Strategy Management Office, Strategy Team, Strategic Planners, Strategy Planning Professionals, and Strategy Planning Officers. This absence of key terms in articles was the first exclusion criterion based on the review protocol. The language in which an article is written was another exclusion criterion, i.e., only the English language. During the initial search for research articles in all databases, we found a large number of articles whose main topics, titles, and abstracts were irrelevant to the review. Once again, we used the key terms in titles and read abstracts of studies to check the quality of the articles and as a criterion for inclusion. That is, the major quality check criterion is the relevance of the studies to the review. By examining the abstracts and reading the articles in detail, the quality and the significance of the reviewed articles were confirmed. Another quality check is the methodological soundness of the article, that is, the extent to which the study utilized a methodological approach to clarify the concepts and issues surrounding SMUs.

After filtering the studies that were not related to this

review, an in-depth analysis of the studies from the three databases was conducted. The initial search based on titles of studies and key search terms resulted in 115 studies in the Scopus database. Of the articles we found in the Scopus database, only 12 of them have relevant content for this review. Similarly, we narrowed down the number of studies from the Web of Science to 3 and 5 studies from the Jstore database. After carefully examining databases and articles, we identified 20 articles as significant for the study.

After this, the review proceeds to examine what is known about the concepts and ends with clarifying areas that require further examination. Accordingly, the integrative review starts by identifying the concepts that are in line with the review. The review is a conceptual organization (Torraco, 2016), which is a structure of a review around a main concept.

## Result and Discussion

Based on the questions, the analysis and results of the *Table 1. Methodologies and Theories in current SMU studies*

review are presented as follows.

### Theoretical Foundations and Methodological Approaches Used to Study SMUs

In terms of using theories as the basis for studying SMUs, few studies utilized existing theories to explain the research problems. Among several theories, contingency theory was preferred by some studies to examine factors that affect SMUs and the units' influence on organizational outcomes (Grant, 2003; Menz & Barnbeck, 2017). [Table 1](#) summarizes the theories and methods in SMU studies.

The SAP perspective was also utilized in some studies to examine issues such as team-level practices (Paroutis & Pettigrew, 2007; Angwin et al, 2009), CSO, and other strategy professionals (Knight & Jarzabkowski, 2022).

In terms of methodological and research design approaches, the majority of the studies were case studies, including single case study designs (Wadström, 2022) and longitudinal, processual, and comparative case-based approaches (Paroutis & Pettigrew, 2007). It is noted that there is a need to explore quantitative approaches in SMU studies.

		References
<b>Methodologies and approaches used</b>	<b>Case studies variations;</b> Exploratory methodology/ A single case study design with interview and document analysis/An in-depth longitudinal case study/ Case studies / A review of different cases	<a href="#">Wadström, (2022); Paroutis &amp; Pettigrew, (2007)</a>
	<b>Non-reactive study</b> of firms based on data collected over five years.	<a href="#">Menz &amp; Scheef, (2014).</a>
	<b>Survey and in-depth interviews of CSOs;</b> Discourse analysis and interviews	<a href="#">Knight &amp; Jarzabkowski, (2022); Menz &amp; Barnbeck, (2017)</a>
<b>Theories used</b>	<b>Contingency theory</b>	<a href="#">Menz &amp; Scheef (2014); Whittington, et.al., (2017).</a>
	<b>Strategy as practice perspective on strategizing and strategy professionals</b>	<a href="#">Wadström, (2022); Knight &amp; Jarzabkowski, (2022);</a>

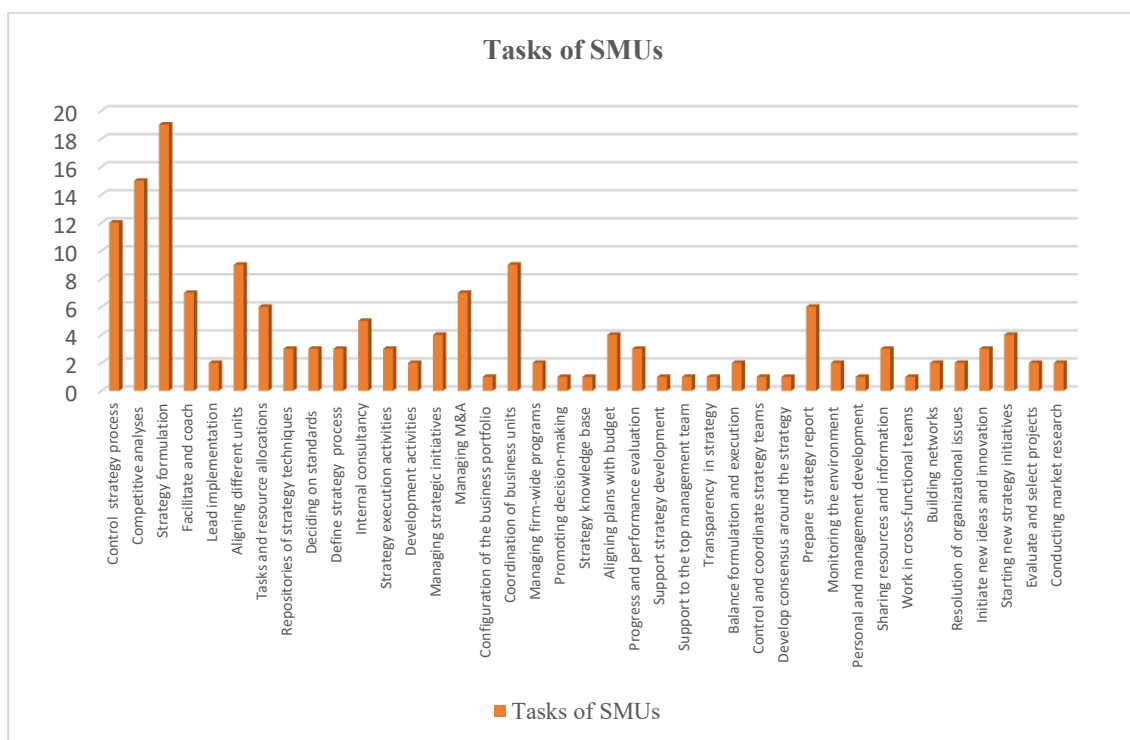


Figure 2. The Frequency of Tasks of SMUs in the Reviewed Articles

Table 2. Roles of Strategy Management Units

No.	Refined tasks and responsibilities of SMUs	Roles
1.	<ul style="list-style-type: none"> <li>- Controlling the strategy process and model</li> <li>- Define the strategy management process</li> <li>- Repositories of strategy techniques</li> <li>- Develop the strategy knowledge base</li> </ul>	<b>Overseeing the strategy process</b>
2.	<ul style="list-style-type: none"> <li>- Conducting various competitive and market analyses</li> <li>- Leading strategy formulation, developing and evaluating strategy alternatives, and communicating strategy</li> <li>- Deciding on the standards of strategy</li> </ul>	<b>Leading strategy formulation and development</b>
3.	<ul style="list-style-type: none"> <li>- Leading and monitoring implementation</li> <li>- Configuration of the business portfolio</li> <li>- Coordination of business units</li> <li>- Managing firm-wide programs during organizational changes</li> </ul>	<b>Strategy execution</b>
4.	<ul style="list-style-type: none"> <li>- Taking part in business and corporate development activities</li> <li>- Managing strategic initiatives</li> <li>- Managing mergers and acquisitions (M&amp;A), international expansions and alliances</li> </ul>	<b>Business development</b>
5.	<ul style="list-style-type: none"> <li>- Review progress against plan and performance evaluation</li> <li>- Support strategy development</li> <li>- Provide support to the top management team</li> <li>- Establishing transparency and accountability in strategy</li> <li>- Balance strategy formulation and execution</li> </ul>	<b>Strategy control</b>
6.	<ul style="list-style-type: none"> <li>- Aligning different units of an organization</li> <li>- Defining and negotiating tasks and assignments, resource allocations, and developing an action plan</li> </ul>	<b>Aligning and integrating the role</b>
7.	<ul style="list-style-type: none"> <li>- Facilitate, coach, and lead in strategic planning</li> <li>- Taking part in personal and management development</li> <li>- Sharing strategy-related resources and information</li> <li>- Work in cross-functional teams</li> <li>- Building networks and relationships across the firm</li> <li>- Supporting the resolution of organizational issues</li> </ul>	<b>Communication, coaching, and developmental roles</b>
8.	<ul style="list-style-type: none"> <li>- Providing internal consultancy, supporting executives in strategic proposals and communication, and providing assistance</li> <li>- Develop and initiate new ideas and innovations</li> </ul>	<b>Internal consulting and liaison roles</b>
9.	<ul style="list-style-type: none"> <li>- Starting new strategy initiatives/projects</li> <li>- Evaluate and select projects</li> <li>- Conduct market research and identify market segments</li> </ul>	<b>Initiating roles</b>

Another methodological limitation of existing studies is that most studies failed to include validity and reliability tests and results.

Mapping the Current Research Streams in SMU Studies

After a careful review and thorough analysis, three major central research thematic areas of SMUs studies are identified, with several sub-thematic areas under each central theme. Here, we map the research track and thematic areas by using the framework mentioned above, Antecedents-Decisions-Outcome and Theories-Context-Methods (ADO-TCM) approach (Lim et al., 2021). The first central thematic area concerns issues associated with the factors that influence SMUs the presence and organization of SMUs. These are the antecedents of the units. The second central thematic area is regarding the roles and responsibilities of SMUs. This thematic area is related to the “Decision” process of the units, which includes the decision processes and tasks that they perform. The third central thematic area is the influence of SMUs, which is related to the “Outcome” of the framework.

Factors Influencing the Presence and Organization of SMUs

The results of our review indicate that there exists a variation in organizing SMUs and that their presence varies from one organization to another. As a result, we identified the following research areas concerning the structure and

presence of SMUs.

Factors Influencing SMUs' Roles and Presence

The factors that influence the presence of SMUs are one of the least explored thematic areas in SMUs studies. Although these factors might vary to some extent across organizations, two sub-thematic areas are identified by categorizing them into organizational (internal) and environmental (external). The theoretical foundation of these thematic areas is mainly the contingency theory (Grant, 2003; Whittington et al., 2017) in order to describe how environmental factors influence the unit's roles and presence.

In the first sub-thematic area, several external (environmental) factors that influence SMUs' roles and presence were identified from extant studies. Results indicate that environmental turbulence (Whittington et al. 2017), price changes, increasing competition, and uncertainty in the external environment (Grant, 2003), rapid technological changes (Litschert, 1971), all resulted in changes in the job characteristics of strategy professionals, as well as diminishing the roles of SMUs.

Some studies also addressed internal (organizational) factors, such as the complexity of organizational structure and firms' engagement in innovative activities (Breene et al., 2007) were suggested as factors that would affect managers' decisions to have a CSO. Findings also show that the introduction of a management tool, the BSC, the inability

of line managers to handle strategic planning-related issues, and the lack of coordination among organizational units are some of the organizational factors that led firms to set up an SMU (Kaplan & Norton, 2005). Grant (2003) stated that reorganization, management styles, performance targets, and strategic focus were found to affect the roles and influence of SMUs. This indicates that restructuring decisions have impact on SMUs' role, and it might also be related to their presence. Besides factors influencing SMUs' presence in companies, Menz & Scheef (2014) took an interest in factors that affect CSOs' presence in the TMT and found that diversification, acquisition, alliance activity, and TMT role interdependence positively influenced CSOs' presence in TMTs.

In terms of "Contextual" factors (Lim, et al., 2021), SMUs are found in different types of organizations which vary in size, industry, and operation in several in different countries. SMUs are found in different types of firms such as food processing companies, healthcare, and medical equipment manufacturers, furniture manufacturers (Breene, et al., 2007), pharmaceuticals, chemical, and biological firms (Pink, 1988) steel processing (Friedrich & Van't Land, 1974), and capital equipment, aluminum, and oil manufacturers (Kudla, 1976). Interestingly, SMUs are commonly found in multinational and multi-business companies (Menz & Scheef, 2014; Paroutis & Pettigrew, 2007; Grant, 2003; Pink, 1988; Kudla, 1976; Friedrich & Van't Land, 1974). Despite these findings, there is a lack of clarity concerning the extent to which organizational size and scale of operation are associated with the presence or absence of SMUs.

A major gap identified in this thematic area is that the influence of the institutional environment is still under-researched. It is important to explore how SMUs could be affected by actors in the institutional environment, such as consultants, government agencies, and other regulatory bodies.

#### Organization of SMUs

The organization of the units is one of the research streams that is rarely examined in SMUs studies. In general, two main themes are identified in relation to the organization of SMUs are first, the titles of the units and their roles across firms, and second, the presence of sub-units within SMUs.

The research on SMUs organization is relatively at an early stage, which prompts clearly defining what the units do, their titles, the scope of their responsibility, and their similarities across organizations. So far, the effort to clarify the titles of SMUs and their implications is very limited.

In general, the titles of the units include terms such as "strategy", "management", "development", and "planning". These words indicate that the units are involved in tasks that are mainly strategic and long-term direction of firms. Titles such as Office of Strategy Management (OSM) (Kaplan & Norton, 2005), Strategy Teams (Bodily & Allen, 1999; Paroutis & Pettigrew, 2007), and Corporate Development and Strategy Function (CDSF) (Menz & Barnbeck, 2017) were used to refer to SMUs. Besides such titles, the units have also been referred to by the heads of the unit, like the CSO (Menz & Scheef, 2014; Breene et al, 2007) and Senior Strategy Directors (Angwin et al, 2009). According to Menz & Barnbeck (2017), the title of SMUs in the 1970s and 80s was mainly associated solely with planning, indicating the main role of the units was engaging in long-term planning. For example, corporate planning (Pink, 1988), planning groups (Litschert, 1971), and the Planning Department (Friedrich & van't Land, 1974; Murphy, 1984).

Besides, through time, it is possible to see that the scope of the unit has changed from merely a planning department to a more comprehensive title. In relation to the first theme, future studies could benefit from an exploratory approach to discover the types of SMUs and also examine the similarities and differences among the units across firms and industries.

The second thematic area concerning SMUs organization is the internal structure of the units, i.e., the sub-units in SMUs. Although such sub-units are not clearly explored in recent studies, some studies indicate that SMUs, especially at the corporate level, have several sub-units. Pink (1988) found that three sub-units in the corporate planning department, namely, the planning group (office), the economics and external studies group (economic analysis), and the information technology (IT) managing group. In addition, Litschert (1971) found that in some industries, SMUs were managed under the engineering department and had up to four sub-units. In brief, there is a gap in explicating the implications of SMUs' internal structure and sub-units on organizational outcomes.

#### Hierarchical Position of SMUs

The hierarchical position of SMUs is another sub-thematic area that awaits further investigation. In spite of the paucity of studies, there seems to be a similarity in when it comes to the positioning of SMUs on the organizational chart. In general, the review indicates that SMUs were found both at the corporate and business unit levels, and at the business unit levels.

The main topics in this thematic area were the units' hierarchical position and its implications on the degree of power the units have, and their influence on the strategizing process and on other organizational units. In the study by Wadström (2022), SMUs at the business unit level directly report to the business director, and SMUs at the corporate level report to the CFO without any direct link with business unit-level SMUs. Other studies also show that in some organizations, SMUs operate at a level between the top and middle management (Paroutis & Pettigrew, 2007) and the first or line manager level (Delmar, 2003; Bodily and Allen, 1999). In addition, the studies by Angwin, Paroutis, & Mitson (2009) and Kaplan & Norton (2005) indicated four possible positions of SMUs. First, strategy directors that directly report to the Chief Executive Officer (CEO), second, they can be found under other larger units and report both to the functional head and the CEO, third, under a sub-unit of a larger organizational unit (division), and finally, strategy directors could be assigned as a CEO's personal advisors. Menz & Scheef (2014) indicated that CSOs could be found in the TMTs. Regarding the titles of SMUs at different levels, the corporate-level SMUs (CSMUs) were referred to as corporate (center) strategy teams (Wadström, 2022), corporate center strategy teams (Paroutis & Pettigrew, 2007), and corporate planning departments (Whittington et al., 2017; Pink, 1988; Kudla, 1976). Business unit SMUs (BSMUs) are often referred to as business development managers (Wadström, 2022) and business unit strategy teams (Paroutis & Pettigrew, 2007).

In this thematic area, the main gap is that previous studies have overlooked how the positions of SMUs affect the unit's performance, organizational decisions, hierarchical position of SMUs, and their implication on organizational-level outcomes. Future studies could focus on these gaps in order to explicate the implications of the difference in SMUs hierarchical position.

#### Professional Backgrounds of Strategy Professionals in SMUs

The sub-thematic area concerning professionals in SMUs has its roots mostly in Strategy as Practice (SAP)

studies. The term professionals here includes the CSO and the strategy professional in SMUs. The focus of this sub-thematic area includes topics such as the identity of and qualifications of professionals, their power dynamics, and their roles in the strategizing process.

The results from previous studies regarding the professionals in SMUs are somewhat scattered in terms of conceptual focus and fall short of providing an in-depth explanation. The skills and professional backgrounds of professionals in SMUs were found to vary across firms and within firms at the corporate and business unit levels. The study by [Wadström \(2022\)](#) shows that strategy professionals at the business unit level have long years of experience, starting from 20 years and above, with strong firm-specific knowledge. Likewise, [Breene et al. \(2007\)](#) indicated that CSOs have, on average, 8 years of experience before they assumed the CSO position, and some have up to 38 years of experience. Contrary to this, the strategy professionals at the corporate level have technical experience in areas like finance, information technology, manufacturing, etc., with limited knowledge about the firm's specific issues ([Breene et al., 2007](#)). Similarly, we identified CSOs who were formerly CEOs, presidents, vice presidents, and heads of divisions ([Breene et al., 2007](#)) and consultants ([Paroutis & Pettigrew, 2007](#)) with experience in different industries. In some cases, strategy professionals at the corporate level were professional economists and had backgrounds in finance and IT ([Grant, 2003](#)). These results indicate that a lot needs to be done to clarify the kind of professional, technical, and academic proficiencies that CSOs and other strategy professionals need to enhance strategizing activities.

Another sub-thematic area is the causes of variation of CSOs and strategy professionals' qualifications, and the power of strategy professionals. Concerning this issue, [Breene et al. \(2007\)](#) stated that there is no specific professional background that is attributed to CSOs, indicating the diverse backgrounds of CSOs. However, previous studies failed to address the causes of variation in expertise and the level of influence of strategy professionals. Besides, issues from behavioral strategy, such as hubris and personality that influence the strategizing, are overlooked topics.

#### The Roles and Responsibilities of SMUs

The second central thematic area of SMUs' studies concerns the roles and responsibilities of SMUs. So far, the main focus of this thematic area is on the types of tasks that SMUs perform in their respective organization. Generally, SMUs primarily participate in tasks related to the strategic management process. However, the units' roles extend to include business development, communication, and liaison roles. The primary examination of the roles of SMUs identified 9 main roles, each encompassing several different types of tasks. [Figure 2](#) shows the frequencies of these tasks that we have identified from the literature. The roles and the tasks that are performed by the units are summarized in [Table 2](#).

Although it is possible to identify the roles of SMUs, some areas require further investigation. The first sub-thematic area is how variation in SMUs' roles across firms is related to competitive advantage and overall firm performance. Another sub-thematic area includes contexts and other antecedents that affect role variation and the structure of the unit.

#### The Influence of SMUs

The third central thematic area of SMUs studies is regarding the influence of SMUs on strategizing and

performance.

#### *Strategy Management Units and the Strategic Management Process and Organizational Performance*

Concerning this sub-thematic area, most studies focus on the influence of SMUs on the strategic management process and organizational performance. There are some contradictions concerning the influence and the degree to which SMUs are involved in strategy formulation processes ([Kaplan and Norton, 2005](#); [Paroutis & Pettigrew, 2007](#)). Some studies show that professionals in strategy management units positively influence the strategic management process ([Menz & Scheef, 2014](#)).

Besides, these SMUs were found to improve the strategy process and the participation of strategists from different areas of an organization ([Paroutis & Pettigrew, 2007](#)), shaping the techniques, content, and methods of strategic planning and enhancing organizational communication ([Grant, 2003](#)). On the other hand, there are studies that show the declining and passive roles of strategy professionals and the limited influence of CSOs ([Grant, 2003](#); [Whittington et al., 2017](#); [Knight & Jarzabkowski, 2022](#)). These studies indicated that environmental and organizational factors have led SMUs to have very limited significance in organizations.

SMUs influence on performance varies in the extant literature. [Kaplan & Norton \(2005\)](#) indicated that firms that instituted what they call the office of strategy management benefited from sustained performance gains. However, this is not always the case, as [Menz & Scheef \(2014\)](#) found that the presence of CSOs in firms' TMT does not have any significant effect on performance. Future research is expected to clarify these opposing findings regarding the influence of SMUs on performance. Here, based on the structural contingency theory (SCT), the performance influence of SMUs might not be limited only to the direct effect. It has been suggested that the coordinating role of SMUs could enable them to influence task performance, psychosocial issues, and the firm's ability to adapt to new conditions ([Paroutis & Pettigrew, 2007](#)). In general, as one form of organizational resource, there are no concrete studies explaining whether SMUs have a positive or negative effect on organizational performance. [Menz & Scheef \(2014\)](#) stated that CSOs enhance the decision-making process of the TMT by providing information, and at the same time, they do not have any tangible performance impact.

Overall, the analyses and results indicate that more research is required concerning antecedents, decision processes, and the outcome and influences of the SMUs. In addition, future studies are expected to contribute to the literature by including theoretical explanations, contextual factors, and rigorous research methodology.

#### Theoretical Foundations for Future SMU Studies

In order to provide better theoretical foundations for SMU-related studies, it is suggested to utilize existing theories in accordance with the thematic areas identified. Our analysis shows that previous studies only used contingency theory and the SAP perspective in SMU studies. One issue that can be studied by using other theories is SMUs' influence on strategy processes and performance. As one form of resource, the Resource-Based View (RBV) can be used to expound how the roles and expertise of SMUs affect the strategy process and overall performance. That is, to understand how the roles of SMUs and analytical expertise influence the capability to successfully utilize resources ([Barney & Hesterly, 2015](#)).

In addition, future studies could employ the behavioral theory of the firm or behavioral strategy and the transaction

cost theory as the basis while studying SMUs. In the behavioral theory of the firm, it is stated that firms are composed of “conflicting groups” that pursue different goals that require coordination (Barca, 2017). Another sub-thematic area that relates to behavioral strategy studies cognitive and social-psychological issues (Powell & Angwin, 2012; Powell et al., 2011). It is also suggested that scholars need to examine strategic decision-making processes, administrative procedures, and the interaction of organizational units (Barca, 2017; 215). As behavioral strategy draws on multiple perspectives, the problem of coordinating and cooperating among different sub-units could be examined with the Transaction Cost Theory (TCT) (Williamson, 1981), which proposes the importance of coordinating different units of an organization. That is, as the role of SMUs influences coordination of organizational sub-units, and organizational outcomes could be taken as a sub-track of research in the behavioral strategy research stream.

#### Environmental Factors and SMU Presence

Internal and external factors have the potential to influence the presence of SMUs. Among these factors, environmental turbulence, fierce competition, technological change, and dynamism (Breene et al, 2007) were found to have both positive and negative effects on the presence as well as the roles of SMUs. Nonetheless, the mechanisms and the contexts in which such environmental factors affect the units are topics that need more detailed examination.

According to structural contingency theory (SCT), the effectiveness and performance of an organization or a unit depend on the fit with environmental factors (Pennings, 1987). One interesting assumption of SCT (Pinnell, 1986) is that for units to ensure their existence, they must carry out the decisions of the top management and adapt to environmental changes. Accordingly, by using SCT, future SMU studies could address issues like the influence of factors such as management style, strategy choice, structure, size, and other organizational characteristics, which could provide insightful results in the area. Based on the structural contingency theory, the following proposition is forwarded;

Proposition 1: The presence of SMUs is contingent on a firm's internal and external environmental factors

#### SMUs' roles and organizational outcomes

The findings concerning SMUs' roles contribute a lot to the integrated SAP model (Jarzabkowski et al., 2016) by revealing that practitioners are not the same across firms. According to the integrated SAP model (Jarzabkowski et al., 2016), these variations of tasks and practices of SMUs in turn have implications on performance, and the units could also contribute to an open strategy (Hautz et al., 2017). Future studies are encouraged to examine how these variations influence the strategic management process, practices, and firm performance.

Drawing on the behavioral strategy and TCT, one significance of SMUs' roles is enhancing the capability of a firm to deal with uncertainty and unforeseen changes. In times of change and uncertainty, Williamson, (1979, 1991) and Ghoshal & Moran, (1996) suggested the need for a purposeful “adaptation” which they also referred to as “coordination” and “cooperation”. This coordination and cooperation are intended to create “internal mechanisms” that enable organizational adaptation. In the face of uncertainty and change, the roles of SMUs in strategic planning, monitoring, development, and controlling enable firms to critically examine their environment and take necessary adaptive measures. Based on these findings,

we have developed the following propositions.

Proposition 2: The presence of an SMU increases the effectiveness of a firm's strategic management processes (planning, implementation, and control).

Proposition 3: The presence of SMUs enhances the coordination and cooperation of organizational sub-units.

Proposition 4: The presence of SMUs increases the information processing capacity and dynamic capabilities of firms.

Another application of TCT is how multinational firms coordinate their efforts and manage the costs of information. The study of Japanese firms in their quest to be wholly-owned or joint-venture by Hennart, (1991) shows that multinational companies (MNCs) consider the transaction costs when operating overseas. This suggest that the units are helpful for firms to adapt to a new business environment.

Furthermore, the identification of SMUs' roles could contribute to the further examination of the units' influence. Although the results show a clear list of tasks and corresponding roles, the analysis shows that not all of the studies suggested the theoretical implications of the identified tasks. Moreover, future studies could also use this list in this study to develop a measurement scale of the scope of SMUs' roles.

The results suggest that SMUs, as one of the functional units, have boundaries of their roles and responsibilities that are not strictly defined. To overcome this problem, we suggest applying a system approach to studying SMUs. That is, by considering SMUs as part of a larger system, SMUs' functions, their interaction with other systems and functions, and the necessity of sub-systems could be properly explained.

#### Organization, Roles, and Practices of SMUs

Despite having different titles and structures, the units have some commonalities in the tasks they perform. The presence of multiple titles of the SMUs somewhat indicates variation in the roles of SMUs, the structure of the units, and the backgrounds of the strategy professionals. Besides, it was possible to understand that SMUs are found at the corporate and business unit levels (Wadström, 2022; Paroutis & Pettigrew, 2007). Future studies need to examine the causes and implications of such variations in the organization of SMUs.

Furthermore, little is known about the professional experience, skill sets, and academic qualifications required of CSOs as well as strategy professionals. It is, therefore, important to explore the hierarchical positions, their professional background, and the cognitive issues associated with CSOs and strategy professionals.

#### SMUs, Resources, Competitive Advantage, Organizational Processes, and Performance

There are some studies showing SMUs influencing the strategic management process (Menz & Scheef, 2014; Paroutis & Pettigrew, 2007). Opposite to this, there are studies showing the declining influence of SMUs and their struggle to maintain their position in organizations (Grant, 2003; Whittington et al., 2017). These findings could be explained by the discourse analysis of Knight & Jarzabkowski (2022), which clearly stated the duality of CSOs' power, i.e., they are both powerful and powerless at the same time. Future studies could focus on the effects of unique attributes of CSOs and strategy professionals.

Proposition 5: SMUs' influence on strategic management processes, sub-unit coordination, and information processing capability translates into a positive impact on organizational performance.

The overall influence of SMUs on the strategic management process and performance can be explained by

utilizing the RBV and the integrative SAP model. By bringing these two theories and SMUs' it would be possible to provide the micro-foundational explanation for RBV and performance difference among firms.

## Conclusion

To conclude our review, we see that there are insightful research areas on SMUs that warrant researchers' attention. It is noted that the roles of SMUs in strategy formulation, their tasks, and practices have not been adequately examined in the strategic management literature. Enhancing the theoretical and practical significance of the units awaits researchers' engagement in related topics. Besides, the performance of such units is among the least explored topics. If this thematic area is examined sufficiently, it could provide critical insights for academics and managers. The influence of the upper echelon, the external environment, and the institutional environment on SMUs warrants

further research. Current studies on CSOs and strategy experts are limited in number and approach. Addressing these gaps in the literature requires input from both academicians and practitioners. Our contribution in this review includes, but is not limited to, conceptual frameworks, classification of SMUs' roles and responsibilities, potential research topics, and propositions to be tested. Aspiring researchers could greatly benefit from these contributions, as the review is comprehensive and integrated. Thus, future studies in these areas will be significant for both theoretical developments and the improvement of strategic management practices.

## Author contributions

The selection of review articles, data collection from the articles, analysis, and manuscript preparation were done by the first author. Both authors participated and commented on the different versions of the manuscript. All authors read and approved the final manuscript.

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