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**Daniel Roberto Pinto
Mandel Gandrita**

**RETHINKING THE STRATEGIC PLANNING
PARADIGM: A DYNAMIC CAPABILITY
PERSPECTIVE**

Tese, para cumprimento dos requisitos necessários à obtenção do grau de Doutor em Gestão realizada sob a orientação científica do Professor Auxiliar com Agregação David Pascoal Rosado da Universidade Europeia.

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Acknowledgments

I would like to express my deepest gratitude to my beloved wife Ana Gandrita for her unwavering support and strength throughout this incredible journey of mine, which has brought me immense joy as I delved into the topic of strategic planning. As we mark the completion of our research in the present year, we also celebrate the news of a new addition to our family - our precious little daughter, Maria Beatriz Mandel Gandrita.

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Keywords

Strategic planning; Bibliometric analysis; PRISMA method; SPSS, Sustainability; Artificial intelligence.

Abstract

The success of any company requires stakeholders to be aware of the constant intricacies in their environment and to respond effectively to the challenges, increasing their performance in the process. This can be achieved by being prepared for changes in the organization and by having a strategic plan that sets out goals and objectives to help the company to be more competitive and successful. However, there is a need to determine where strategic planning stands, if the pitfalls remain the same, and what areas need to be reconsidered to increase effectiveness. Our study aims to identify (1) what needs to be rethought in strategic planning and (2) what areas can be introduced or recaptured for this method to be more effective. The research starts with a literature review, followed by three qualitative and three quantitative studies (SPSS e JASP software) that will aid us throughout this investigation. By analyzing 40 interviewees (qualitative) and 915 respondents (quantitative) we could develop six studies, helping us to answer our central question and confirm some of the findings. These methods will contribute to our framework analysis of organizational perceptions, challenges, practices, and areas related to planning. This study has important theoretical and practical implications for strategic planning, management effectiveness, and employee dynamics. First, the perceptions on each management level and how they interact with strategic planning. Second, themes like sustainability, technology, and leadership can be perceived as support to organizations and contributing to decision-making.

Palavras-Chave

Planeamento estratégico; Análise bibliométrica; PRISMA; SPSS, Sustentabilidade; Inteligência artificial.

Resumo

O sucesso de qualquer empresa exige que os seus gestores estejam conscientes das constantes complexidades do seu ambiente e que consigam responder de forma eficaz aos desafios apresentados, aumentando a sua performance durante todo o processo. Esta dinâmica pode ser adquirida estando preparado para as constantes mudanças na organização tendo um plano estratégico que estabeleça metas e objetivos, ajudando a empresa a ser mais competitiva e bem-sucedida. Contudo, existe necessidade de determinar onde se encontra o planeamento estratégico, se as suas lacunas permanecem as mesmas e que áreas necessitam de ser reconsideradas para o aumento da eficácia. Nesse sentido, este estudo visa identificar (1) o que necessita ser repensado no planeamento estratégico e (2) quais áreas podem ser introduzidas ou recapturadas para que esse método seja mais eficaz. A investigação inicia com uma revisão da literatura, seguida de três estudos qualitativos e três estudos quantitativos (SPSS e JASP software) que nos ajudarão ao longo desta investigação. Ao entrevistar 40 pessoas com inquéritos distribuídos a 915 indivíduos desenvolvemos seis estudos que permitiram responder à nossa questão central e confirmar alguns dos nossos resultados. A utilização destes métodos contribuirá para a literatura, perceção organizacional, desafios, práticas e novas informações que possam enriquecer o planeamento. Este estudo apresenta implicações teóricas e praticas para o planeamento estratégico, gestão eficiente e a dinâmica dos colaboradores. Em primeiro lugar, a perceção sobre cada nível de gestão e a interação com o planeamento estratégico. Em segundo lugar, temas como sustentabilidade, tecnologia e liderança podem ser vistos como suporte para as organizações contribuindo para a tomada de decisão.

Keywords

Strategic planning; Bibliometric analysis; PRISMA method; Management; Strategy

Introduction

Without a doubt, H. Igor Ansoff occupied first place in the citation index in the field of strategy and strategic planning during the 1960s and 1970s. It was only in 1980, with Michael Porter, that he overtook and considered the best organizational method. This prominent influence was also linked to the worldwide success of Ansoff's book called "*Corporate Strategy*" (Martinet, 2010) which changed the way organizations were viewed.

As advocated by Pearce et al. (1987) planning is a process of determining the mission, strategies, policies, and major objectives that govern the allocation and acquisition of resources to achieve organizational aims. In that sense, it becomes essential that the approach to strategic planning incorporates an external analysis to identify the threats and opportunities, as well as an internal assessment of the organizational strengths and weaknesses (Glaister, 1999).

Considering these declarations, Dyson (2005) and Broome (2017), defined strategic planning as a set of processes that can be undertaken to develop objectives and goals over a three-to-five-year period. Additionally, SP aligns resources, energy, and activities towards a common goal in a thoughtful, disciplined, and systematic process of exploring and understanding emerging trends and desired futures (Weston, 2022).

Grant (2003) suggests that planning is one of the methods that synergically shape the future through a more systematic, rational, and logical approach, helping organizations achieve better performance and higher levels of competitiveness (Ejigu, 2023). On the other hand, Walter (2024) thinks that strategic planning aims to determine optimal capacity levels facilitating the organizational requirements.

Although the definitions did not change very much over the years, we could notice to a certain point strategic planning lost its traction (the late 90s) and was relegated to the background due to the numerous pitfalls attached to it. Most of the academics moved to other subjects related to strategic management and the organizations recognized other methods to operate daily.

However, those who continue to focus on planning (Netland, 2016; Silva, 2017; Gallo, 2019, Khanin, 2020; Sales, 2021; Gandrita, 2023) try to understand it and apply it effectively to other

subjects, especially to digitalization (Carnevale & Hatak, 2020; Carroll & Conboy, 2020; Fletcher & Griffiths, 2020; Venkatesh, 2020), sustainability (Pohl, 2022; Gandrita, 2023), and technological areas (Pianese, 2016).

For our research to be within the scope of dynamic capabilities and help to improve strategic planning fitting nowadays, our analysis needs to be conducted continuously to influence operational capabilities, performance, and the overall dynamic within the company. With that in mind, Ojha (2020) first asserts that planning alone may not be sufficient or satisfactory unless there is a thorough review of capabilities and infrastructure to support dynamic planning. Furthermore, it is important to address knowledge gaps in organizations that rely on routines to dynamically engage in the strategic planning process (Ojha, 2020).

Considering the adversities and continuous restructuring that is needed in strategic planning, in this research, we examine how strategic planning can be rethought and what areas need to be introduced or emphasized to increase organizational effectiveness. Throughout history, strategic planning has been neglected by several members of the organization and, to some extent, is absent from most theoretical frameworks. In light of this, we have decided to investigate this systematic method that directly or indirectly contributes to the structure of many organizations. Considering this, the following central question was established: How can the strategic planning process be improved to increase effectiveness?

To answer this research question, we developed six studies with the following structure. In our first research, we start with a literature review examining the past and present pitfalls of strategic planning and its importance in Society 5.0 while exploring dynamic capabilities theory.

A bibliometric analysis was conducted through several indexed papers showing the most relevant authors and research, and the importance of planning through citations/journals. Our findings show the relevance of strategic planning in Society 5.0, (2) the appliance of dynamic capabilities creating a defensive business model, (3) the two essential dimensions that can impact most strategic planning, and (4) the new pitfalls in today's context.

The second study explores top management limitations that hinder strategic planning and what is required to adapt the processes for different hierarchical levels. This research used a qualitative design, collecting information through interviews with $n=26$ top management individuals. Also, a bibliometric analysis using Web of Science (WoS) and B-On articles helped us gather relevant information on the topic. The study focuses on strategic planning and leaders,

top management commitment, processes for improved efficiency, and the relationship between top management and remaining levels of management.

Our findings highlight employee's efforts in top management response, the impacts of positive relations, the integration of different perspectives to enhance strategic planning, and the organizational outcomes across hierarchical levels.

In the third study, data were collected from $n=40$ respondents using a qualitative approach. A bibliometric analysis was employed to understand each step of the theoretical framework. Given the challenges faced by managers during COVID-19, organizations had to restructure their operations. This study aims to understand what top management can do to build bridges with the remaining hierarchy levels and propose solutions to increase effectiveness, enhance leadership, and maintain competitiveness.

The focus was to determine how leaders overcome remote work and team management challenges while navigating the pandemic context. The results show that remote leadership is crucial while moving forward to Society 5.0 as technology becomes present in our lives, the existence of three dimensions that need work while promoting work-life balance and developing the right soft skills to help teams.

After identifying how top management actions in different contexts and segments, the fourth study analyzes the relationship between environmental responsibility and workforce retention, and the role of environmental responsibility in strategic planning. A questionnaire was applied to $n=311$ participants, resulting in a quantitative method that allowed us to uncover how strategic planning can be adapted to address environmental issues.

A bibliometric analysis was added to enrich the study and gather valuable information. The findings of this study will provide insights into how social responsibility can improve employee retention and enhance organizational efficiency and effectiveness. The results address the value of implementing environmental guidelines in strategic planning, the contribution of top management and pro-environmental to apply it, and the encouragement to share knowledge and best practices.

The fifth study is considered an independent study that helps us verify if any of the previous conclusions are valid and what additional information can be retrieved. This paper examines how the relationship between management levels can disrupt planning in the context of resistance to

change, affecting retention and loyalty. We examine these questions through a mixed-method (qualitative and quantitative) setting.

Firstly, we used a qualitative method of interviewing $n=14$ top management executives to understand their perspectives. Secondly, we employed a quantitative method with $n=204$ middle and lower-management workers to cross-reference information and gather additional viewpoints.

This approach helps us to identify the patterns in their statements and confirm our conclusions. This paper contributes to the literature of the work pursued by exploring how social actors and different stakeholders can make a difference in participating in strategic planning and, how they can overcome, in counterpoint, the limitations of possibly not being able to participate in such strategic planning.

Lastly, to introduce a segment related to technology development and technological possibilities we developed a study entitled “AI integration and strategic planning: fostering inclusivity and strategic evolution in the workplace,” which incorporates technology and strategic planning while working on management relations and appealing to some extent to dynamic capabilities. It used a structural equation modeling approach in quantitative research, collecting answers from $n=360$ participants.

A bibliometric analysis was used to gather relevant information on research topics (AI and SP). Our findings reveal that AI is a tool for organizations to align their efforts and boost employee motivation. Employees who actively contribute and believe in this technology tend to embrace a culture of innovation more readily. Moreover, they become more resilient, playing a crucial role in supporting strategic planning efforts, providing benefits for navigating crises and uncovering sustainable strategies.

Through these studies, we were able to give an answer to our central question and create new avenues for research in strategic planning. Our research contributes in five significant ways: i) assesses the role of strategic planning in organizations questioning whether the time and investment lead to higher performance or foster a better understanding between several levels of management, ii) contributes to the theoretical framework on the topic (e.g. strategic planning, management, sustainability, and artificial intelligence), iii) emphasizing the role of strategic planning with other topics through a unique approach using software’s like SPSS, JASP, and MAXQDA vi) to offer a robust evaluation of models and hypothesis acquiring knowledge in the

process, and v) explore specific combinations and conditions leading to higher organizational performance and effectiveness.

Next, in the final section of this thesis, we present the conclusions and outline the factors that led to the answer to our central question. Additionally, we discuss the theoretical and practical implications of our findings.

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Anti- Plagiarism Commitment Statement

I, Daniel Roberto Pinto Mandel Gandrita, declare on my honor that the document titled **“Rethinking the Strategic Planning Paradigm: A Dynamic Capability Perspective”** corresponds to the result of the research developed by me, as a Ph.D. student in management at Universidade Europeia, and that it is an original work, where all contributions are correctly identified citations and their respective bibliographic references.

Furthermore, I declare that I am aware that the use of unidentified external elements constitutes a serious ethical, legal, moral, and disciplinary offense.

Lisbon, 14 of November of 2024

Daniel Roberto Pinto Mandel Gandrita

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Acronyms

AI – Artificial Intelligence

BA – Bibliometric Analysis

BLR – Binary Logistic Regression

CP – Competitive Advantage

CFA – Confirmatory Factor Analysis

CVA – Crosspoint Variable Analysis

CS – Collective Success

CF – Content Framework

DC – Dynamic Capabilities

DAS – Data Availability Statement

ES – Environmental Sustainability

ER – Environmental Responsibility

EFA – Exploratory Factor Analysis

FS – Fostering Growth

GN – Global Model

HRM – Human Resource Management

HS – Hybrid Synergy

ICS – Informed Consent Statement

JASP – Jeffreys’s Amazing Statistics Program

MAXQDA – Maximum Qualitative Data Analysis

MM – Middle Management

MR – Management Relations

MLR – Multiple Linear Regression

MS – Management Support

LM – Lower Management

LRP – Literature Review Process

OP – Organizational Performance

PRISMA – Preferred Reporting Items for Systematic Reviews and Meta-Analyses

RW – Remote – Work

SC – Sustainable Culture

SPSS – Statistical Package for Social Sciences

SM – Strategic Management

SP – Strategic Planning

SLR – Systematic Literature Review

SR – Sustainable Resilience

SI – Synergetic Innovation

SI – Strategic Innovation

SM – Strategic Motivation

TP – Top Management

TF – Theoretical Framework

TPI – Theoretical and Practical Implications

TMT – Top Management Teams

First chapter: Strategic Planning Pitfalls

Systematic Literature Review

Strategic Planning Pitfalls in Society 5.0: A Systematic Literature Review

Gandrita, D. M., & Rosado, D. P. (2022). Strategic Planning Pitfalls in Society 5.0: A Systematic Literature Review. *Mediterranean Journal of Social Sciences*, 13(5), 93.
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Associated question:

Which is the most meaningful pitfall that needs to be addressed in strategic planning?

Highlights:

- The renew of strategic planning;
- Addition of dynamic capabilities in planning;
- Pitfalls presented in society 5.0;
- Understand the implications of structuring planning.

Strategic Planning Pitfalls in Society 5.0: A Systematic Literature Review

Abstract

Although strategic planning relevance has its ups and downs, it has shown that it can always be a reference point to guide managers and management. This paper aims to clarify if the strategic planning pitfalls identified in the mid-90s still apply to today's reality. Also, to validate strategic planning's importance in society 5.0 while exploring its barriers from a dynamic capability's perspective. A bibliometric analysis focused on strategic planning pitfalls and the use of indexed journals/citations to validate the study relevance. To achieve this purpose, this study performs a systematic literature review and content analysis of 68 articles from 37 journals. The main results of strategic planning research revealed: (1) The relevance of strategic planning in society 5.0, (2) the appliance of dynamic capabilities creating a defensive business model, and (3) the two essential dimensions which can impact most strategic planning, and (4) the new pitfalls in today's context. Guided by dynamic capabilities theory, this paper seeks to promote insights related to the importance of strategic planning, adds value to the body of knowledge, and identifies contingency considerations that help explain the results on the relationship between strategic planning and the present context.

Keywords: Strategic planning; society 5.0; dynamic capabilities; strategic planning pitfalls; organizational planning.

Abbreviations

SLR, systematic literature review; SP, strategic planning; DC, dynamic capabilities; CP, competitive advantage; BA, bibliometric analysis.

1. Introduction

Strategic planning emerged on the corporate scene in the mid-1960s to which corporate leaders happily embrace as “*the one best way*” to implement and devise new strategies (Mintzberg, 1994: 107) to attain competitive advantage outperforming its competitors and affect its consumers positively (Helms, 1992).

The predominant idea was to establish targets, clear objectives, formal plans, and data analysis to enhance performance achieving organizational goals and use strategic planning to be more rigorous, explicit, systematic, and rational while applying scientific methods to organizational policy problems (Friedman, 1987). These thoughts were supported by authors like Drucker (1974), Steiner (1979), Ackoff (1981), and Dyson (1990) in their scientific discoveries claiming the continuous importance of strategic planning in the pursuit to a healthier internal and external organizational environment (Thomas, 1982).

This systematic planning mechanism was considered one of the main constructs in scientific discoveries. However, several well-published studies identified a set of fundamental pitfalls undermining the instrument reducing it to a fallacy (Mintzberg, 1994). This negative side of strategic planning points out the existence of hazards that could endanger the identity and culture of the organization (Godet, 2000) while damaging its formal planning or the value of planning.

In that sense, authors like Steiner (1980), Porter (1980), Mintzberg (1994), and Bonn (1996) reach a consensus throughout their studies that located some of the more significant pitfalls in strategic planning in the processes design, the involvement of human capital, and the lack of communication between top management and the remaining management levels.

In the following years, strategic planning has been out of flavor as a mainstream and dominant methodology (Carter, 1999), still the theme was subject of conversation throughout the times and recently discussed by managers or scholars such as Sax (2020), Panda (2021), Kaushik (2021), Al-Dhaafri (2021) as a method that can contribute to changing environment and interact with other development areas.

Leading to society 5.0, with a prominent focus on human beings at the center of innovation and technological modification for humanity benefit (Lima et al., 2020) strategic planning needs to be rethought and used in other areas of expertise.

The purpose of this research is twofold: first, shed some light on the importance of strategic planning in society 5.0 and validate what is the variable(s) more relevant in today’s context, and

second, understand the barriers that businesses face from a dynamic perspective. Considering the objective of this paper the following research question (RQ) was formulated: *Which is the most meaningful pitfalls that needs to be addressed in strategic planning?*

The literature review is presented to address the previous and recent state of strategic planning identifying the main pitfalls. As a result, this study pretends to show the trends in strategy, management, and several aspects related to strategic planning. The remaining steps of the paper are organized as follows: Section 3, the methodology which includes the bibliometric analysis, content analysis, and the development of the framework process. Additionally, it is presented the results of the of the bibliometric analysis and the papers portfolio.

Section 4 presents the propositions regarding strategic planning pitfalls, in Section 5, with the contribution of the previous analysis allow us to structure a pertinent discussion to the identified themes. Section 6 presents the implications. Finally, section 7 confers us the conclusions and limitations of the study.

2. Theoretical Framework

2.1. The State of Strategic Planning in the 90s

The concept of SP expressed the need for a framework to comprehensively understand the behavior of competitors and industry structure translating these into strategic operational recommendations (Porter, 1980). This strategic perspective becomes a response to the particular challenges inserted in business environments leading stakeholders within economic activities to reprise their long-term situation concerning relationships and products with suppliers and buyers (Betts, 1992).

Although SP is one of the least understood and the most talked-about activities in management practice, it does not have a predetermined formula or format that can ensure that a plan can be strategic (Sisson, 1992), which to some managers becomes confused because each organization adapts the process to its requirements. In that sense, to start the formal proceeding of SP, it is always necessary to ask “*What does the organization want to be in the long term*”, “*Where is it now*”, and “*What actions must it take to move from where it wants to be*” (Sisson, 1992: 42). Formal planning will aid in answering questions that the organization has in both unstable and stable environments (Ansoff, 1991).

However, Mintzberg (1994) draws attention to the inconsistencies the possibility of weak planning/performance and the findings relationship observed being the key rejection of formal planning as the “*one*” best way to plan (Brews, 1999). Throughout the following years, SP reached its decline and despite the efforts, it was exiled from its pedestal (Bonn, 1996). Several pitfalls (table 1) were identified making part of the vanquish of strategic planning changing the way organizations create their scenarios and work day-by-day (Godet, 2000).

Lloyd (1992) in his interview with Henry Mintzberg about the rise and fall of SP, stated that one of the problems rests on people being harassed many times to fulfill their tasks without enough time to step back. Mintzberg (1992) also calls attention to the fact that there are dysfunctions on planning itself regarding the lack of commitment from the organization, the ongoing obsession for gaining and maintaining control, the bias nature regarding how the organization is managed, and the fact that people devote to much effort to a process that doesn't produce the desired results.

Later, Mintzberg (1994) rethought SP pitfalls and added up the possibility that systems can do better or replace people, that there is an absence on how top management support for planning, and call attention to the climate in the organization not a propensity for planning. Following this reasoning, Steiner (1980), Porter (1980) draws attention to the fact that top management assumes that they can delegate the planning function to a planner, failure to consider all stakeholders' necessary involvement planning process. The lack of flexibility in processes, simplicity, looseness restraining creativity, and the fact that top management does not pass enough time planning discrediting the process among staff and managers.

To Hill (1996) the pitfalls are focused on the lack of education concerning the use of the essential analytical tools that SP suffers in the long-term the preparation from executives in conceiving the planning to reach their goals. However, Glaister (1999) mentioned that formal SP might be dysfunctional if introduce excess rigidity encouraging a lot of inflexibility and bureaucracy in response to the changing environment.

For last, Taylor's (1997) perspective demonstrates that although business plans are approved, teams don't “*own*” them consequently will never be used those same plans, considered the issue regarding the bureaucratic process a problematic approach because to managers it is an extension of business as usual, the discussions usually do not focus on plans but on strategic issues.

Table 1: The state of strategic planning in the 90s

Year	Author's Name	Pitfall
1992	Lloyd, B.	Urging people to fulfill their tasks.
1992	Mintzberg, H.	Organization's lack of commitment, obsession in maintaining control, and effort into processes that do not produce results.
1994	Mintzberg, H.	People can be replaced by systems, lack of support of top management, and the organization is not the propensity to planning.
1980	Steiner, G.	Top management can delegate functions, fail to assume the necessary involvement, lack flexibility, restrain creativity,
1994	Porter, M.	and the lack time dedicated to planning.
1996	Mintzberg, H., & Bonn, I.	
1996	Hill, S., & Chae, M.	The misuse of basic analytical tools and lack of conceiving planning to reach goals.
1997	Taylor, B.	Lack of planning evaluation too bureaucratic with complex approach, and strategy focusses on plans, not on a strategy.
1999	Glaister, K., & Falshaw, J.	Excess of rigidity, lack of flexibility, and excess bureaucracy.

Source: Own elaboration

2.2. Strategic Planning State of the art

The next stage in the evolution of civilization is centered in society 5.0, which underlines the idea of a rapid development of information technology allowing a human-centered society that balances economic advancement with the resolution of social problems by a system that integrates particularly physical space and cyberspace (Nagy, 2019). Although this vision uncovers policies and actions on society's level, such drive is founded and intrinsically dependent on organizations,

which are considered the most significant influence in institutions of modern society (Potocan, 2020).

Bearing the actual context in mind, researchers provided some additional arguments supporting SP and its evolution (table 2) throughout the times. According to Gallo (2019), this construct needs to be adapted to today's environment regarding the speed, structures, rapid decision making and nimble behaviors with one goal, in particular, to mitigate threats and seize opportunities. However, it becomes a fact that this environment can generate pitfalls, and those need to be recognized and solved so that organizations can move forward, with this into consideration the author points out the lack of relationship between financial and human resources and their effects on the use of SP tools (Ibidi, 2019).

Khanin (2020) states that if middle and top management have excessive information, there is an excellent chance that the capacity to focus on the organization can be limited. The author also talks about the undermining of human capital, the lack of relationship management has with their peers while influencing their participation in the strategy process, and the possibility that management can have biased decision making.

Scholars like Sales (2021) refer to variables like focus, integration, alignment review, and problem-solving as methods by Hoshikin Kanri and Kaizen-Kata as tools for SP. However, these prove to be unsuccessful as several factors condition the success, namely the management commitment and involvement to the organization, employee participation in the activities or decision making, the constant training to update competencies, education, and empowerment (Netland, 2016).

Although there is an ongoing debate about the role of leaders regarding SP, Posch (2020), in his findings, claims that the behavioral and cognitive tendencies for supporting learning and innovation are weak and that there is a possibility that SP would show its true face. During the definition of strategic objectives for the organization leaders, will lay out little consideration difficult to measure elements such as entering new technology fields and opening new markets, thereby preferring exploitation over exploration. Also, created the construction of a system of incentive and control to restrict innovation and employees' affecting negatively exploitation-exploration balance (Ibid, 2020). Silva (2020) contributes to the literature review with barriers regarding the bureaucracy, the change in resistance, profound disassociation between planning and management, and the inability to access data due to not being available to everybody.

Table 2: Strategic planning state of the art

Year	Author's Name	Pitfall
2016	Netland, T.	The management committee, employee participation, training update, acquisition of competencies, education, and empowerment.
2017	Silva, S. & Vieira, L.	Too much bureaucracy, resistance to change, inaccessible data, dissociation between planning, and management.
2019	Gallo, P. & Benkova, E.	Lack of relationship between finance and human resources and the effects in the use of strategic planning tools.
2020	Khanin, D. & Turel, O.	Inability to deal with information, undermining human capital, the relationship between top/middle management and the organization, and participation in the strategic process.
2020	Posch., A.	Little consideration to elements difficult to measure such as new markets and technology fields, restriction in innovation and employees.
2021	Sales, M. & Castro, R.	People can be replaced by systems, lack of support of top management, and the organization is not the propensity to planning.

Source: Own elaboration

3. Methodology

3.1. Research Method

To map the contributions and determine challenges and tendencies in the field of SP in the context of society 5.0, Table 3 presents the research structure.

Table 3: Research steps

Steps	Activities	Results
<p>Step 1: Problem Definition</p>	<p>(i) Gap identification (ii) Formulation of the research</p>	<p>Clarifying if the SP pitfalls identified in the mid-90s still apply to today's reality. Also, to validate SP's importance in society 5.0 while exploring its barriers from a dynamic capability's perspective.</p>
<p>Step 2: Systematic Literature Review</p>	<p>Prisma methodology (Fig. 5), according to the three main stages: (i) Identification: (a) Structuring the keyword from the thematic axes “<i>Dynamic capabilities</i>”, “<i>strategic planning</i>”, “<i>strategy</i>”, “<i>strategic planning pitfalls</i>”, “<i>organizational management</i>”; (b) definition of the research protocol (search for the keywords, definition of the databases, publication type publication years, document types, categories); (c) deletion of duplicated papers; (d) inclusion and exclusion papers; (ii) Screening: (a) Reading the title and abstract of papers to identify those that are not aligned with the purpose of the papers and should be excluded; (b) Read the full papers to exclude those that have in consideration the</p>	<p>Final portfolio: 68 papers. These explicit discuss the found challenges in the organizations, the pitfalls regarding SP and contributions related to the subject of study.</p>

	purpose of this research; (iii) Included: (a) Description of the final pull of papers.	
Step 3: Bibliometric Analysis	(i)Use the keywords to start the search, compiling/refinement of the database; (ii)Development of tables for descriptive analysis; (iii)Export the database to excel and a RIS file to VOSviewer; (iv) generate the VOSviewer network.	Characterization of the paper portfolio (evolution of publications, journals, and main authors). And network analysis (Co-occurrence, full counting and authors)
Step 3: Content Analysis	(i)Importation of portfolio articles to an excel considering the articles and the abstracts. (ii)Preliminary analysis of those related to the theme and with most frequent keywords and relevant information to the object of study. (iii)Organize the content to be used, (iv)Discuss within the researchers what papers to used.	Analysis of the 68 papers inside our portfolio and what areas SP can be linked.
Step 5: Construction of the Framework	(i)Selection of the results from previous steps, allowing the production of insights by the research team; (ii)Mapping the information regarding the study.	The unification of the results in a theoretical framework to identify SP pitfalls in today's context based on dynamic capabilities theory.

Source: Own elaboration

Our problem definition (Step 1) allowed us to shed some light the research question:

- RQ1: *Which are the most meaningful pitfalls that needs to be addressed in strategic planning?*

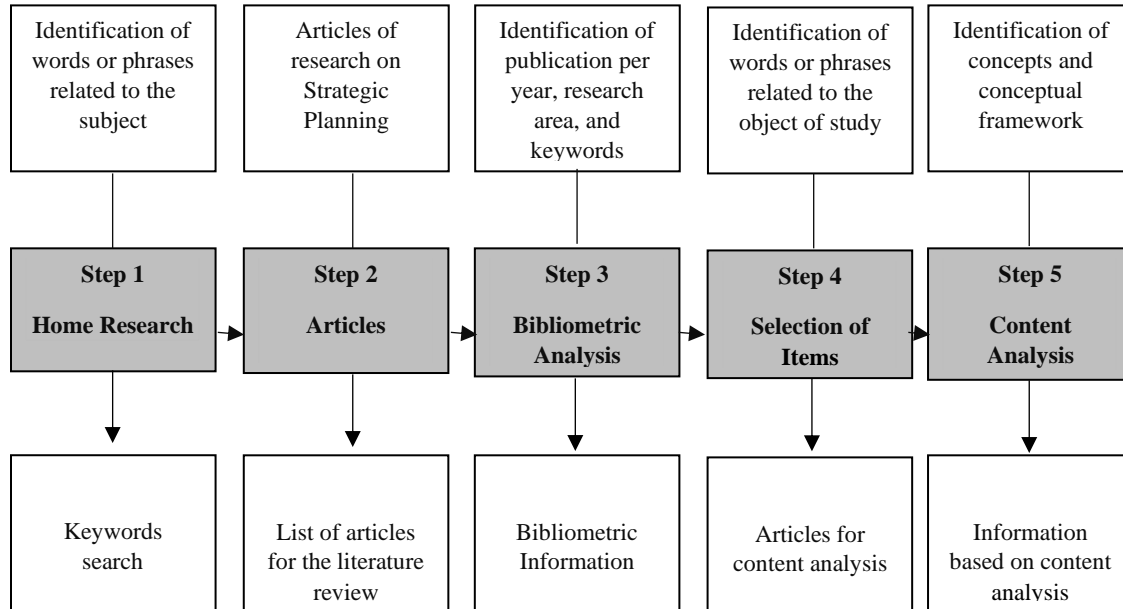
To carry our SLR we use PRISMA methodology (Page et al., 2021) in order to address the issues raised and identify relevant literature. The results analysis was based on two methods. First, the bibliometric analysis which enables a mapping of SP in the 90's and state of the art related on subject. Second the content analysis, allows the identification of the important topics on the subject, and the discussed challenges that need to be address in SP.

3.2. Systematic Literature Review

To understand the research trajectory about SP through time, we conducted a bibliometric study to enable a systematic review of the literature of international journals dating from 1980 to 2022. The bibliometric analysis requires quantitative statistical analysis and the publications to the corresponding citations. The primary purpose is to identify the items with the most significant impact in the study regarding keywords, citations, and journals with more significant effect.

The first stage of our research includes identifying the literature by searching significant scientific databases such as B-On, Emerald, Science Direct, Sage Journals, and Web of Science (WOS) focused on SP, society 5.0, DC, SP pitfalls, and organizational planning using social sciences as the research domain. Only peer-reviewed articles are considered the most relevant, credible and with the most impact than other sources (Mackenzi, 2005). Each of the articles was analyzed by the most relevant authors in the SP area removing those not linked to the topic or giving any perspective to the theme.

Table 4: Process of the systematic literature review



Source: Own elaboration

The keywords used have the purpose of deepening the study. The non-related articles were removed following this extensive search, not adding any relevant information to the subject of study. The words: *strategic planning*, *society 5.0*, *dynamic capabilities*, *SP pitfalls*, and *organizational planning* were added in the scientific platform WOS database providing a list of high-quality peer-review articles in the theoretical framework.

The use of the Boolean (table 5) indices helps to increase the search probability for relevant documents. The initial survey started by using relevant keywords in the query search preview, more specifically, the use of “strategic planning*” OR “strategic planning pitfalls*” AND “society 5.0, *” AND “dynamic capabilities*” AND “organizational planning”.

Table 5: Research Protocol

Search Term (Title, Abstract or Keywords).	“Dynamic capabilities” AND “Strategic planning” OR “Strategic planning pitfalls” AND “organizational planning” AND “society 5.0”.
Search Strategy	“AND”; “OR”
Database	B-On, Emerald, Science Direct, Sage Journals, and Web of Science (WOS)

Publication Type	Reviewed Papers and Research Papers
Language	English
Date	1980-2022
Publication Titles	68 results/37 Journals
Search Period	Not Specific

Source: Own elaboration

This search generated a collection of 50.537 results. By refining the search adding categories like Business and Management categories gave of 8.103 results. While searching for the publication years from 1990 to 2021, the sum found was 7.480 articles. The search was concentrated by document types by articles, giving 4.842 results. Filtered by publication titles (table 6) subscribe to the theoretical framework, it was determined 37 journals as the most relevant for this article.

Table 6: Journals and number of articles

Journal	No of articles
<i>Management science</i>	25
<i>Long range planning</i>	638
<i>Strategic management journal</i>	62
<i>Harvard business review</i>	52
<i>Management decision</i>	50
<i>California management review</i>	25
<i>Business horizons</i>	24
<i>Journal management studies</i>	23
<i>Journal of small business management</i>	21
<i>Business strategy and the environment</i>	20
<i>R D management</i>	17
<i>Sloan management review</i>	17
<i>Strategic management</i>	17

<i>Journal of business economics and management</i>	15
<i>Small business economics</i>	14
<i>Journal of Strategy and management</i>	13
<i>Business process management journal</i>	11
<i>European management journal</i>	10
<i>MIT Sloan management review</i>	10
<i>Strategy process</i>	1
<i>Academy of management journal</i>	9
<i>Journal of management</i>	9
<i>Journal of management organization</i>	9
<i>Asian pacific journal of management</i>	8
<i>British journal of management</i>	8
<i>International business review</i>	8
<i>Baltic journal of management</i>	5
<i>Polish journal of management studies</i>	6
<i>Journal of management development</i>	6
<i>International small business journal researching entrepreneurship</i>	6
<i>European management review</i>	6
<i>European journal of international management</i>	7
<i>Measuring business excellence</i>	8
<i>Journal of small business and enterprise development</i>	7
<i>Serbian journal of management</i>	8
<i>REGE – Revista de gestão</i>	7
<i>RBGN – Revista brasileira de gestão de negócios</i>	7
<hr/>	
37 Journals	1.195 results
<hr/>	

Source: Own elaboration

The outcome of refining by journals gives a total of 1.195 results. The research language for the articles was English which helped to narrow down the search.

Although refining gives a reduced number of articles (1.195 results), The screening stage was included to select the papers by reading the abstract and title (Silva, 2022) and verify the

subject of the paper is related to study. In this phase, we select those that discuss only SP and mention DC and society 5.0.

The subjects implied in the exclusion process are related to strategic thinking, performance, finances, environment, governance, supply chain, information systems, sustainability, scenario planning, marketing, and health. With the elimination of areas non-related to SP, it was possible to reach 68 articles, giving a solid base to work.

3.2.1. Inclusion Criteria

To conduct this study, reviewed journals were considered as a thrust source of knowledge, keeping out thesis, blogs, editorial notes, white papers, book chapters out from this study. To maintain the relevant publications and work related to this study (Rajput, 2021), included inclusion criteria corresponding SP and SP pitfalls.

3.2.2. Exclusion Criteria

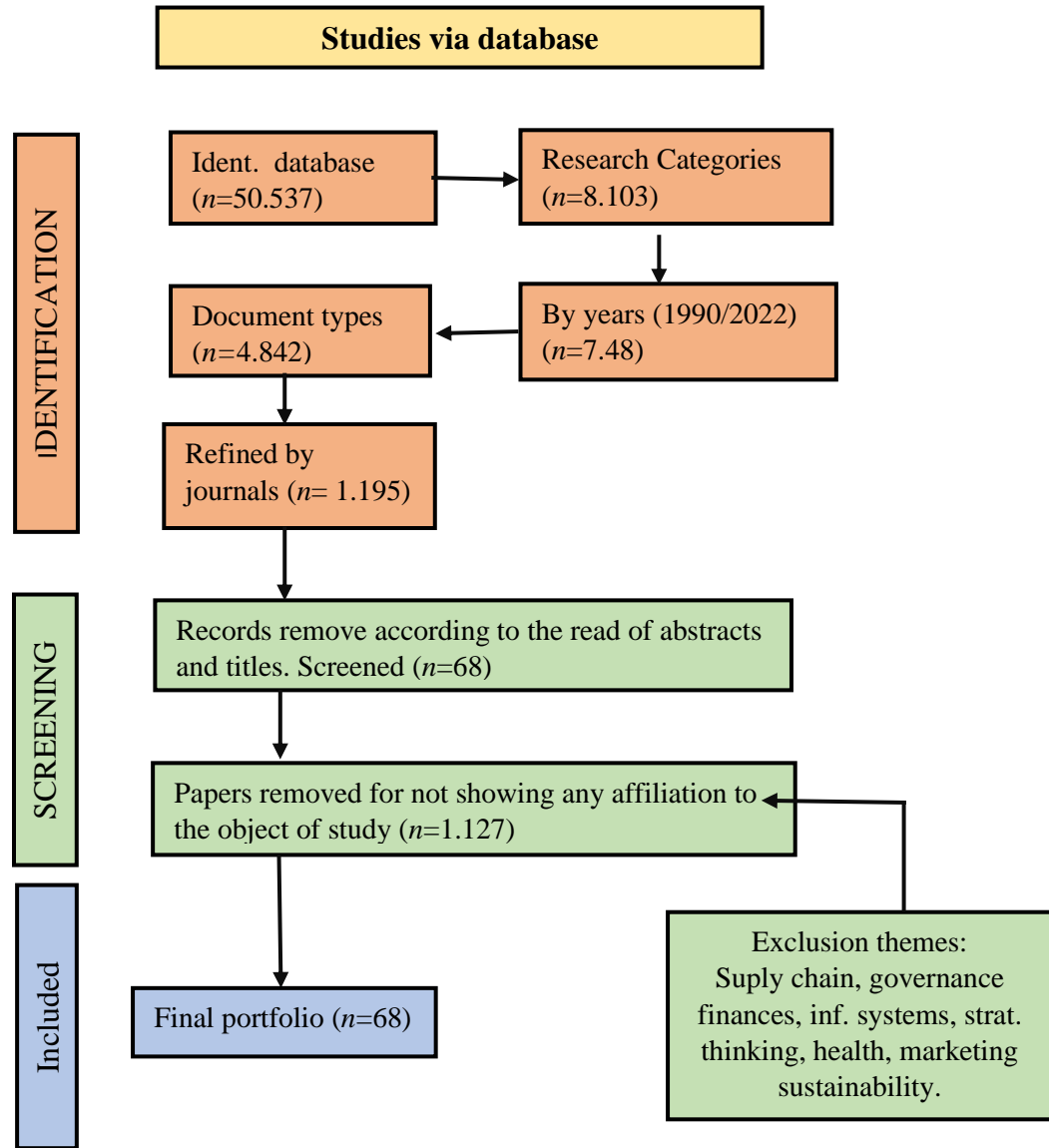
Research publications were collected according to inclusion criteria and unrelated publications to the study were ruled out for being beyond the work scope. The abstract, introduction, literature review, findings, and discussion were reviewed, and all of the articles that were not related to the subject of study were discarded (Anthony, 2016).

The rejected articles did not present pertinent applications or information on SP. Following the literature search formula, it was observed in Fig. 2 that the articles with SP inscription had grown significantly, although it has been related to other areas. Regarding the citations, those have also expanded year by year, reaching 1000 citations in 2016 and expanding gradually every year.

These figures represent the relevance on the subject of SP and SP barriers/pitfalls are conquering its space in social sciences again and can be explored and considered flexible to the existing subjects.

Note that snowball method was used in addition to the papers found, in Fig. 1 we illustrate the information files, presenting the quantitative data from the inclusion and exclusion files according to the steps of PRISMA methodology.

Figure 1: Studies via database



3.3. Characterization of the Articles Understudy

Fig. 2 shows the evolution of articles understudy from 1990 until 2021. This is an indicator that several authors considered the SP theme and can be combined with other research areas like education, pharmaceutical, performance, technology, and others. Since 1990s there has been a growth in publications reaching its peak in 2020, it can be attributed to the pandemic context to which organizations had to adapt, plan and review their purposes.

Figure 2: Characterization of the articles understudy

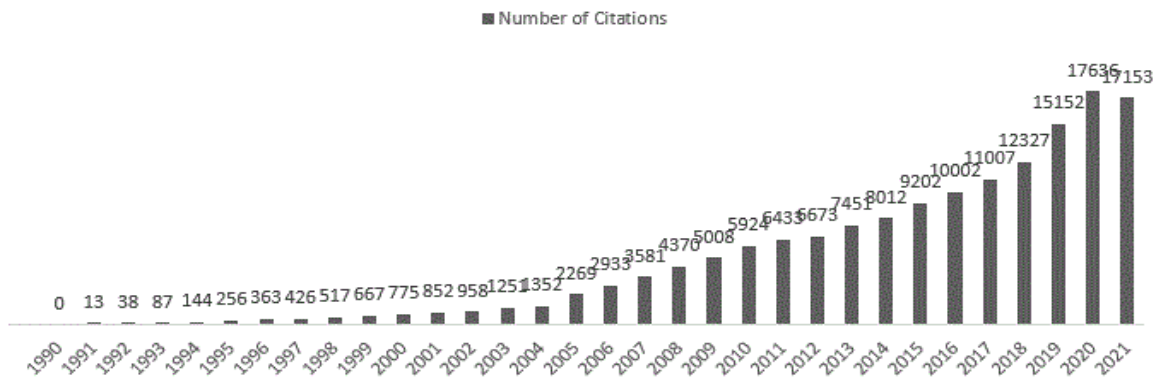


Source: Own elaboration

3.4. Characterization of Citations Understudy

Citations (Fig. 3) reach a higher value in 2020 of 17.636 citations. The graph shows the importance that SP regained in the literature, especially over the past few years. This also represents a continuous development of ideas from new and classic authors that can be incorporated in several articles expanding SP.

Figure 3: Characterization of the citations understudy



Source: Own elaboration

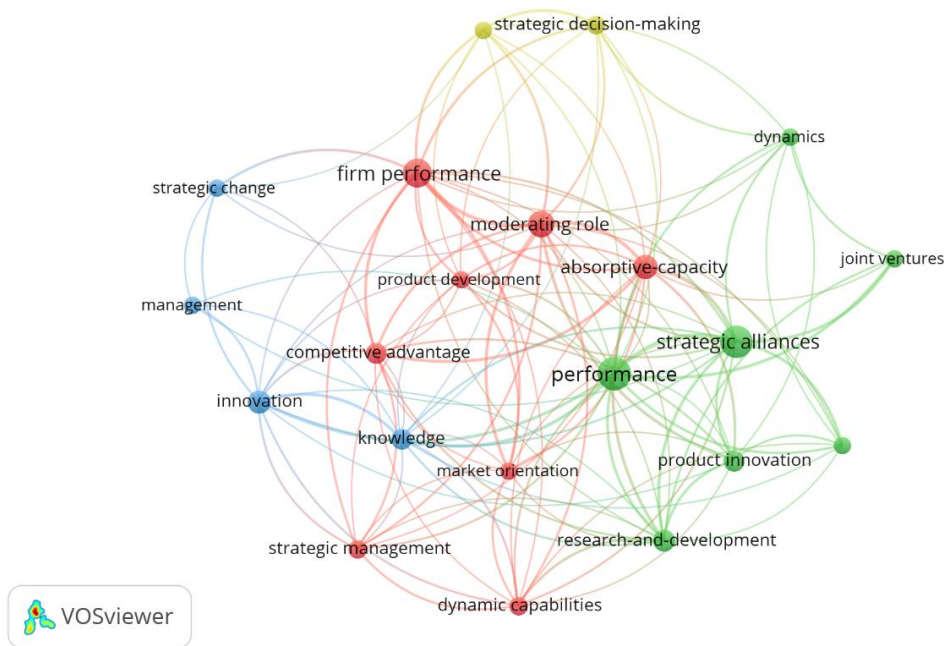
3.5. Keywords / Cartographic Analysis

The keyword analysis (Fig. 4) was conducted to conceptualize the dynamics and evolution of bibliometric studies in SP (Waltman, 2010). The process begins by inserting all the data in

VOSviewer through an RSI file with the following parameters: (1) co-occurrence was added to the type of analysis, (2) total counting, and (3) keywords as a unit of analysis to elaborate the network, filtered a threshold with a minimum of 5 occurrences per keyword, 21 keywords included in the threshold giving a result of 428 total link strength.

Considering the created network, we observed the clusters that can be influenced by SP. The cluster highlighted in red indicates performance, this is a factor that can be evaluated by the right or wrong used of SP. In blue is see the moderating role and understand its importance in the creation of planning and how it's going to be conducted. For last, in green appeals to the competitive advantage as a result of a well-executed SP.

Figure 4: Keywords analysis



Source: VOSviewer (Version 1.6.17)

4. Strategic Planning Propositions – Main Themes

Next, formal propositions regarding the drivers of SP state-of-the-art pitfalls are made. These propositions are based on existing literature research. These propositions can be found in Fig. 5:

4.1. Processes Complexity (P1)

Mikkelsen (2021) refers to bureaucracy as a workforce capability problem that challenges the ability of workers in the organizations with the demands of its tasks now and in the future. The term integrates with several mechanisms, among them written regulations and rules, procedures for advancement and selection of officials, and specialized staff with the purpose of maintaining these same rules and policies (Meyer, 2015).

However, it was brought to the attention of scholars (Silva, 2017; Khanin, 2020; Posch, 2020) that the excessive bureaucracy in processes could make SP inconsistent with its objectives (Meyer, 2015), the human capital instead of showing professionalism turns out to be lack tolerance in ambiguity and present great incapability of taking control of unstructured situations (Harvey, 2013), and the technological delays harming growth performance (Spinesi, 2009).

4.2. People's unwillingness to change (P2)

In the organizational context, employee change can be the major obstacle to the successful introduction of new practices and structures. This is shown behaviorally in workers' reactions regarding cognitive changes in their beliefs and any affection about the situation or environment in the organization. This lack of flexibility and fear of the unknown can be identified as factors increasing resistance (Agrawal, 2021).

Nevertheless, it can be assumed that these employees have organizational dysfunctions due to their inability to adapt to the situations creating constraints that can be explained by the prevented participation in the decision-making related to changes or impositions, conflict of interests, values, and norms promoted to restructuring, and when the change is perceived to disrupt the existing relation or cohesion (Pearse, 2010).

4.3. Data misreading (P3)

Data sets are getting created day by day with improved features and accurate information related to the real world (Tawar, 2020; Yang, 2022). In that sense, SP needs to have enough flexibility to outline numerous approaches in processes to test, modulate, interpret, and data processing to surpass the day-by-day challenges (Jalajakshi, 2022).

Silva (2017; Khanin, 2020) refers to that inability of management to understand the obtained data leading to error repetition, retrieving wrong conclusions due to communications

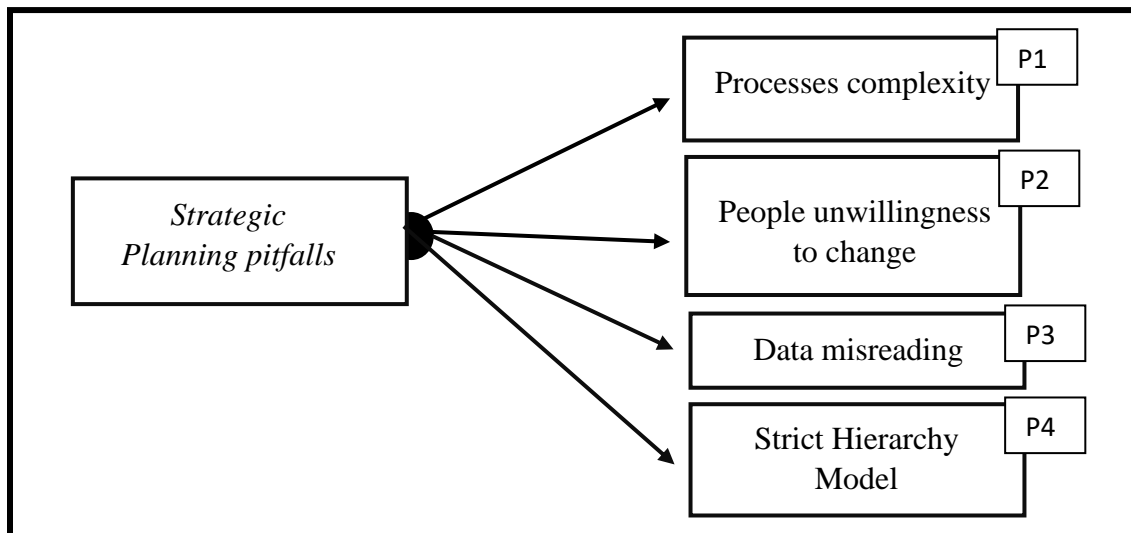
errors creating flaws in logic used to connect results to conclusions, and poor design that comes from deficient data analysis (Brown, 2018).

4.4. *Strict Hierarchy model (P4)*

Top management has an important role in shaping the organization, and its commitment and involvement should be multifaceted and not limited only to the degree that only CEOs and directors participate in decision-making putting aside the remaining stakeholders (Tzempelikos, 2015). Although the reform has been highly complex and challenging (Wang, 2020), SP needs to break the barriers between top management and the remaining levels.

This breach in the organizational environment leads to gaps in internationalization, environment dynamism, decentralization of power, innovation, growth, international risk management, and behavioral integration (Aboramadan, 2020).

Figure 5: Strategic planning propositions



Source: Own elaboration

5. Discussion

The theoretical framework analysis collected the most pertinent information from the publications regarding SP in the 90s. This knowledge was extracted from each article contributing with following information: (1) the lack of management skills needed to uplift the organization,

(2) the reduced employee participation in an organization, (3) the need for update skills and competencies, (4) the bureaucracy involved in processes limiting its progress, (5) the inability to understand information and how to act regarding decision-making, (6) take measures to understand resistance to change, and (7) the incapability to use SP tools and (8) shallow knowledge about the market changes shown in table 1.

A significant contribution was given by the research method which, helps understand the past and current stages of SP, the characterization of articles under study (Fig. 2) can determine what areas were more prominent to SP, the characterization of citations (Fig. 3), and what publications subscribe to the theoretical framework (table 5), contributing to the understanding of the relevance of SP from the 90s until today.

These variables contribute to a broader perspective of what pitfalls were involved in SP and what type of barriers organizations had to face to sustain their operations and competitiveness. Through the analysis of the theoretical framework regarding the pitfalls found in the 90s it is determined that SP started to fall from its pedestal due to managers confusing real vision with the manipulation of numbers and the have into consideration that the successful strategies are visions, not plans (Mintzberg, 1994).

Despite the management team having a crucial task during the creation and development of plans to achieve organizational goals, it remains clear to Langley (1998) that formal SP is no replacement for strategic decision making, becoming problematic due to the constant changes in markets and the rapid developments inside organizations to which sometimes, cannot detail those quick decisions in planning.

With the evolution of management tools and techniques in the organizations, employees in minor management levels need constant follow-up, time to adapt to processes and develop new competencies. Due to the disengagement of top management (Porter, 1980; Steiner, 1980; Mintzberg, 1994), these remaining levels start to feel a lack of support, creating resistance to change, abandoning the outlined planning creating more difficulties to the organization unable to rely upon the original structured SP.

Following the changes of times, the research leads us to SP and the new paradigm in society 5.0, which is more prominent to be a human-centered society with a higher degree of merging cyberspace and physical space. Analyzing SP pitfalls found in table 2 uncovered that organizations need to create a mechanism to increase employee participation (Netland, 2016; Silva, 2017; Gallo,

2019; Posch, 2020) in the processes. At the same time while continue to ensure that work-life balance, social problems, and quality of life are integrated with the organizational SP which becomes a fundamental role in their behavior and future perspectives.

Netland (2016) brought the reinforcement of training which can lead to the inability to deal with or read the information (Khanin, 2020) creating more difficulties regarding the use of digital technologies fields or new processes restricting the innovation process. Although brought up in the 90s, the relation between top management and its co-workers is an ongoing issue (Netland, 2016; Karin, 2020) that needs to be corrected because the sense of belonging it will be, more positive will be the support of all stakeholders.

Silva (2017) also calls attention to bureaucracy level inside the organizations that strategic constraint planning, instead of creating faster solutions that will help surpass any adverse situations, delay, and create more disturbance. In that sense, SP needs to be made with attention to what processes are related to the organization and what ideas workers have to facilitate their tasks.

Although planning is a guideline to which organizations can lead their objectives, when it starts to take another proportion, top management tends to dissociate between planning and (Vieira, 2020) management becoming more accessible to rely on their expertise than (re)structured the SP. Lastly, the effects of SP tools (Gallo, 2019) concerning the data analysis and the posterior conclusions taken to add to planning, although it was discovered by Gandrita and Rosado (2019) that those same tools are outdated. It is necessary to relate other technological tools to SP to have more reliable sources contributing to better decision-making as time progresses.

With the characterization of articles, it's possible to determine that in the 90s, the year with most publications is 1997, with 153 publications covering areas like banking, information systems, human capital, technology, and tourism. However, it was noticed a slight decrease during 2001-2004 in publications. The year with higher publications 2021 can be attributed to the pandemic context and the need for organizations to (re)plan their goals. Also, the confirmation that SP can integrate into other scientific areas to continue its growth.

According to Fig. 3, the significant growth in citation characterization in 2016, with 10.002 citations reaching the higher value in 2020 with 17.636 results giving more and more credibility to SP. Throughout the analysis of articles understudy and analysis of citations understudy it was possible to understand that SP is becoming more relevant in social sciences and that scholars continue to attach planning and SP to their articles.

While analyzing the theoretical framework, it was argued that the barriers of each variable regarding SP, considering the pitfalls found in recent years, arise questions regarding the best way to structure SP in organizations, the support given to all levels of management, digital technology following up, and the workforce.

Hence, these determinates can be perceived as the organization's DC (Teece et al., 1997) contributing to a business model's proficiency. This theory and strategy merge to create and refine a sustainable business model, contributing to organizational transformation (Teece, 2018). However, our research points out that businesses must consider SP barriers to overcome issues that can prevent its evolution and that the traditional managers must evolve, transformation itself into a dynamic management. This research also contributes to practitioners, more specifically, to organizational managers helping them identify the barriers and the initial focus in SP.

6. Strategic planning Implications

During our research, we could understand how planning is continuously a method that aids and drives organizations towards the future. As digital technologies continue to evolve and incorporate into companies, it is necessary to make several changes to how strategic planning must be done and what fields are required to support it.

Supported by DC theory, SP needs to include digital technologies to encounter new opportunities for new businesses, facilitate processes, and change how people do their jobs. The application of technologies such as virtual reality, big data, and artificial data will contribute to SP being more agile, acquiring more information, interpreting data, and foreseeing and equating new possibilities facilitating decision-making.

To achieve a new stage in the organization, teaching methodologies are required into redesign and redefine the business model. For this, it's essential to create singular products and services to anticipate the reaction of competitors.

Thus, the theoretical framework indicates that SP can be related to other areas. However, SP demonstrated that every member of the organization can be included and participate in planning which is a sign of their importance within the organization for the realignment structure and culture of the business model.

For future research implications, the knowledge generated about strategic planning in society 5.0 was consolidated, and the analysis results entrust some opportunities for future research. The challenges found in propositions can be addressed by CEOs, strategists, and scholars in the field of SP and society 5.0.

Table 7 highlights some research questions for future studies related to the found propositions (table 5).

Table 7: Future research questions

Processes complexity

RQ1: How can map important processes in strategic planning?

People unwillingness to change

RQ1: What can be made in strategic planning to help the workforce?

Data Misreading

RQ1: What investments can be made to improve data misreading?

Strict Hierarchy Model

RQ1: What kind of intellectual investments top management can make to improve SP?

Source: Own elaboration

7. Conclusions and Further Studies

To the best of our knowledge, this paper can be considered one of the first analysis of pitfalls from SP identified in society 5.0 influencing organizations, strategies, and planning methods. Based on our research, businesses need to reshape their planning considering the present context and the vast areas that become part of the natural evolution of the world, namely technology, digitalization, sustainability, and the environment.

One of the most sensitive topics which need special attention by top management, according to Netland (2016), Silva (2017), Gallo (2019), and Posch (2020), is to understand what

the role of employees inside organizations through the buildup of planning or digital planning will be and what cautions top management should have to support the workers.

Concerning the relevance of SP, we have resorted to the results mirrored in peer-reviewed articles registering a crescendo in the year 2004 from 215 to 411 results per year in 2021. Citations also reported the highest number in 2021 with 17.153 results indicating a growth compared with the 1993 13 results. For last, to evaluate the reliability of the construct in science, the journals and databases used gave extensive contributions and are pertinent to science.

To enhance SP proficiency in organizations, our research suggested the appliance of DC theory creates a defensible business model that allows organizations, ideally, to increase their level profits to an adequate level, becoming sustainable while elevating their resources and capabilities (Teece, 2018).

According to this theory, on the sense level it becomes relevant for the future to understand the technological possibilities that can be added into SP and how technology can be continuously developed creating business opportunities. However, according to the pitfalls found to enjoy these opportunities, managers must reduce bureaucracy in processes, technological advances require data updates, ability to deal with all the information, and have into consideration the new markets followed by technological innovations.

To seize new or changing opportunities, the design needs to be fused with the organization's SP and be constantly refined anticipating possible changes inside or outside the organizational spectrum. From a DC perspective, on the seize level it can be observed that commitment is considered one of the factors that lead to success, teams support and relations between management levels.

Following SP pitfalls, it is necessary to increase the link between top management and the remaining levels regarding support, personal confidence, communication, and building a better working team. The dissociation of planning and the lack of propensity to planning can be erased with more commitment and the sharing of ideas.

According to the dynamic theory, the transform level talks about the realignment structure and how culture needs to adjust with the organization's internal structure and overall management model. In that sense, there is a decisive necessity to eliminate the pitfall sentiment of people being replaced by technological systems, the use of tools that contribute to easier processes and help workers to perform at the highest level.

In conclusion, SP needs to continue integrating with other scientific areas to evolve, maintain relevancy, and contribute to scientific discoveries. Considering the pitfalls in society 5.0, there were found two essential dimensions which can impact most SP are human capital and technology. Also, managers should abandon the traditional structure of SP and add DC to managers scanning, learning, involve, and interpret activities

During the research it was noticed that it was a continuous necessity to make longitudinal studies to understand the status of SP regarding the evolution of society improving the construct in methods and applications to businesses.

To further research, managers can evaluate the direct and indirect effects that SP have in the organizations while measuring the advances on digital and human capital assessments in literature in general and assessing new technologies practices integrating in SP underlining advantages and disadvantages.

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Paper contributions to our research agenda

Finishing the first chapter of our study, we could acknowledge that strategic planning has become an integrated part of other areas of research and that it still contains several pitfalls in his method. Considering our research question, “*Which is the most meaningful pitfalls that needs to be addressed in strategic planning?*” it becomes clear that four variables must be addressed carefully and objectively for the organizations become more competitive. As shown above, in the propositions (Fig. 5) it is possible to understand that:

1. **The Complexity of processes** can confuse the workforce and challenge workers to deal with the new and the oldest mechanisms.
2. **People’s unwillingness to change** brings several difficulties to managers due to human relations and their inability to adapt to new situations.
3. **The data misreading** points out the need for more interpretation, retrieving the wrong conclusions, and contributing to the wrong decision-making.
4. **The strict hierarchy model** relates to the vital role of top management and what barriers are needed to surpass the challenges that level of management faces.
 1. Throughout our investigation, our findings lead us to understand that the relevance of strategic planning has grown intrinsically, especially during the pandemic stage and forward. This level of pertinence has been proven throughout the articles and citations in Fig. 2 and Fig. 3. The traditional SP has shown that it is not completely able to overcome the existing organizational constraints or pitfalls. However, with the addition of the dynamic capabilities’ method it is possible for managers to design new strategies and have them into consideration while structuring their SP.

Also, planning begins to be implied in other scientific areas to prefund scientific areas, especially the formulation of a research agenda and how SP can be linked to the digital world.

Second chapter: Strategic Planning and Top Management

Qualitative methodology

Bridging Hierarchy Levels for Strategic Planning: A Top Management Perspective

Gandrita, D. M., & Rosado, D. P. (2024). Bridging hierarchy levels for strategic planning: A top management perspective. In M. José, A. Asensio, L. Rosa, & M. Rodrigues (Eds.), *New research on leadership styles and performance* (pp. 69-88). Nova Publishers. <https://doi.org/10.52305/ZKQP3465>

Associated questions:

*How do different hierarchy levels contribute to strategic planning effectiveness?
What strategic planning processes need to change to increase its effectiveness?*

Highlights:

- Higher employee effort as a contributing factor;
- Greater effectiveness from positive relations;
- Enhanced comprehension of planning from different perspectives;
- Improved outcomes from different levels of the organization.

Bridging Hierarchy Levels for Strategic Planning: A Top Management Perspective

Abstract

Although strategic planning remains a critical aspect of organization's life, for it to be effective, all management levels must be aligned in the pursuit of strategic change. This alignment mechanism will result in competitive advantage and increased efficiency for the organization. From a dynamic capabilities' perspective, this study explores the limitations faced by top management that hinder strategic planning, as well as the need to adapt processes to engage individuals from different hierarchy levels in strategic planning for greater effectiveness. A qualitative approach was taken, and a bibliometric analysis was carried out using articles from the Web of Science and the B-On database to gather relevant information on the topic. The contributions of $n=26$ top management executives help us deepen the knowledge on the topic under study. On a practical level, this study addresses the lack of top management involvement, and it focuses on external variables related to the organizational environment. This study offers insights into top management actions and critical competencies contributing to the organization's success in addressing future challenges. Our findings highlight the efforts of employees in top management response, the impacts of positive relations, the integration of different perspectives to enhance strategic planning, and the organizational outcomes across hierarchical levels.

Keywords: Dynamic capabilities; strategic planning; strategy; top management; teams' management.

JEL classification: M1; M10; M2; M2; L1.

1. Introduction

Strategic planning is widely recognized as an important tool for organizational development in the current rapidly changing and uncertain world (Krier, 2022; Weston, 2022). This systematic

and deliberate process assists organizations in the determination towards the achievement of a desirable future (Amrollahi, 2018).

Through strategic planning, organizations can adapt to new realities of the business environment and formalize their plans (Bolland, 2020). However, this formalization often means that strategic planning is primarily conducted by key executives rather than involving employees throughout the organization (Azapagic et al, 2016; Broman, 2017; Bolland, 2020; Afum et al., 2021). Top management plays a crucial role in translating goals into actions by establishing policies and restructuring the organization to ensure project success (Dubey, 2017; Liu, 2019).

However, due to the dynamic nature of top management's role, there may be a lack of involvement in workforce-related issues (Boiral, 2009, Yiing, 2009, Renwick, 2012; Jabbour, 2013). Researchers have noted this gap in strategic planning, attributing it to the lack of commitment and participation of top management in decision-making and organizational activities (Khanin, 2020; Gallo, 2019; Netland, 2016; Bonn, 1996; and Mintzberg, 1994).

To address this issue and improve organizational effectiveness and performance, it is necessary to analyze the role of top management so that the outcome of financial success, the development of a strong competitive force and long-term growth for the organization can be achieved (Espinilla et al., 2013). This study understands the constraints faced by

top management that hinders strategic planning, as well as the need to adapt processes to engage individuals from different levels of management in the processes can enhance effectiveness. for greater effectiveness. A qualitative research design was used, gathering information from 26 figures related to top management. A bibliometric study using the PRISMA method was carried out to further analyze the topic, gather relevant data to support the literature review and triangulate with the data collected.

The findings will be triangulated and compared to a literature review leading to a discussion and conclusion. The study will also provide theoretical and practical implications and identify limitations and future research.

2. Theoretical Framework and Research Hypotheses

2.1. Strategic Planning Effectiveness

In the existing literature, it is possible to find countless definitions and theories of the strategic planning concept, which has been studied and become a part of several disciplines (Sousa, 2021). This administrative technique is often used to guide managers in their organizational decisions through the definition of long-term (Puglieri, 2022) competitive strategies avoiding internal weakness and external threats and retrieving the maximum inner strengths and external opportunities (Hernandez, 2022).

The effectiveness of strategic planning is translated into high-performance benefits, thus encouraging managers and policymakers to engage with it and ensure that their processes continue to be comprehensive and formal to enhance organizational competitiveness (George et al., 2019). Due to the efficacy that strategic planning brings to business organizations and environments its transition and formalization are translated into more concentration and processes by top management rather than mainstream employees (Bolland, 2020).

When applying the concept of strategic planning to the organizational context (Biswakarma, 2018; Milliman et al., 2018) the encounter definitions point out systematically to a process of determining the course or direction of actions for achieving the desirable envisioned future delineating the desired state and transparent path, and priorities in the form of a written set of goals, actions, objectives, and outcomes to achieve in the long run (Mintzberg, 1994; Elbanna, 2015; Weston, 2019).

Furthermore, to attain thorough and efficient planning, managers must incorporate a range of perspectives and inputs, such as knowledge sharing, resources, and assets, equitable partnerships, and collaboration (Oridota, 2023). Consistent with this notion, previous research has provided evidence for a positive correlation between effectiveness and the integration of multiple perspectives, which will enhance the definition and application of strategies, bolstering TM and team members satisfaction (Ku et al., 2015). Therefore, the subsequent hypothesis is:

H1: The synergistic integration of varied insights enhances the comprehension of an effective strategic plan.

2.2. Positive relations lead to higher effectiveness

The COVID-19 crisis has created new challenges for the strategic planning approach, necessitating thoughtful reconsideration to address the urgency and complexity of the emerging issues (Weston, 2022). In this context, an effective relationship with internal stakeholders has become vital for organizations and their leaders. TMT is comprised of a small group of leaders that are at the top of an organization and impact directly on strategic choices (Cho, 2006) in which they perform several tasks that are non-routine and invariably complex (Nadkarni, 2008). Their primary job “as the head” of the organization is to allocate resources and developed a game plan for the implementation of their strategies (Mason, 1984).

Recent literature stressed the relevance of middle managers in strategic decision-making embracing the operating core and strategic apex (Glaser, 2021). The role of these middle managers can be related to the experiment with new practices and championing them as top management members (Fernández-Mesa, 2023). For last, the Lower management has the responsibility of ensuring that planning is applied, solving production problems, distributing resources to each team and individual, and anticipating situations that could affect the daily operation (Kaiser, 2011).

The main goal for these levels is to introduce new strategies and create a long-term profitable organization with competitive characteristics. However, some leaders argue that effectiveness can be achieved by providing positive interaction with employees and engaging in socioemotional and person-oriented relationships. Such behavior characterized by positive relations and concern for employees’ needs is typically as showing appreciation and providing support (Beck, 2009).

On the other hand, the leader who presents negative task feedback and maintains a lack of relationship. This behavior contributes to a significant discrepancy between the actual and desired task-based performance (Cianci, 2010; Smither, 2002).

H2: Positive relations between management levels lead to higher effectiveness than a distant relationship with no attachment

2.3. Top management and employee's relationship for higher effort

Although most researchers tend to focus on top management perspectives (Hassi, 2015), the perceptions of the lower management had been largely ignored (Levenson, 2009). Yet, several studies have shown that employee's insights can be a telling indicator of the veridical contrast and the effects that have on organization's (Allen, 2007).

As a response to the disregard of employee insights and considering that employees are a group of stakeholders that are vital to the success of the organization (Edmans, 2012), it is constantly seeing that the lower level of quality in the workplace can feature and provoke a negative outcome, namely, a lower work satisfaction, lower job productivity, poorer health, higher mental fatigue (Bellini, 2015).

Also, after a review of top management behavior, it comes to Hight (2019) attention that on some occasions, there are managers that listen to employee feedback but rarely act upon that discussion, and those that were unapproachable are not open to any feedback. After this exchange occurred, the author stated that managers neglected to follow through with executing any changes to the department.

This process of suppressing internal conflict concerning the relationship between employees and employers (Mordi, 2020) it's a path that needs continuous improvement, in that matter Brockman (2020) gives its contribution affirming that organization's need to invest in their workforce to facilitate production and the creation of a reliable base which employees can express their dissatisfaction.

This state of disappointment is associated with the personal value system applied by top management and as a result, elevated costs for the organization in terms of recruitment, training new employees, and selection (Halkos, 2017).

From the perspective of establishing a new bridge between hierarchy levels enabling a better comprehension of the effectiveness of strategic planning, thereby allowing the establishment of more opportunities, sensing new dimensions, and reconfiguring organizational resources. For example, the employee and stakeholders' involvement and effort could lead to greater integration in problem-solving and discussions contributing to the drawing of their knowledge of customers, products, and practices (Karlsson, 2015).

Another finding related to the topic withdrawn from Engen's (2021) research suggests attention needs to be paid to how to leverage the outcomes of the workforce situated activities and engage them in activities on a broader scale. This leads to the following hypothesis (H3), which puts the possibility for top management let employees participate in strategic planning (Dubey, 2017).

H3: *In the presence of a higher effort from employees to acquire new skills contributing to the firm, top management feels more open to letting them participate.*

2.4. Dynamic capabilities improvement from various levels

The dynamic capabilities approach addresses organization's abnormal returns under certain conditions of environmental change and uncertainty (Teece, 1997). Remarkably, this theory argues that acquiring strategic advantage hold of unique capabilities or resources is not enough, rather, it becomes necessary to reconfigure and relocate these abilities and resources to address environmental changes (Teece, 2007).

Zollo and Winter (2002) also used the concept of organizational learning to explain dynamic capabilities as a stable and learned pattern of cooperative activity through which the organization is systematically generating and modifying its routines in pursuit of better effectiveness.

In previous research, dynamic capabilities have shown an essential role concerning the organization capacity to seize opportunities, sense, and make the necessary resource base adjustments (Wilden, 2018). Cooper (2016) and Magistretti, (2021) also added that the goal is to assess the influence of t a different set of capabilities on the value generated by the encountered solutions.

There were identified three stages in dynamic capabilities – (1) sensing the environmental impacts, (2) realigning and reconfiguring its resources, and (3) implementing effective strategies to respond to alignment changes (Chan, 2011). The first part of the process concerns the external (i.e., outside-in) organization, which the team needs to sense the opportunities available (Jadhav, 2022). The second alert the need for strategy and plans that may require it to make changes to, or reconfigure an organization's resources. For last, organization can acquire new skills, define new

processes, develop new capabilities, assign new roles to respond to the changes and apply the designated strategy (Jadhav, 2022).

Although dynamic capabilities have been proven over time its diversification in literature, during our research, we could find that the so called dynamic managerial capabilities impacted the role of managers (Holzmayer, 2020), defined as the ability which each manager integrates, build, and reconfigure organizational competencies, and resources (Adner, 2003).

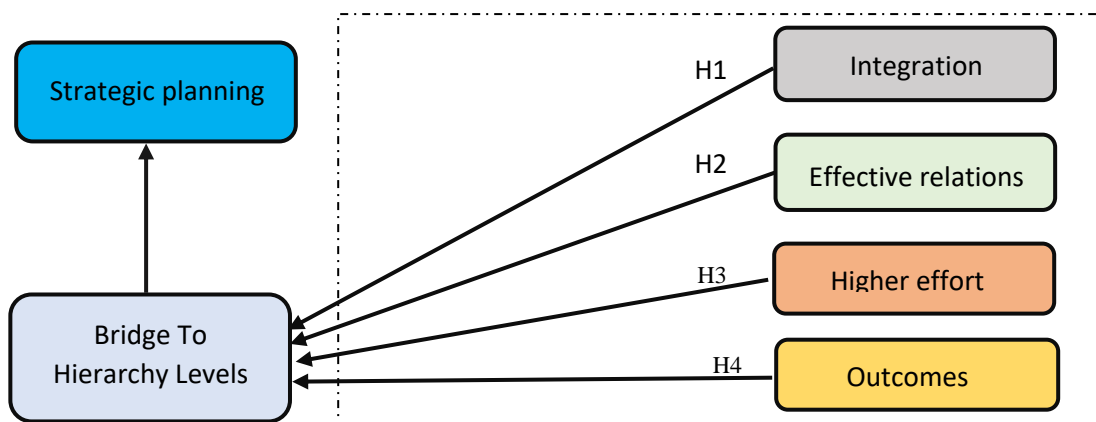
Thus, according to Petit (2012), it was possible to understand that there are two main aspects between dynamic capabilities and top management. The ability to renew an organization's competencies in the face of changes in business environments and the key role of top management in integrating, reconfiguring, and changing both resources and capabilities to address organizational changes.

As we continue to uncover dynamic capabilities, it becomes evident that this approach has improved organizational outcomes. However, for this to be effective, each actor must contribute their part, ensuring that the goals outlined in strategic planning.

H4: Improved organization outcomes result from the contributions of individuals at various levels of the organizational hierarchy.

Based on these assumptions, we proposed the following hypothesis and research model (Fig. 1):

Figure 1: Conceptual framework of the study



Source: Own elaboration

3. Methodology

3.1. Research method

To determine the challenges and trends and map the contributions of top management in the field of strategic planning, Table 1 presents the following structure.

Table 1: Research steps

Steps	Activities	Results
Step 1: Problem Definition	(ii) Gap identification (ii) Formulation of the research	The limitations faced by top management hinder strategic planning, as well as the need to adapt processes to engage individuals from different hierarchy levels in strategic planning for greater effectiveness.
Step 2: Systematic Literature Review	Prisma methodology (Table 1), according to the three main stages: (i) Identification: (a) Structuring the keyword from the thematic axes “Dynamic capabilities”, “strategic planning”, “strategy”, “top management”, and “team management”. (b) definition of the research protocol (search for the keywords, definition of the databases, publication type publication years, document types, categories); (c) deletion of duplicated papers; (d) inclusion and exclusion papers; (ii) Screening: (a)	The final pull of papers: 81 papers. These explicitly discuss the challenges and contributions related to the subject of study.

Reading the title and abstract of papers to identify those that are not aligned with the purpose of the papers and should be excluded; (b) Read the full papers to exclude those that have in consideration the purpose of this research; (iii) Included: (a) Description of the final pull of papers.

Step 3:
Bibliometric
Analysis

- (i) Use the keywords to start the search, compiling/refinement the database; (ii) Development of tables for descriptive analysis; (iii) Export the database to Excel and a RIS file to VOSviewer; (iv) Generate the VOSviewer network.

Characterizing the paper portfolio (evolution of publications, main journals, and leading authors). And network analysis (full counting and authors).

Step 3:
Content
Analysis

- (i) Build the literature framework; (ii) Preliminary analysis of the main themes in the portfolio contributes to the mapping of keywords network; (iii) the discussion among researchers and data.

Analysis of 81 research papers and the creation of a network with the respective sub-groups. Consolidation of the theoretical framework identifying the hypothesis.

Step 5:
Construction of the
Framework

- (i) Selection of the results from previous steps, allowing the production of insights by the research team; (ii) Mapping the

The unification of the results using a theoretical framework identifying strategic planning from a

information regarding the
study.

top management
perspective.

Source. Own Elaboration

The problem definition (Step 1) allows us to elucidate our research questions:

- *RQ1: How do different hierarchy levels contribute to strategic planning effectiveness from a top management perspective?*
- *RQ2: What strategic planning processes needs to change to increase its effectiveness?*

A systematic literature review will be carried out using the PRISMA methodology to address the issues raised in this research and to identify relevant literature. The analysis of the results is based on two methods. The first a bibliometric analysis and the second is content analysis.

The literature review enables the mapping of the state of the art on the subject of study, allowing SP relations with top management leading to higher effectiveness, top management relationship with employees, and the aid of SP with dynamic capabilities improvement. The content analysis will allow us to identify essential topics and perspectives on the subject and understand the challenges that need to be addressed in a theoretical framework about top management.

3.2. Literature Review

Concerning the generation of results to be analyzed, one of the analyses performed is bibliometric, this method involves a qualitative analysis of publications (Ellegaard, 2015), allowing us to determine the state of the art on the subject. Treinta (2014) defines bibliometric analysis as identifying what has been produced by researchers and the scientific community, thus evaluating the trend in the subject area.

3.3. Data Gathering

The first stage (Identification) includes the identification of literature by searching the selected databases. For this work, the selected were Web of Science and Science Direct owing to a high level of relevance in publications to the object of study. Only peer-reviewed articles were considered relevant.

The survey started by combining the search terms related to the article keywords: “*Dynamic capabilities*”AND “*strategic planning*” OR “*strategy*”AND “*top management*”AND “*team management*.” The variety of terms translates the search axes, the Boolean index “AND” was used to make the search connections and “OR” for the returns of alternative or synonyms terms in the same axes search. The use of Boolean indices improves the probability of searching relevant documents. According to the filters and other sources (papers references), the search in the databases was conducted in 2022 and did not have any specific duration time. Table 2 presents the search protocol, search strategy, search terms, database, document types, publication type, and language.

Table 2: Research Protocol

Search Term (Title, Abstract, or Keywords).	“Dynamic Capabilities”; “Strategic Planning”, “Strategy”; “Top Management”; “Team Management”.
Search Strategy	“AND”; “OR”
Database	Web of Science and Science Direct
Publication Type	Reviewed Papers and Research Papers
Language	English
Date	1986-2023
Publication Titles	319 results/25 Journals
Search Period	Not Specific

Source: Own elaboration

The collection of the initial search gives us a total of 2,093 results. Refinement of our search by Management categories gave a total of 1,178 articles. The refinement by document types,

namely articles, gives a total of 969 results. Selecting English as the primary language gives 960 results. Filtered by publication titles (table 3) we obtained 319 results.

Table 3: Journals and number of articles

Journal	N° of articles
<i>Long Range Planning</i>	45
<i>Academy of Management Journal</i>	23
<i>Sustainability</i>	20
<i>Management Decision</i>	18
<i>Journal of Business Research</i>	32
<i>Journal of Management</i>	17
<i>Strategic Management Journal</i>	13
<i>Science Organization</i>	13
<i>Journal of Small Business Management</i>	11
<i>European Management Journal</i>	9
<i>Journal of Strategy and Management</i>	9
<i>Business Horizons</i>	8
<i>Global Strategy Journal</i>	8
<i>Journal of World Business</i>	8
<i>British Journal of Management</i>	7
<i>Academy Management Review</i>	6
<i>Technovation</i>	6
<i>European Business Review</i>	5
<i>R D Management</i>	4
<i>Harvard Business Review</i>	2
<i>Economies</i>	1
<i>California Management Review</i>	1
<i>Management Science</i>	2
<i>Sage Open</i>	2

<i>Journal of Cleaner Production</i>	2
25 Journals	319 results

Source. Own Elaboration

The second stage (screening) included selecting the papers by reading the abstract and title and verifying if the research paper is related to the aim of the study. In this phase, we confirmed if the terms top management, dynamic capabilities, and strategic planning were mentioned, in addition to their synonyms, reducing the final pull of papers to 81 results.

An important note regarding this selection is that the papers were found using a snowball method. Therefore, papers that contribute to and explicitly discuss the development of top management in strategic planning, considering this information, a total of 81 articles were selected. In Fig. 2, we present the path to the final portfolio showing the qualitative data from the inclusion and exclusion files according to PRISMA methodology steps.

3.3.1. Inclusion Criteria

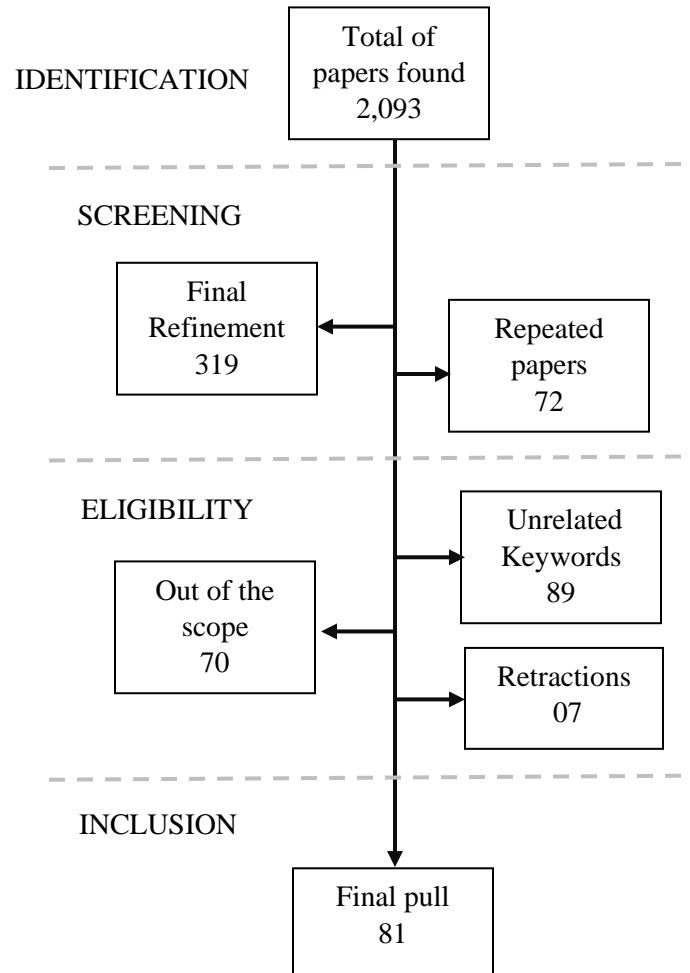
For this research, peer-reviewed journals were considered as a thrust source of knowledge. We kept out this study blogs, thesis, editorial notes, white papers, and book chapters. To maintain the study's publications and work an inclusion criterion was included corresponding to the selected keywords.

3.3.2. Exclusion Criteria

Considering the exclusion criteria, we rejected several articles that did not present any practical application of theoretical information that contributed to our research or to answer our research question, in that sense, we have ruled out:

- Ex1 Articles focused on strategic thinking;
- Ex2 Articles with specific relation to supply management;
- Ex3 Articles focus on medical research;
- Ex4 Articles with specific relation to a particular industry.

Figure 2: Methodology phases



Source: Own elaboration

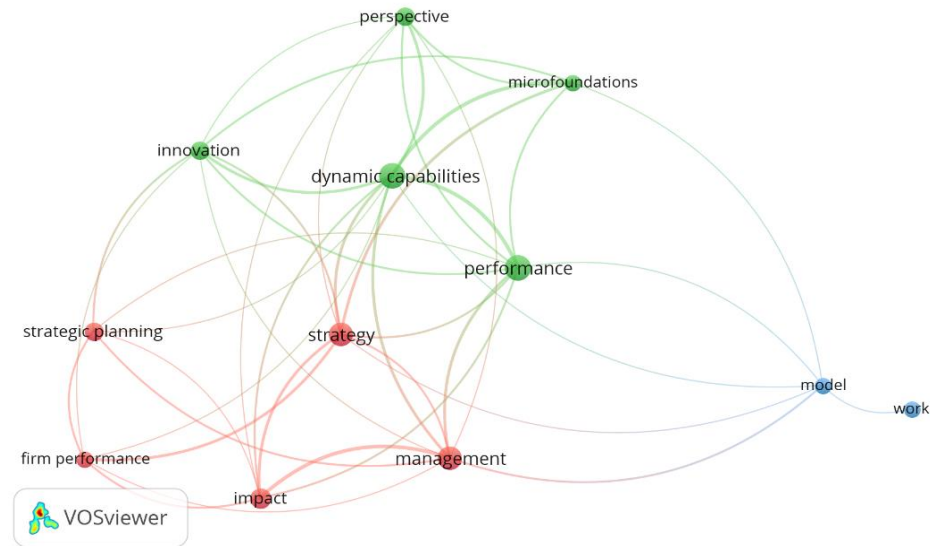
3.4. Co-occurrence of Keywords

This analysis of the co-occurrence of keywords was performed by VOSviewer (Version 1.6.17) software to understand the keywords used by the final pull of papers. The constructed co-occurrence of keywords created a network giving 447 keywords of which, only 12 meet the threshold (Fig. 3).

From the formed network, it is possible to observe that the three large clusters (Red, Green, and Blue), show SP with 6 links, DC has 10 links, and Model with the weakest connection it has 6 links. However, that value is related to the other two clusters. Furthermore, while creating our

map, it becomes perceptible that the keywords are related to our research demonstrating the level of connection to the research topic.

Figure 3: Co-occurrence of keywords



Source: VOSviewer (Version 1.6.17)

4. Data Analysis

4.1. Design

To conduct this research, a qualitative method will be used through a descriptive phenomenological (Moser, 2017; Varpio, 2019) approach to understand other peoples lived experiences and perspectives. Phenomenology aims to study the occurrences based on each understanding of human experience (Dowling, 2007) contributing to the future and effectiveness of the company. To consider subjective experiences, we assume a certain attitude of attentive openness and readiness for a proper understanding to properly understand the unique meaning of participants' organizational experiences (Norlyk, 2010; Dowling, 2007). Also, this method is ideal for interpreting and describing a particular setting while translating the understanding gained to other contexts (Spencer, 2009; Thomson, 2009).

4.2. Setting and Population

We used purposive sampling to recruit a diverse group of top managers who had vast experience in planning or conceptualizing planning in their company. We continued sampling and collecting data until the ongoing analysis revealed no new information (a phenomenon “known as information redundancy”) (Moser, 2018).

Employer representative target: In our research, we count on top management, executives, and strategists who provide their insights on the subject of study discussing how to achieve company objectives and potential changes in the company portfolio. Strategists who study organizational themes profusely and produce strategic plans. Executives that share their perspectives on achieving goals and creating relations with coworkers.

4.3. Sampling

We selected organizations with 100 employees to attach to several areas. The ages of these board members vary between 27 and 59 years old and all the interviewees were notified of the confidentiality and anonymity of their data. To achieve maximum variation, the organization’s chosen were public, private, or non-profit, geographical dispersion (nation, local), and different economic sectors (Education, science and technology, food area, engineering, communications, installation, repair, and maintenance).

Three companies declined to participate in our study, causing a lack of time to answer our questions and two were impaired due to a lack of representation.

4.4. Datta Collection

This study employed a phenomenological design and used semi-structured interviews with open-ended questions to capture the lived experiences of each participant. The question guide was developed based on a review of relevant literature and the researchers' insights. Prompts were used during the face-to-face interviews, zoom meetings, and workplace to encourage participants to provide more detail and to help resolve any remaining questions.

The interviews were conducted in Portuguese and English between November 2022 and January 2023. This study did not use other methods such as in-depth interviews and field research. Before the interview, every participant knew the rules and agreed with them, the median duration

was 45 minutes. The interviews were audio-recorded, transcribed to Word, and identified the answers with relevant information.

The interviewer assured the quality of each transcription, starting with a simple question, re-listening, and starting the actual interview. After we identified the relevant topics and shared them with the interviewers, they realized that some changes needed to be made and that it was necessary to have another approach to some issues.

For our qualitative analysis, we use MAXQDA (Verbi GmbH) software for harmonization of the code and retrieving relevant information that allows us to have valued data.

5. Results

In Table 4. we present the participants characteristics. The selected companies varied in ownership (19 private, 6 public, and 1 non-profit), geographical allocation (7 national and 19 international), the size (17 small, 3 medium, and 6 large), regarding the economic sector, we could find that our respondents are integrated into areas like Education, Technology and Science, Communications, the Food industry, Installation, Repair, and Maintenance, Health, and Management.

Table 4: Organization Characteristics

Organization's Characteristics	N° of organization's
Employer type (Ownership)	
Private	19
Public	6
Non-Profit	1
Geographical allocation	
National	7
International	19
Economic Size	
<500	17
500-999	3

>1000	6
Sector	
Education	3
Technology and Science	12
Communications	3
Food Industry	4
Installation, Repair, and Maintenance	1
Health	1
Management	2

Source: Own Elaboration

In Table 5, we applied the participants' characteristics. They were started by gender (8 Females and 18 Males), ages (15 with 18-25 years old, 6 with 26-35 years old, 3 with 36-45 years old, and 2 with 46-55 years old). The roles of each participant are divided by their role inside the organization (5 CEOs, 8 CEO representatives, 5 Executive Board members, and 7 Strategists).

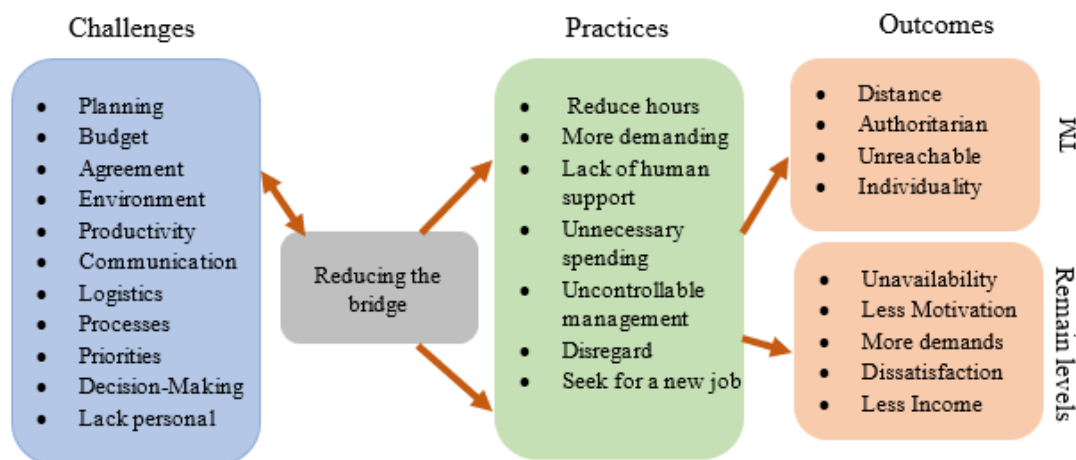
Table 5: Participants' characteristics

Interviewed Characteristics	Nº of participants
Gender	
Female	8
Male	18
Age	
18-25	15
26-35	6
36-45	3
46-55	2
Role	
CEO	5
CEO representative	8
Executive Board	5

Source: Own elaboration

Fig. 4 were identified some of the challenges, practices, and outcomes related to our sample. These were described by top management represent if no actions are developed. The first illustration identifies the challenges (Panel A) determined by our results, the second the practices related to those challenges (Panel B), and the Outcomes from different perspectives (Panel C).

Figure 4: Challenges, Practices, and Outcomes



Source: Own elaboration

5.1. Hypothesis Development

H1: *The synergistic integration of varied insights enhances the comprehension of an effective strategic plan.*

Strategic planning involves a systematic process of determining the direction or course of action to achieve the desired future for an organization (Elbanna, 2015; Mintzberg, 1994; Weston, 2019). While the core definition remains unchanged, perspectives and contexts have evolved over the years, prompting managers to make significant changes that facilitate organizational evolution. During our investigation, it becomes evident that not everyone is receptive to external insights, and not all individuals are willing to participate in company initiatives. However, we identified seven distinct perspectives that underscore the importance of participation in meetings and

contributing ideas to build and improve projects (Perspective 1). These perspectives include the influence of each member in relation on a project development and product creation (Perspective 2), awareness of an investment reviewed technologies cybersecurity to ensure company infrastructure and safety (Perspective 3), enhancing product safety to build customer trust and soliciting feedback (Perspective 4), gathering data, setting verifiable goals, and building accountability (Perspective 5), placing individuals in suitable roles and fostering their growth and development (Perspective 6), and providing suggestions for new market areas to invest, as well as the development of new solutions, trends, and proactive approaches (Perspective 7).

H2: Positive relations between management levels lead to higher effectiveness compared to a distant relationship with no attachment.

Management relations are recognized as the initial step (Chaudhuri, 2018) in facilitating higher organizational effectiveness. According to this hypothesis, positive relations can foster better communication among management levels and increase accessibility to other opportunities. Communication, as a variable, has been identified as the most significant factor in increasing proficiency. Positive relations can also be observed among individuals working in the same area of expertise, as they share the same tribulations and experiences. Cooperation towards a common task or goal is another variable that can contribute to positive relations, ultimately benefiting the entire organization and enhancing its competitiveness. Considering this, it becomes apparent that although top management is often perceived as a distant and authoritative position relative to other management levels, they should make an effort to establish positive relationships. This is crucial to preventing non-existent relationships among employees, which can result in diminished effort in their tasks, lack of involvement in organizational operations or planning, failure to fulfill responsibilities accurately, and an inability to meet deadlines.

H3: In the presence of a higher effort from employees to acquire new skills contributing to the firm, top management feels more open to letting them participate.

The above section discusses the efforts of employees to acquire new skills which in a long-term contribution to the organization, as well as the importance of recognizing employees by

involving them in strategic planning or the most meaningful actions within the organization. This was verified by 69,2% of the sample, suggesting that the employee needs to show initiative and a strong willingness to help the company. The first step in this process occurs when employees acquire new competencies that can be applied to their job or other area related to the organization. Combining new theoretical knowledge with the acquired experience can maximize their performance. As a result, top management recognizes and values these actions, leading to increased participation and insights from employees within the organization. Moreover, when employees are credited for their contributions over time, the impact becomes increasingly positive for everyone involved as credit is giving thought to time the impact begins to be positive for everyone involved. This leads to a higher level of passion for projects and increased effort from employees, as they begin to believe that their effort is meaningful and worthwhile. This, in turn, creates a sense of progression, pride, higher focus, and goal oriented.

On the other side, the remaining 30,8% require assistance in aligning their efforts with the organization or top management. In some cases, thrust issues may arise, indicating an unsuccessful long-term relationship and an inability, from the employee perspective, for top management to assume their mistakes and misjudgments.

***H4:** Improved organization outcomes result from the contributions of individuals at various levels of the organizational hierarchy.*

In Fig. 4 (challenges, practices, and outcomes), it becomes evident that various challenges related to management levels have a significant impact on the organization and how each member responds to them. To enhance effectiveness and bridge the gap between management levels, communication between the levels is crucial. In certain situations, the implementation of ADM (accessibility for direct messages) is recommended, along with group messages that allow workers at all levels to stay informed about organizational developments. This initiative fosters the sharing of ideas and encourages openness to others' perspectives, accepting valid contributions that can be applied to the current situation. Both top management and middle management need to establish a culture of trust, providing clear guidance on employee techniques and task methodologies, and acknowledging and respecting efforts. Consequently, this will increase motivation levels and lead to greater employee satisfaction, ultimately creating new growth opportunities. The issue of wages

should be addressed from a performance perspective, recognizing those who make significant contributions and actively seeking ways to benefit the organization. This recognition serves as an indicator of consistency and value.

6. Discussion and Conclusion

The qualitative study aimed to contribute to filling the gap in understanding top management's perception of strategic planning, specifically focusing on (1) their perspective on different hierarchy levels and (2) the necessary adaptation and adjustments required at different management levels to enhance effectiveness. As we progressed with our research and analyzed the results, it became evident that organizations need to pursue competitive strategies by addressing internal weaknesses, external threats, and maximizing their internal strengths and external opportunities (Hernandez, 2022). This aligns with our first hypothesis, which identified seven perspectives emphasizing the importance of participation in meetings and contributing ideas to build and improve projects, ultimately the direction of actions toward desired goals (Mintzberg, 1994; Elbanna, 2015; Weston, 2019).

Additionally, our study confirmed the understanding among top management that positive relationships within the organization are essential for enhancing competitiveness (Beck, 2009). This was supported by our second hypothesis revealing that employees seek clarity on organizational goals and metrics to provide them with more opportunities and options, while top management desires greater cooperation and proficiency in the workplace, fostering a proactive attitude. To achieve this, top management recognizes that communication, cooperation, and relationship-building are key. It is important to note that relationships are an ongoing process that requires continuous improvement (Brockman, 2020), and addressing internal conflicts related to the top management-employee relationship is crucial (Mordi, 2020).

Considering our third hypothesis, we found that positive relationships often begin with the attitudes of employees, their proficiency, and their ability to contribute SP with their newly acquired skills. Throughout our research, we observed that top management values employees who demonstrate initiative and a strong willingness to help the company. This begins with the acquisition of knowledge and application of expertise in daily operations, ultimately contributing to a higher level of performance.

In Figure 4, we presented several challenges, practices, and outcomes that can impact the organization and influence the responses of individual members. Additionally, top management seeks to apply the concept of dynamic capabilities to enhance effectiveness, viewing it as a stable and learned pattern of cooperative activity through which the organization systematically generates and modifies routines (Zollo, 2002). Our fourth hypothesis supports this perspective, suggesting that identifying scenarios that lead to positive outcomes, such as accepting contributions, increasing motivation, and linking wages to performance, can help achieve these goals.

Correlating our data with the concept of dynamic capabilities method, we gained insights into the challenges within the organization. It became apparent during our interactions with members that certain topics need to be addressed to enhance effectiveness and bridge theory and practice. Specifically, the communication breakdown between hierarchy levels can result in delays or incomplete information, leading to misinformation or poor decision-making. To address this gap, top management could consider implementing an online message board or a similar tool to facilitate direct access and information flow among internal stakeholders. This would provide an opportunity to review strategies, implement effective tools, and align organizational strategy with personal value to improve action plans and time-saving measures.

7. Theoretical and Practical Implications

On a practical level, our results provide valuable insights and emphasize the importance of adopting a proactive attitude and being able to change quickly while maintaining focus and competitiveness. Since the onset of the COVID pandemic, managers have recognized the need for improvement of stakeholders' relationships, the creation of new instruments, and design of new models to develop strategies that can effectively address the current context or aspects of past situations. These factors align with the concept of dynamic capabilities (Teece, 1997), which highlights the ongoing need to utilize dynamic resources to organize and manage processes to achieve sustainability. In addition, our research holds theoretical implications as it involves longitudinal studies to examine various management variations and explore the bridge between top management and the remaining levels of management.

8. Limitations and Future Research

This study has identified certain limitations that need to be acknowledged and addressed. Firstly, it is important to recognize that generalizations or interferences about the culture and methodologies of other organization's should be made cautiously, as each organization operates within its unique context. Secondly, during the interview process, some representatives of the CEOs were hesitant to answer certain questions, either to safeguard leader's position or to avoid providing inaccurate information.

In terms of future search, it is crucial to explore how top management deals with various situations and how strategic planning (SP) is practiced as a key driver of competitiveness. Several subjects warrant attention in the SP agenda for future adaptations. These include examining the ever-changing landscape of environmental sustainability and determining the significant measures (whether realistic or not) that organizations need to adopt and implement. Retaining employees is another important area that requires investigation, focusing on understanding the actions that both employees and employers can take to retain valued workers and assessing the impact of long-term organizational tenure on productivity. Lastly, it would be interesting to explore the potential contributions or limitations imposed by the government authorities on organizations' SP efforts and the benefits that can arise from such collaborations.

Abbreviations

SP, strategic planning; DC, dynamic capabilities; CA, competitive advantage; BA, bibliometric analysis; TP, top management; PRISMA, Preferred Reporting Items for Systematic Reviews and Meta-Analyses.

Informed Consent Statement

Informed consent was obtained from all subjects involved in the study.

Data availability statement

Not applicable.

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Conflict of Interest

The authors declare no conflict of interest.

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Paper contributions to our research agenda

Continuing our research on strategic planning, we could retrieve from our conclusions that the context of strategic planning could be affected by different factors and that those could lead organizations to be less sustainable and competitive. Although several prepositions were found (first study), it becomes clear that if we want to make changes it is necessary to first address the vital role of top management in the organization. This position is followed by several responsibilities and tasks that challenge the organizational growth and its stakeholders. Noticing this discrepancy, we could understand that still exists a considerable gap exists between top management and the remaining levels of management, which leads us to the second study of our research *“Bridging hierarchy levels for strategic planning: A Top Management perspective.”* The second study focuses mainly on exploring the constraints faced by top management that hinder strategic planning. Our results show that if employees have a proficient attitude regarding their organization, top management can work with them and let them participate in strategic planning, as they can be seen as an added value. The positive relations between the levels can be a factor that helps all to work towards the objectives, creating more opportunities for all involved. Other factors to consider are the seven perspectives that enhance planning leading to another level. Lastly, identifying scenarios from levels of management resulted in several improved outcomes.

Through dynamic capabilities theory, it is necessary to use/have technology that helps workers receive real-time information avoiding misinformation and impaired decision-making

Third chapter: Management Challenges

Qualitative methodology

Overcoming Remote Leadership Challenges: Lessons Learned from COVID-19

Proceedings at the University Forum for Human Resource Development Annual Conference 2022

Gandrita, D. M., Gandrita, A., & Rosado, D. P. (2022). Overcoming remote work leadership challenges: Lessons Learned from COVID – 19. *Journal of Business and Management Studies*, 4(4), 170-183. <https://doi.org/10.32996/jbms.2022.4.4.27>

Associated question:

How did team leaders adapt to a remote-work setting during the COVID-19 pandemic?

Highlights

- Adaptation to remote work;
- Tools to work remotely;
- Three dimensions that managers need to work.

Overcoming Remote Leadership Challenges: Lessons Learned from COVID-19

Abstract

The purpose of this study is to determine how leaders are overcoming remote work and team management's challenges while navigating the pandemic context that we are now facing. The relevance of this research is based on the approach to leadership theory, articulating them with the remote work and teams' management theories. To formulate the research problem, we considered two analytical dimensions, remote leadership and the competencies anchored, which helps to understand how nowadays leaders adapt to remote-work throughout the COVID-19 pandemic. A qualitative method was applied, and interviews by questionnaire were conducted to obtain 40 responses. As teams suddenly were pushed into remote work settings, valuable opportunities have arisen to learn more about: (1) which are the most used and intuitive digital tools; (2) which are the main challenges faced by leaders; (3) what do their teams expect from them when facing a crisis. The results show that remote leadership is crucial while moving forward to Society 5.0 as technology becomes more and more present in our lives (Fukuda, 2020), the existence of three dimensions that need work while promoting work-life balance and developing the right soft skills to help teams. The main goal of this study is centered on the research of relevant leadership competencies, practices, and techniques that can contribute to overcoming the challenges that may arise in remote teams' settings and contribute to the body of knowledge on the subject of COVID-19.

Keywords: Leadership; team management; remote work; COVID-19; human resources management.

JEL Code: *M5, M100, M150.*

1. Introduction

The COVID-19 pandemic has spread around the world, causing socio-economic responses, not only a health crisis, but also influencing economic activities, life in society, and several changes in the work culture of organizations (Chen, 2021). Has the world changed with the outbreak,

businesses leaders begin to take action and initiative in managing the challenges presented by the pandemic crisis (Mather, 2020).

Although there is not a particular timeframe for this crisis to finish, the role of organizational leaders and the impact of every decision they make is magnified. Despite the fact that the level of responsibility sometimes can be overwhelming, managers have the critical task of finding solutions to this crisis while also considering the image, the financial stability of the organization, as well as the welfare and morale of employees (Wooten & James, 2008). With the unfolding events, it is also an opportunity for organizations provide flexibility and create conditions to guarantee work-life balance policies not affecting employee's performance (Latha, 2020).

Harris (2020) considers that it is necessary a (re)education of the process revealing which leaders found themselves in arms with a situation which needs to safeguard employees' position and migrate to a new way of working, always envisioning the continuity of their plans. In that sense, managers begin to make the use of technologies to work, communicate, and offer new control possibilities to ensure the continuity of operations (Delfino, 2021). As a result, and in response to these daily uncertainties, many organizations asked their employees to start work remotely.

Remote work, also known as telecommuting or teleworking, means that a part or even a whole work is done by an individual while working at a different location without the person directly paying attention and/or supervising (Van Zoonen, 2021). This practical solution comes with advantages to the worker like having a greater work autonomy, more flexible hours, reducing commuting, and better work life balance. Kathleen (2021) however, underlines some disadvantages identified as social isolation, distractions, and family work conflict (Galanti, 2021). To businesses these pros and cons are converted into challenges that leaders need to keep in mind and, at the same time overcome.

COVID-19 also provided an opportunity to accept a huge natural experiment in this way of work. This large-scale digital transformation (e.g., Carnevale & Hatak, 2020; Carroll & Conboy, 2020; Fletcher & Griffiths, 2020; Venkatesh, 2020), is testing how management can be practiced, and creating new working applications for both team leaders and team members (Chamakiotis, 2021).

Giving the nature of the crisis and the need to deepen our knowledge (James et al., 2011) on how to overcome remote leadership during such challenging times. In this study the aim is to

understand how team leaders adapted to a remote-work setting during the COVID-19 pandemic and understand what lessons they have learned during these troubled times.

This article begins by presenting the theoretical framework which presents the concepts of leadership, teamwork, SARS-CoV-2, social distancing, and human resources management. The methodology is supported by a bibliometric analysis which helps to understand the steps made to acquire the papers regarding the subject of study. This is followed by the presentation and analysis of the results, their interpretation, comparison, and discussion helping to answer the central question. Finally, we reflect on the conclusions and provide a set of practical implications designed to guide leaders, help team members, provide a conductor wire to human resources management, and give a contribution to other scholars regarding the theme in the research studies.

2. Theoretical Framework

2.1. Leadership and Teamwork

Leadership is generally described as an interpersonal process in which a leader influences his followers (Dansereau, 2013). This concept is usually linked to the guidance of an organization throughout its phases and the insurance of its survival (Probert, 2011). Some authors like Waldman (2011), Bauman (2013), and Caufield (2021) stated that leadership, in its number of ramifications continues to focus largely on an internal, one-on-one relationship between leaders and followers.

It is also considered an art that depends on a more interpretative and inquiry process to decide how to act in a determined situation. Leaders must show a higher degree of commitment and elevate the status of moral empowering and inspire in a humble, responsible, and supportive manner to inspire others to achieve a set of goals as planned.

Leadership can be divided into two categories – First, the Universal theory presents the assumptions that a leader has innate characteristics, a set of congenital and subsequently acquired attributes, and that the effectiveness depends on their behavior. The second is the Contingency theory that assumes that there is no optimal leadership style and different situations/circumstances require different leadership styles (Uslu, 2019).

These theories should not be confused with other organizational-level phenomena despite influencing other processes centered around other individual actors. Thus, a broader and more contemporary perspective shows that the depiction of leadership as a method of influence occurs within organizations in which the leader is only considered an integral part of the chessboard (Waldman, 2011).

As organizations worldwide continue to grow and evolve to a more knowledge-based, more virtually, more technologically sophisticated, and with more networks the concept of leadership in teamwork also expanded in many significant ways (Chin, 2015). Contemporary organizations have started to grow their reliance on teams, surging a high interest in a more comprehensive perspective on the convergence of leadership and teamwork (Dasmit et al., 2013). Teamwork is inserted within team performance and is considered a set of interrelated attitudes, cognitions, behaviors, and attitudes contributing to the dynamic process of implementation (Salas, 2008).

As a concept team is considered a group of people who work together or collectively to achieve the same purpose and goals providing outstanding service quality (Sanyal, 2018). Katzenbach and Smith (1994), in their book *The Wisdom of Team*, also add that team performance is about thrust, in their view, performance and teams are inextricably connected with the belief that there is confusion about a team and slight confusion over what helps to make teams perform well.

Mark et al. (2001) present the concept of teamwork, describing how they are doing it with each other, referring to the scope of independent and interactive behavioral processes among team members that convert team inputs (e.g., member characteristics, organizational team member function) into outcomes (team member satisfaction, team performance).

Teamwork can enable team members to have a higher level of ability, emotional security, and self-confidence to positively plan and make decisions with others. The author also adds that the absence of strategies and teamwork can lead to occupational failure, low morale, disappointment, and poor, productivity threatening the organization's entity (Ibid, 2001). With recent pandemic events into consideration, Khattak (2020) characterized teamwork as a procedure of changing a group of people with several interests, expertise, and foundations into a coordinated and productive work unit.

This component (teamwork) means that employees work collectively to gain a specific vision and complete work in a better way and accomplish company goals. In conclusion, effective

collaboration supplies significant benefits to organizations facilitating the work of all the stakeholders involved. To ensure that teams are concerned with the organizational goals is necessary to have strong leadership that will contribute to the solution of the daily problems and ensure the continuity of the operations.

2.2. SARS-CoV-2

The prevention, promotion of health, and the spirit of solidarity had never been so important in people's lives as during the SARS-CoV-2 pandemic. Coronaviruses are minute in size (65-125 nm in diameter), containing a single-stranded RNA as a nucleic material, with a size ranging from 26 to 32 kb in length (Khan, 2020). The disease name was subsequently approved as COVID-19 by the WHO (World Health Organization). Meanwhile, 2019-nCov was renamed SARS-CoV-2 by the worldwide committee on taxonomy of viruses. On February 24th of 2020, more than 80,000 confirmed cases including, more than 2,700 deaths, were reported worldwide, affecting at least 37 countries (Yuen, 2020).

COVID-19 is usually spread either through physical contact with an individual (person-to-person), droplets, or less possibly from oral transmission. In addition, researchers concluded that it is a highly transmissible virus in which it is needed to understand its epidemiology, clinical features, transmission, diagnosis, treatment, and prevention to gain insight into the disease (Baloch, 2020).

The onset of COVID-19 symptoms to possible death is from 6 to 41 days with an average of 14 days. This period is dependent on the patient's age and the status of the person's immune system, shorter among older patients when compared with those under the age of 70 years. The most common symptoms at the beginning of COVID-19 illness are fatigue, cough, and fever. However, other symptoms may arise, such as "*sputum production, headache, hemoptysis, diarrhea, lymphopenia, and dyspnea*" (Smith, 2020: 4).

2.3. Social Distancing and Remote Work

One of the measures to protect and prevent the spread of the disease, according to Piovani (2020) study was the importance of social distancing to ensure protection as long as the restrictions become higher. Although there are some differences between the author and the world health organization in managing the pandemic, they have reached a common goal regarding their

effectiveness in reducing the rate of mortality and contagion, along with other proposals to confront and prevent COVID-19 (Gualda, 2021).

Considered one option to control the pandemic the use of a social distancing policy, defined by Chen (2021) as the measure administrated to reduce interactions among people. This will contribute to limiting the mobility and control of the transmission rate, which will help reduce the infection rate and attenuate the costs of market instability. According to Silveira (2020), there are different types of measurement inserted in social distancing passing through the closure of schools and universities, social distancing encouraged, mass gathering banned, and total lockdown decreed.

Although the recommendations about social distancing are relatively new, it is tough to tell what the long-term consequences will be. But it is known that it can lead to different kinds of health problems like anxiety, depression, physical, and psychological distress (Lwin, 2020). On the other hand, social distancing can lead to lower stress levels mitigated by technology and digitalization which people still talk to each other through different applications such as Skype, Zoom, and Facetime (Eriksson, 2020).

It's a myriad of choices regarding online connectedness. As time passes, researchers have turned their attention to innovative working models accomplished outside spatial and temporal organizational borders through the support of communication and information technologies. One of the most used work settings nowadays is remote work, it is the usage of technologies that determines the employees' ability to do their job remotely (Pianese, 2016).

With the COVID-19 pandemic, several workers realized that it is possible to perform the same functions as they did in the office from home, this can be done without experiencing loss of productivity, in some cases it was registered an increase of productivity. According to the author, this brings remote working within the admissible costs clause for many jobs, thus making better access to execute daily work tasks (Corvino, 2021).

Regarding the implementation stage, managers have a decisive role in re-designing processes and managing vital issues as employee's loss of creativity. The authors also stress the key role of suitable technological tools and governance mechanisms for remote work effectiveness (Campell and MacDonald, 2007), (Errichiello, 2016). However, its focus should not be solely on the work tasks itself but take care of the well-being of its workers. It becomes necessary to continuously check on their workers' performance during the difficult period in COVID-19, also workers' find

themselves in a position where they must demonstrate their productivity working from home and at the same time have the ability to adjust to pressures and requirements (Walter, 2020).

Although literature reviews remote work as a basis, it is essential to refer to telecommuting, also known as telework, allowing employees to perform their job duties remotely, far from their central workplace, following work agreements. It becomes a choice to workers that attempt to temporarily craft a new work environment to increase personal work creativity and productivity (McCloskey et al., 2003).

Telecommuting has advantages that can be observable and practical to workers regarding flexible schedules, cost-saving, environmental impact, and a better work environment. Some challenges were discovered regarding the changes in adapting to work processes, the negotiation (Carnevale, 2020; Fisher et al., 2020) between work and family, leading to a destabilized work-life balance (Caringal-Go, 2021).

2.4.Human Resource Management

The literature on human resource management often highlights the importance of aligning with the organizations' goals, providing the conditions for employees to effectively contribute to greater results (Costa, 2019). Inserted in its policies and practices, authors like Oliveira (2017), Iqbal (2018), and Demo (2019) talk about the importance of human resources management in organizational strategy, the integrated approaches, and how to develop new ways for the well-being of people in the organization.

The speed at which COVID-19 spread out took several governments by surprise with the negative outcome that most of them couldn't respond or mobilize the capacity to give answers to the problem faced. Consequently, many countries issued a mandatory "*stay-at-home*", banning all but essential economic and social activity outside the household (Butterick, 2021: 4). The impact in the workplace results in social distancing, remote work, increased unemployment, and short time working schemes or furloughed with state support (ibid, 2021).

Human resources management needed to (re)organize its activities and founding itself with an enormous task which can lead to challenges and opportunities, in that sense, one of the first actions was the gathering of relevant information that will contribute them to go through the crisis efficiently and effectively, sustain the company business, and be able to support their employees (Hamouche, 2021).

First, of the human resources management assignments during the compulsory lockdown is to overcome and avoid insecurity of all labor mass creating forms of communication throughout the connection of remote work, and second, although organizations are passing a difficult situation it becomes visible that the key to success is to win the trust and confidence of all retail employees by using the appropriate communication tools (Mohammed, 2020).

Although these changes are a relevant factor to surpass and grow these pandemic times, human resources management needs to reinforce its commitment to the organization resulting in a higher loyalty from the employees and a higher return for the organization (Santos, 2015). Adding to the ability of human resources management to change and adapt to these undesirable conditions, remote work brings several digital instruments that helped implement new forms of labor, assisting workers operate outside their organizations and the reconfiguration of work performance (Donnelly, 2020).

3. Methodology

3.1. Literature Review

This paper used a qualitative approach based on interviews by questionnaires. The method used was the inductive research approach which moves from specific research findings. The data collection was carried out bearing in mind the purpose of investigating how leaders is overcoming remote work and team management's challenges while navigating the pandemic context that we are now facing.

A nonprobability sampling, more specific, purposive sampling and the members were selected according to the purpose of the study. Using a bibliometric methodology will help understand the steps made to gather data and the relevance of the study.

3.2. Sample Characterization

Our questionnaire sample covered 40 individuals, 67% are from Portugal, and the remaining 33% are from other European countries. The current job level with the higher percentage is people's manager, director, or above with 67% and at an individual level 33%. The sectors that weigh the most are Business and Professional with 21%, and other sectors have 19%.

Regarding the size of the organization, fifteen-five individuals have 1-500 employees with 38%, four individuals have 501-1000 employees with 10%, one individual have 1.001-5.000

employees with 3%, ten individuals have 5.001-10.000 employees with 26%, and nine individuals have more than 10.001 employees with 23%.

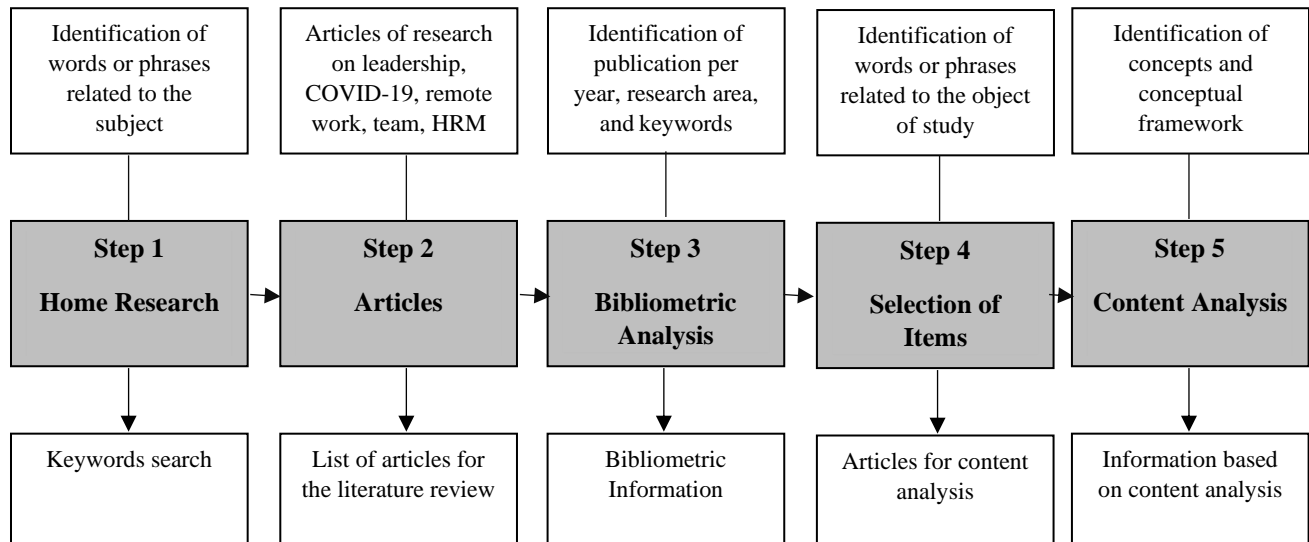
The most significant percentage regarding gender were answered by 24 men representing 60% and 16 women constituting 40% of the results. For last, the ages between 16-24 years old have one answer registering 3%. Ages between 25-35 years old have seven answers with 18%, between 36-45 years old have written sixteen responses with a percentage of 40%. Lastly, more than 46 years old have sixteen answers with 40%. Also, the participants were recruited based on their experience and expertise.

3.3.Data Analysis Process

The literature review was selected throughout the reading of abstracts with the keywords similar to this study, removing all the articles non-related to the subject. These words were added and selected in the *Web of Science* (WoS) database providing a list of high-quality peer-review articles used in the theoretical framework.

To begin our research, the keywords used in the *Web of Science* to work on the literature are “Leadership” OR “Teamwork” AND “COVID 19” OR “Social Distancing” OR “Remote work” AND “Human Resources Management”, OR “Team Management” giving a total of 255.568 articles published. Refining the results by the categories of management, business, communications, and telecommunications gave 40.029 results.

Figure 1: Literature review process



Source: Own elaboration

While refining for publication years, considering 2019 to 2022, the total found was 11.986 articles. Afterward, the search was restrained by document types to articles giving 10.370 results. Filtered by publication titles, we could determine four journals relevant for this study refining a total of 2.416 articles.

Table1: Journals and Number of articles

Journals	No of articles
<i>Asia Pacific Business Review</i>	27
<i>Asia Pacific Journal of Management</i>	37
<i>Leadership Organization Development</i>	217
<i>Leadership Quarterly</i>	110
<i>Leadership</i>	131
<i>Journal of Leadership Studies</i>	247
<i>Nonprofit Leadership Management</i>	116
<i>Journal of Business Research</i>	175
<i>Journal of Leadership Organizational Studies</i>	103
<i>International Journal of Organizational Leadership</i>	65
<i>International Journal of Human Resource Management Organization</i>	102
<i>Organization</i>	22
<i>Journal of Management Development</i>	69
<i>Human Relations</i>	74
<i>Management Decision</i>	71
<i>Academy of Management Journal</i>	41
<i>Management Research Review</i>	78
<i>Human Resource Management</i>	36
<i>Journal of Management</i>	52
<i>Journal of Management Organization</i>	53
<i>Human Resource Development International</i>	42

<i>European Management Journal</i>	34
<i>Business Horizons</i>	33
<i>Human Resource Development Quarterly</i>	40
<i>Strategic Management Journal</i>	25
<i>Team Performance</i>	25
<i>Employee Relations</i>	42
<i>Human Resource Management Review</i>	26
<i>Journal of Change Management</i>	35
<i>Harvard Business Review</i>	21
<i>British Journal of Management</i>	22
<i>Journal of Management Studies</i>	34
<i>Human Resource Management Journal</i>	26
<i>Academy of Management Review</i>	17
<i>Business Strategy and the Environment</i>	32
<i>Pacific Business Review</i>	23
<i>International Journal of Business Society</i>	13
<i>Journal of Small Businesses and Enterprise Development</i>	15
<i>Journal of Knowledge Management</i>	78
<i>California Management Review</i>	15
<i>European Business Review</i>	18
<i>South Asian Journal of Business Studies</i>	15
<i>Management Science</i>	21
<i>Journal of Strategy and Management</i>	21
<i>International Entrepreneurship and Management Journal</i>	14
<hr/>	
45 Journals	2.416 results
<hr/>	

Source: Own elaboration

After applying data cleaning filters, we exclude the non-relevant articles to maintain those that support our argument, construction of the literature review, discussion of results, and conclusion. With the application of this filter, and addition of the exclusion criteria, we've reached to a final sample of 193 papers.

3.4. Inclusion criteria

To carry this study, we have considered peer-reviewed journals/articles as a thrust source of knowledge, maintaining out of scope thesis, blogs, book chapters, and editorial notes were excluded from this study. The relevant publications and work related to this work correspond to the initial *Web of Science* criteria regarding leadership, COVID-19, remote work, human resources management, and social distancing. Also, the primary language used is English.

3.5. Exclusion criteria

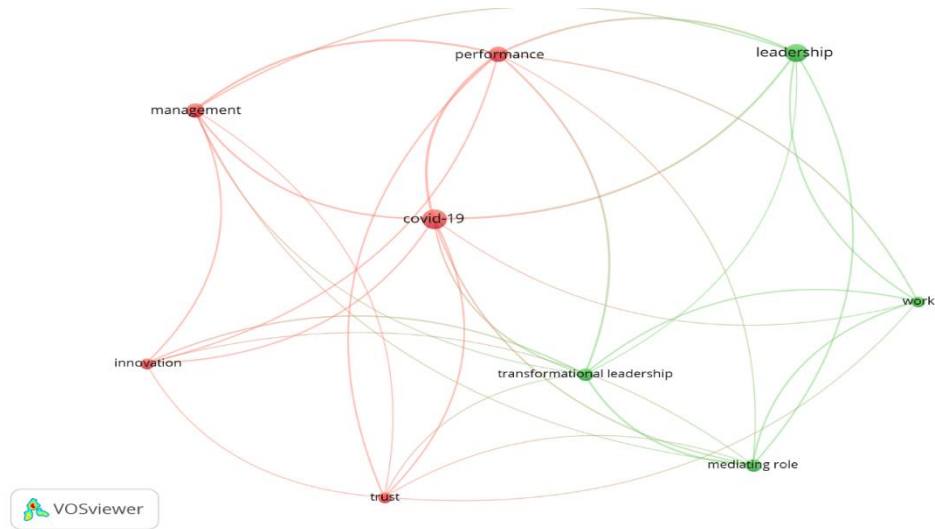
Research publications were exposed according to the inclusion criteria. However, in the exclusion criteria we have ruled out articles that do not contribute directly to this study or our research question. More specifically, we have ruled out:

- *Ex1* Articles focused on business models.
- *Ex2* Articles about medical or software development process.
- Articles with related subjects like military, ethics, philosophy, medicine, or education.
- Articles focus on processing modeling guidelines

3.6. Keywords/ Cartographic Analysis

A keyword analysis (Fig. 2) was conducted to conceptualize the dynamics and evolution of bibliometric studies in leadership (Waltman, 2010). To have a significant analysis, all the data was inserted in VOSViewer through an RSI file with the following parameters: (1) co-occurrence was added to the type of analysis, a (2) full counting, and (3) keywords as a unit of analysis to elaborate the network. Filtered a minimum threshold of 5 occurrences, 337 keywords which 9 meet the threshold giving the following keywords as a result: Performance (11), COVID-19 (19), Leadership (14), transformational leadership (7), management (9), mediating role (7), innovation (5), thrust (5), and work (5).

Figure 2: Keywords analysis



Source: VosViewer software 1.6.67

3.7. Metadata Analysis

Table 3 shows the six articles related to the chosen keywords with the number of citations and references. The first article is connected to COVID-19, a subject that has been dominated and created controversy all over the world and a theme of interest in all scientific areas. In 2021, the construct teamwork had more relevance due to the context that we face, the high number of citations has increased since COVID-19 and gained more importance in literature. Due to the pandemic context, the world team and team performance gained momentum and significant importance in the organizational community, in that sense, the number of citations reveals that it is a meaningful subject and needs to be constantly deepened to understand the present and contribute to the future.

Although the number of citations in leadership is few, this construct has a significant role in how organizations behave, what it is possible to do with their teams and human resources management relations. Lastly, according to Gandrita and Rosado (2019) one of the essential areas in organizations is human resources management which is the key element that provides continuous support to the remaining areas to grow, develop, and be focus of study in all scientific areas.

Table 2: Articles over 40 citations

Article Title	Author	Journal title	Year of publication, (vol, no.: pp)	Total citations under WoS	Ref.
COVID-19 infection: Origin Transmission, and Characteristics of Human Coronaviruses	Shereen, M., Khan, S 2020	<i>Journal of Advanced Research.</i>	2020, 24, pp. 91-98	1.100	84
On Teams, Teamwork, and Team Performance: Discoveries and Developments.	Salas, E., Cooke, N.	<i>The Journal of Human Factors and Ergonomics Society</i>	2008, 50(3), pp. 540-547	715	63
Leadership and the Three Faces of Integrity.	Bauman, C.	<i>The Leadership Quarterly</i>	2013, 24(3), pp. 414-426	57	57
Leadership Development: Crisis, Opportunities, and the Leadership Concept.	Probert, J., James, T.	<i>Sage Journals</i>	2011, 7(2), pp. 137-150	32	58
What Makes Leadership, Leadership? Using Self-Expansion Theory to Integrate Traditional and Contemporary Approaches.	Dansereau, F., Seitz, R., Yammarino, J.	<i>The Leadership Quarterly</i>	2013, 24(6), pp.798-821	43	135
Work engagement: Individual and Situational Antecedents and its Relationship with turnover intention	Oliveira, L., Rocha, J.	<i>Revista Brasileira de Gestão de Negócios</i>	2017, 19(65), pp. 415-431	9	46

4. Framework Analysis

4.1.COVID-19 Impact on Team’s Dynamics and Operations

According to the literature review, COVID-19 is a transmissible virus in which all ages can contract the illness because it can be transferred through large droplets resulting from sneezing and coughing of a symptomatic or asymptomatic individual (Smith, 2020). This virus has affected teamwork and team performance regarding their interrelated attitudes, cognitions, behaviors, and attitudes contributing to the dynamic process of performance (Sanyal, 2018).

A team is defined as a group of individuals who work interdependently to achieve the same goals providing the best outcome possible, however with recent events teamwork needs to specify the vision and to work differently to accomplish company goals (Khattak, 2020). In the questionnaires, it was agreed to the idea that COVID-19 had a big impact on the team’s dynamics and on how teams operate, as it impacted basic communication processes and work procedures as well as representing a constraint to teamwork due to the lack of physical proximity and other social interactions.

Table 3: Main challenges for teams in a remote work setting while navigating the pandemic context

Main Challenges	Teams and Leader’s Perspective
Communication	[1] “Bad communication” or “ <i>No communication</i> ” is often the main cause of chaos and heartburn in a team [2] Leaders struggle to keep up with every team member and to provide continuous feedback [3] Difficulties in sharing info and get the desired result when explaining something remotely
Disengagement	[1] Keeping people aligned, motivated, and engaged is a true challenge

	[2] Less productivity [3] Lack of social interaction
Work-life balance	[1] It is hard to disconnect at the end of the workday [2] Working from home often results in a fusion of work and private life [3] Battling a new set of “distractions” (children, pets, etc.)

Source: Own elaboration

While moving into a full remote-work environment, our participants identified the easiest and hardest thing to adapt to both at an individual and collective, at an individual level the hardest thing was focusing on tasks and the easiest one was time management, at a collective level the hardest thing was communication, and the easiest thing was work planning.

4.2. People and Organizations Embrace Remote-Work as the New Normal

In the last decade researchers paid attention to innovative working models, one of the most used labor settings is remote work, determined as the ability of employees to do their job remotely (Pianese, 2016). This tool (remote work) helps several workers to realized their tasks with greater autonomy, more flexible hours, reducing of commuting, and have better work life balance. Kathleen (2021). In this format there is the possibility to function in the office from home without experiencing the loss of productivity, reducing costs and making better access to execute daily work tasks (Corvino, 2021).

In the questionnaires that were developed some participants argue that people were ready to embrace remote work as the new normal, most of them express that only a few were, in fact, ready or not ready at all. Although was necessary the use of social distancing, considered a measure that can be taken to limit the spread of infectious disease between people (Kelso et al., 2009), throughout the questionnaires, it was possible to understand that some of those individual-level contributors are ready while others believe that they are not ready to work remotely.

Table 4: The top 3 digital tools that revealed to be the most useful and intuitive while remote working

Digital tools for remote work	Importance and practical application
Zoom	[1] Turned out to be a cornerstone [2] Is easy to set up, use, and manage [3] Connects via desktop clients, browsers, conference rooms & mobile devices [4] Single platform for meetings, phone, webinars & chat [5] Allows to stay connected with the whole team
MS Teams	[1] Fosters incredibly targeted communication among teams [2] Meeting and scheduling tools allow syncing calendars. [3] Is a Digital Transformation Kickstarter [4] Allows real-time document collaboration. [5] It can be accessed anywhere, anytime, on any device
Whatsapp	[1] A very familiar tool, used on a daily basis by most people [2] Speed and immediacy of messaging allows discussing time-sensitive things [3] Excellent for engaging with and managing remote teams [4] Ease of communication [5] Enables creativity

Source: Own elaboration

Around 98% of our participants consider using some digital tools whenever they get back to the office, as these tools are useful to keep teams synchronized, appear to be more practical, and allow them to keep contact with everyone, even those who work in other cities/countries.

4.3. Manage a Remote and/or a Hybrid Team

Leadership is generally described as an interpersonal process in which a leader influences his followers. He encourages and empowers others in a responsible, humble, and supportive manner to inspire others to follow him (Dansereau, 2013). Has organizations become more

technological evolved it is necessary that leaders know how to manage their teams, and subsequently distribute the work more effectively.

To this task be achieved in a practical and efficient manner, organizations must start rely on teams and see from a more comprehensive perspective on the convergence of leadership and teamwork (Daspit et al., 2013). Although the advantages attached to remote-work are observable and practical to the majority of businesses, nearly 100% of participants team leaders stated that they did not feel like they were prepared to manage a remote and/or a hybrid team.

Holt (1995) considers that organizations entered our lives in different ways, by people consuming their products, transforming buildings into offices, read about in newspapers, and absorb their advertisements. These constant challenges contribute to the ability of organizations to test their abilities and be successful. With this in consideration, its necessary to develop effective human resources management practices and policies that will enable them to motivate, and retain competent employees, attract talent that will contribute to the organizational objectives.

According to the data collected, only 15% of the organizations offered any specialized training, 85% of our sample stated that they felt like they had to figure out what to do and how to do it on their own to adapt themselves and their teams to the new remote work reality.

Table 5: What teams expect the most from their leaders when facing a crisis?

Dimension	Teams and Leaders expectations
Daily Tasks	[1] To make timely decisions [2] To provide the right tools, training, and environment [3] To keep people focus [4] To pursue goals [5] To give attention, constant interaction, and support [6] To build team spirit
Soft Skills	[1] Resilience [2] Courage [3] Collaboration

	[4] Communication [5] Flexibility [6] Leadership [7] Emotional intelligence
Behavior	[1] To remain calm under pressure [2] To reinsure others [3] To think positive [4] To never give up [5] To spread hope [6] To be fully dedicated [7] To give recognition to others [8] To promote solidarity

Source: Own elaboration

5. Discussion of the Findings and Implications

With the constant changes throughout the pandemic crisis, organizations need to use their tools to adapt and overcome the continuous challenges they encounter every day. Leaders must show a higher degree of commitment, elevating and inspiring others (Uslu, 2019) so that enables team members to have a higher level of ability, emotional security, and self-confidence to positively plan and make decisions with others (Mark et al., 2001).

One of COVID-19 measures of protection was the social distancing policy administrated to reduce interactions among people (Chen, 2021) and as a response from organizations to face everyday challenges remote-work was used as a working tool for their daily tasks. With these changes in working methods is becomes necessary that employees have flexible schedules, cost-saving, environmental impact, a better work environment, and a better work-life balance (Carnevale, 2020); (Fisher et al., 2020).

In our research, we have discovered that managers become remote leaders who had to overcome challenges regarding how they communicate to their teams and how they influence their followers (Dansereau, 2013). There is a strong necessity to engage with workers following the

organization's plan and objectives, and although people are working at home, its necessary to find a balance.

To find a resolution to the gaps presented in teams and the leader's perspective, it is necessary to align the organizational objectives with human resources management to provide the options conditions for employees to effectively contribute to greater results (Costa, 2019).

This new context makes leaders continue to reevaluate new ways to team's work maintaining social distancing as COVID-19 becomes an intrinsic part of the new normal. The contribution to social distancing is considered a measure that can limit the spread of infectious disease between people (Kelso et al., 2009).

Tools like Zoom, MS Teams, and WhatsApp were embraced by some of the participants arguing that people are ready to work remotely to achieve the same purpose and goals providing outstanding service quality (Sanyal, 2018). However, looking at the respondents at an individual – level contributors it becomes clear that some believe in remote work while others believe that they are not ready to work remotely

As organizations continue to be challenged in providing services and products to their clients, the human resources management has to create new policies and practices that will enable workers to be motivated, search for new talent with new ideas, and retain the competent workers who will continuously contribute for the growth of the organization. Due to these changes in leaders' approach, the structural and measurement model (Chansatiporn, 2019) need to be altered to give a correct assessment of the reality by adding, according to the assessments in table 5, the daily tasks which involves what leaders need and what they expect from its followers.

The renovation of soft skills is needed to surpass the difficulties regarding the pandemic, and the behavior component which will make the team be more effective converting team inputs (e.g., member characteristics, organizational team member function) into outcomes (team member satisfaction, team performance) (Mark et al., 2001)

Given these considerations, we obtain in our theoretical implications a more profound understanding of how remote leadership works and what managers should be aware of working and being part of a team, and not only leading the team. Regarding the practical implications, the knowledge of what tools are available for the daily work of managers, the adjustment of skills to working towards the goals in the organization, and the holistic engagement of human resources management, managers, and employees lead to organizational excellence.

6. Conclusions

This paper analyses how team leaders adapt to a remote work setting during the COVID-19 pandemic. The topic was analyzed through the triangulation of data and literature review in which we could understand that with this pandemic, in an almost mandatory way, many businesses were forced to close, leading to an unprecedented disruption of commerce in most industries (Donthu, 2020).

Leaders identified the problem and made several changes to continue operations and acquire a competitive advantage in the process. The adaptation to remote work was made through the use of digital tools like (1) Zoom, which allows teams to stay connected during the conference call or work itself and can be connected via desktop, clients, browsers, conference rooms, and webinars, or video chat. (2) MS Teams permit real-time document collaboration, be accessed anywhere, anytime, on any advice. (3) Whatsapp is becoming one of the best communication tools for engaging with and managing remote teams.

The challenges attached to the present context are considered a difficulty to remote technology: the lack of support of communication, disengagement, and work-life balance. In our data, we presented the leader's perspective which, in terms of communication, encountered the difficulty of sharing and got the desired result when explaining something to someone remotely or keeping up with every team member and providing continuous feedback.

The disengagement of employees results in less productivity and a lack of social interaction. Lastly, in work-life balance, leaders continue to battle with a new set of “*distractions*”, the fusion of work and private life, and the difficulty in disconnect at the end of the workday.

Regarding expectations, we have found three dimensions that need to be worked on, (1) the Daily Tasks, which are all about providing the right tools, training, and work environment to people as well as focusing on company goals and building team spirit. Leaders need to develop (2) soft skills such as resilience, courage, flexibility, communication, and emotional intelligence in a remote work context. Regarding (3) behavior, teams expect their leaders to remain calm under pressure, reassure others, think positively, and promote solidarity.

Bearing this in mind, remote leadership opens new doors to new hirings, the possibility of attribute tasks to people with disabilities, the redoing of leadership and remote work models including the data from our research, and the pursuit of better communication which pointed out has the most prominent flaw due to the arrival of remote work.

Leaders worldwide seek to test and improve the use of technological tools available to keep up and motivate their team, having two huge concerns: Ensure work continuity, fulfill the goals and objectives, and maintain the team united and motivated.

7. Future Research

This research focused on overcoming leadership challenges during tricky times. We developed our theory and noticed that several subjects need to be both in, targeting an intense study that helps understanding how leaders can operate during pandemic times and how organizations can benefit from these scientific contributions.

With this in mind, some topics need attention and future research, understanding how human resources management can help team leaders engage with their teams during remote, the learning and ability to know what are the meaningful soft skills while remote-work is being made, and what best practices can be (re)design from remote-work communications.

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Paper contributions to our research agenda

The organizational scenario changed due to COVID-19 forcing managers to make several adjustments and overcome situations for which they were unprepared or require new competencies. As a contribution for this situation and to continue creating solutions to integrate into strategic planning and offer top management solutions, the following research was developed: ***Overcoming Remote Leadership Challenges: Lessons Learned from COVID-19.***

Although a proficient attitude is necessary, this unfamiliar context provides internal stakeholders with the opportunity to learn new lessons adding more value to the entire workplace. Consequently, new tools were identified that can facilitate remote work function and enhance the competitive process. The use of these digital tools (1) Zoom, (2) MS Teams, and (3) Whatsapp helps with engagement and ensures of daily operations to continue.

We also determine that were three dimensions that managers could address and incorporate to strategic planning as path to success. Firstly, it is necessary to be aware of the (1) daily tasks, which are all about providing the right tools, training, and work environment to people, as well as focusing on company goals and building team. Secondly, leaders need to develop (2) soft skills such as resilience, courage, flexibility, communication, and emotional intelligence in a remote work context. Lastly, with regards to (3) behavior, teams expect their leaders to remain calm under pressure, reassure others, think positively, and promote solidarity.

Fourth chapter: Strategic Planning Effectiveness

Quantitative methodology

Environmental sustainability for strategic planning effectiveness and organizational improvement

Gandrita, D. M., Gandrita, A., Rosado, D. P., & Carmo, M. (2023). Environmental Sustainability for strategic planning effectiveness and organizational improvement. *Sustainability*, 15(8), 6774. <https://doi.org/10.3390/su15086774>

Associated question:

*How does environmental responsibility contribute to workforce retention?
Does the incorporation of environmental guidelines into strategic planning lead to
increased workforce retention?*

Highlights:

- The implementation of environmental guidelines in Strategic Planning;
- The retention through messages and the intentions of
- managers to applied it;
- Knowledge and training to increase performance.

Environmental sustainability for strategic planning effectiveness and organizational improvement

Abstract

Organizations are continuously pushed to be more competitive with a broader strategic planning framework that deals with sustainable dilemmas and creates new demands for inclusion. This study aims to investigate the relationship between environmental responsibility and workforce retention, as well as the role of environmental responsibility in strategic planning. The findings of this research will contribute to a greater understanding of how social responsibility can improve employee retention and lead to a more efficient and effective outcome. Using a quantitative method, we surveyed $n=311$ respondents and conducted a bibliometric analysis using the Web of Science database to gather relevant information on the topic. The findings of this study will provide insights into how social responsibility can improve employee retention and enhance organizational efficiency and effectiveness. The results address the value of implementing environmental guidelines in strategic planning, the contribution of top management and pro-environmental with the intention to apply it, and the encouragement to share knowledge and best practices.

Keywords: Environmental sustainability; environmental responsibility; strategic planning; strategic planning effectiveness; workforce.

Abbreviations

ES, environmental sustainability; ER, environmental responsibility; PRISMA, Preferred Reporting Items for Systematic Reviews and Meta-Analyses; SP, strategic planning; SC, Sustainable culture; BA, bibliometric analysis.

1. Introduction

Traditionally, strategic planning has been considered one of the sources of knowledge for organizations in the business sector (Curley, 2015; Kulage et al., 2013). This systematic method

of making valid contributions to crucial decisions about the management of organizations' resources has suffered several changes over time (Broome, 2019).

According to Dyson (2005) and Broome (2017), strategic planning is defined as a set of processes that can be undertaken to develop objectives and goals over a three-to-five-year period. Additionally, SP is used to align resources, energy, and activities towards a common goal in a thoughtful, disciplined, and systematic process of exploring and understanding emerging trends and desired futures (Weston, 2022).

The characteristics that define planning are considered by managers a guide to proactively and deliberately leverage their idiosyncratic combination of resources to create an advantage over their competitors (Dibrell, 2014). As we move forward in time, the phenomenon of environmental sustainability has come to dominate conversations and has created new challenges to business models which has consequently brought a renewed vision to the planet, organizations, and society.

However, sustainability has found some resistance from a few managers that question its daily applicability in planning and to what extent may contribute to an organization's ability to create profit and continuously innovate (Titus et al., 2011; Wiltbank et al., 2006). Lahouel (2022) also calls attention to whether there is the possibility of "doing well by doing green", which is constantly debated in the literature, but no consensus has been reached to date.

On this point, the possible challenges of environmental sustainability, which require managers to understand the necessary changes to support goal achievement, generate doubt about the effectiveness of strategic planning for the company. Furthermore, Lee (2013) adds that when these adjustments occur, the organizational workforce enters into a phase of resilience, depletion, and regeneration, which are conceived of as interlinked processes, and following this, the spatial-temporal perspective, regarding what happens in planning, responding, and recovery, can be considered.

Considering this author's vision, we realized that there still exist some blurred lines in the debate about the commitment of environmental sustainability to strategic planning moving from an "either/or" to an integrative approach (Meissner, 2014) and subsequently, the necessary changes to business management reach a greater level of effectiveness in achieving continuous improvement and mature evaluation (Teixeira, 2019).

As we move forward in time, we aim to understand the relationship between environmental responsibility and the workforce as well as the role of environmental responsibility in strategic planning for more effectiveness and competitiveness.

The following paper is organized as follows. Section 2 presents the theoretical framework and the literature relevant to our research hypothesis. The research methodology is described in Section 3, in which we apply a bibliometric study, explaining all the steps used to acquire the necessary information. In Section 4, we present the collected data acquired through the quantitative method. The implications of our research findings are discussed in Section 5. The conclusion is presented by summarizing the contributions and limitations of this study in Section 6. Lastly, the study's limitations and avenues for future research can be found in Section 7.

2. Theoretical Framework and Research Hypotheses

2.1. A Sustainable Strategic Planning

Environmental sustainability has become part of global discussions in recent decades (Aucho, 2022). This phenomenon has been called to the attention of companies, which must start to pay more attention to the environmental impact of their corporate activity and accomplish sustainable development (Kim, 2022). In this sense, as one of the key aspects of business operations, managers must put in place strategies for eco-value creation to become more sustainable (Cakaya, 2013).

As we move forward in time, it becomes necessary for organizations to commit and adopt actions targeting environmental protection and improvement while achieving economic performance (Yang, 2019). Sustainability has also transformed itself into a management tool for organizational change, which can be influenced by managerial attitudes, board responsibility, stakeholder relationships, information systems, and employee responsibility (McNicholas, 2007).

Furthermore, this provides business models to focus their attention on the delivery of a “function” to their customers (Mont, 2002; Williams, 2007) by integrating services and products that can fulfill customers’ needs. However, sustainable entrepreneurs are facing severe challenges as their businesses need to merge social, environmental, and commercial logistics, which sometimes diverge from their objectives, practices, and values, resulting in a lack of application of the strategic plan (Laasch, 2018).

One of the most prominent challenges related to managerial sustainability is the retainment of workers. In organizations, there is a need for the retention of collective or individual human capital, which becomes a central concern because many valuable workers tend to leave (Ranft, 2000), which results in several adjustments in overall strategic planning. Ranft (2000) explains that some of the factors attached to employees leaving could be worthy of substantial financial incentives for staying, including the possibility of being in demand not just by the acquirer, and also the offer of greater incentives from other companies for key employees to leave.

Considering the reasons above, Pohl (2022) goes further and states that strategic planning geared towards accomplishing the proposed initiatives and objectives must be outlined, providing opportunities to pursue environmental sustainability and contributing also to the retainment of the new generation of workers. Some of these initiatives and objectives can be delineated as:

- Make partnerships with companies to provide information on carbon footprint implications and options for recycling;
- Work with several types of industries to focus on environmental product design that enhances the principles of sustainability (e.g., circular economy);
- Explore and seize opportunities to engage with organizations to support and promote environmentally sustainable digestive health care.

2.2. Overview of the Strategic Planning Process

Strategic planning has an extensive history that includes the unfolding of competing and multiple theories to explain strategic planning and its correlation with achieving management objectives (Papke-Shields et al., 2002, Shenhar, 2012; Segars et al., 1998). This systematic process entails learners executing or accomplishing a task, considering what they need to encode and how to express that content (Ellis, 2005).

According to some scholars (Grant, 1991; Rowlands, 2018; Amrollahi, 2018; Weston, 2022; Gandrita, 2022) dimension planning is defined as an alignment of the energy, resources, and activities of an organization to work towards a common goal. This can be considered a significant contribution to the reduction in uncertainty, creating a higher level of transparency in circumstances that would otherwise be unknown (Bérard, 2010).

Although we live in an era of more contemplation of the future, strategy research has increasingly become more vital to organizations, as a strong call for more decentralization and more tools, environmental awareness, and stakeholder awareness of the strategic planning process (Kargar, 1996; Segars, 1998). These developments concerning participation, effectiveness, and inclusion of sustainability in strategic planning must be integrated into the core strategy of a firm by creating shared value, which hints at the creation of simultaneous benefits for society at large and all shareholders (Porter and Kramer, 2011).

It is also necessary to mention that there are some limitations regarding the synergies and efficacy of the resources, increasing risk and uncertainty due to the constant changes in the business environment. These can be verified by the adjustments required for a strategic plan to result, which may frequently increase the inconsistencies in daily routines/activities, leading to lower coordination (Dodgson, 1993; Ohja, 2020).

Baum (2001) and Frese (2007) also point out that the effectiveness of coworker training and education support ought not only to materialize in the classroom, but also has an impact after the planning has been put into practice. This statement on the direct effect of training support on social enterprises' execution goes alongside the proclamation made by Cheah et al. (2019). In many small and young organizations, managers need to multi-tasking, disregarding the time-consuming strategic planning process, even though supportive bodies have made training programs available to them.

Besides training, the will of an organization to increase its efficiency needs to be aligned with structured strategic planning; in this sense, organizations need to look for knowledge or numerous ways to recombine their knowledge (Snihur, 2019) and for managers have more constructive and quicker feedback, as well as to disengage from the need for extensive workloads (Delias, 2021).

Finally, a part of the effectiveness of strategic planning is attributed to the retention of people working in the organization. Kennedy (2010) stresses that it is much cheaper to maintain current employees than hire new ones. This assignment was directed to both the destination and the presentation of pro-environmental messages to top management and the workforce (Hanks, 2016) to avoid a feeling of disconnection from people in day-to-day work. This could affect the lack of commitment to the proposed plans (Langley, 2014). The four relevant prior studies and their findings are displayed in Table 1.

Table 1: Prior studies on strategic planning

Author (year)	Country	Main Findings
Ohja et al. (2020)	United States	Less effectiveness in strategic planning damages companies' performance but is influenced positively by financial performance and operational capabilities level.
Baum et al., (2001) & Freese et al. (2007)	United States	The materialization of training should be put in practiced after the plan has been established, not only in the classroom.
Snihur (2019)	France	Organizations need to look for knowledge or ways to recombine their knowledge.
Langley (2014)	United States	Disconnection from day-to-day work leads to a lack of commitment.

Source: Own elaboration

2.3. Increasing Strategic Planning Effectivity

The literature on effectiveness often uses terms such as goals, purposes, aspects, aims, dimensions, factors, indicators, barriers, conditions, controls, issues, barriers, enablers, and components (Zhang, 2020; Ortolano, 1993, Pope, 2017). However, there is rarely a definition for them, and when they are defined, the concepts lack somewhat in consistency across the literature (Bond, 2022).

The terms above are constantly recognized and interpreted by managers as they move forward to achieve and establish an effective plan. In general terms, effectiveness is related to organizational strategy and the ability to generate sustainable growth in revenue in surrounding networks (Gaertner, 1983; Mass, 2005).

Although some organizations continue to address their operational needs solely, the strategic planning process needs to continue to be developed to become more effective; this can be achieved through the participation of management (Lines, 2004) in planning, which can generate effective, informational, and emotional effects (Ketokivi and Castner, 2004). The authors also add that it is vital that top management gather a number of teams of coworkers from several hierarchical levels

and units to analyze past strategies and the organization environment to propose new goals, strategies, and how or what is necessary to achieve those purposes (Elbanna, 2008).

This contribution to the reinforcement of strategic planning and the practice of planning is also highlighted by researchers such as Ramanujam et al. (1986), and Tapinos et al. (2005) regarding the use of strategic planning tools to enhance the effectiveness of planning itself, meaning that there is a possibility that workers could be more involved or have a higher participation in strategic planning and giving analytic feedback, resulting in a commitment to the organization (Elbanna, 2008).

This level of adherence is a sign of workers' participation, suggesting the existence of a greater involvement (Mikkelsen, 2019) influencing work performance and job satisfaction positively (Matagi, 2022). Through this path, it is possible to chart the future of the organization through debates and discussions on the future strategies and objectives of the company, generating more participation in strategic planning.

As organizations increase planning due to market uncertainty, the increase in effectiveness passes through the collection of information and analysis by the many functional areas inside the organization; this translates into two components attached to strategic planning, namely, greater attention paid to internal functional coverage and integration (Mclarney, 2001).

Based on the assumptions of our theoretical framework, the hypotheses that emerged from the literature were:

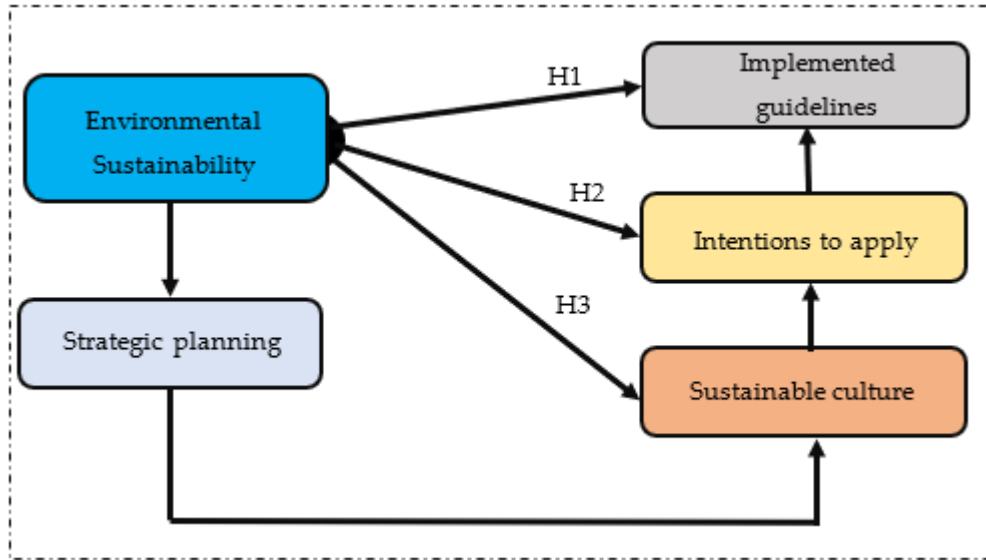
Hypotheses 1 (H1). Environmental guidelines can be implemented in strategic planning to increase workforce retention;

Hypotheses 2 (H2). If the restructuring of strategic planning includes retainment environmental messages, pro-environmental and top management behavior contribute to one's intention to apply them;

Hypotheses 3 (H3). Companies that provide environmental sustainability education and training to their employees and encourage them to share their knowledge and best practices with their colleagues will have a more sustainable corporate culture and better environmental performance than those that do not.

Based on the present literature review and the hypotheses formulated above, the proposed research model is presented in Figure 1

Figure 1. Conceptual framework of the study.



Source: Own elaboration

3. Methodology

3.1. Choice of Research Method

With recent global events, businesses have had to make changes following different stages worldwide. These situations cause the economy to fluctuate, creating challenges to prices, processes, services, and products, and for this reason, to the best of our knowledge, no prior studies on the effectiveness of strategic planning and the inclusion of a sustainable environment have gone sufficiently deep.

This research phenomenon involves a quantitative analysis of publications (Ellegaard, 2015), making a contribution to the organizational structure that requires a PRISMA methodology, which can address questions that could not be answered by individual studies and identify problems in primary research that should be rectified in future studies (Page, 2021). A bibliometric analysis is used to understand the necessary steps for our literature review and to support our questionnaires.

In this regard, management studies commonly agree that are several methods to examine an under-researched topic (Eisenhardt, 1989), providing the necessary information to answer our research question:

- *RQ1: How does environmental responsibility contribute to workforce retention*
- *RQ2: Does the incorporation of environmental guidelines into strategic planning lead to increased workforce retention?*

3.2. Research Method

To determine the contributions, trends, and challenges in the field of sustainability, strategic planning, and employee retention, Table 2 presents the following structure: to address the issues raised in this research and to identify relevant literature, a systematic literature review will be carried out using the PRISMA methodology (Table 2). The analysis of the results is based on five stages (problem definition, theoretical framework, bibliometric, content analysis, and the construction of the framework).

The literature review starts with what sustainable strategic planning supports and its relation to employee retention, including an overview of SP and the contributions of scholars to that object of study, ultimately to increase the effectiveness of contributions to an organization. The content analysis will allow us to identify topics on the subject of study and understand the challenges that need to be addressed in a theoretical framework.

Table 2: Research steps

Steps	Activities	Results
Step 1: Problem Definition	(i) Gap identification (ii) Formulation of the research	The relationship between environmental responsibility and workforce retention, as well as the role of environmental

responsibility in strategic planning.

Prisma methodology (Table 2), according to the three main stages: (i) Identification:

- (a) Structuring the keyword from the thematic axes “Environmental sustainability”, “environmental responsibility “, strategic planning”; “strategic planning effectiveness”, and “workforce”. (b) definition of the research protocol (search for the keywords, definition of the databases, publication type publication years, document types, categories); (c) deletion of duplicated papers; (e) inclusion and exclusion papers;
- (ii) Screening: (a) Reading the title and abstract of papers to identify those that are not aligned with the purpose of the papers and should be excluded; (b) Read the full papers to exclude those that have in consideration the purpose of this research;
- (iii) Included: (a) Description of the final pull of papers.

Step 2:
Theoretical
Framework

The final pull of papers:
74 papers. These explicitly discuss the challenges and contributions related to the subject of study.

Step 3:
Bibliometric
Analysis

- (i) Use the keywords to start the search, compiling/refinement of the database; (ii) Development of tables for descriptive analysis;
- (iii) Export the database

Characterization of the paper portfolio (evolution of publications, main journals, and main authors). And network

	to excel and a RIS file to VOSviewer; (iv) generate the VOSviewer clusters.	analysis (full counting and authors).
Step 3: Content Analysis	(i) Analysis of the main themes addressed in the research, (ii) Read the information and mapping the themes related to the thematic, (iii) Discussion among the researchers with the data.	The thematic analysis gives 74 papers and their respective subgroups (verified in VOSviewer network), being: Environmental Sustainability, Business Performance, Strategy, Management, and Sustainable Performance.
Step 5: Constructio n of the Framework	(i) Selection of the results from previous steps, allowing the production of insights by the research team; (ii) Mapping the information regarding the study.	The unification of the results in a theoretical framework to identify the strategic planning effectiveness in the organizations.

Source: Own elaboration

3.3. *Data Gathering*

To comprehend the trajectory of the collected data, we conduct a bibliometric study that will enable the identification of several items regarding citations, journals/authors, and keyword analysis. In the first stage of our literature research, we choose WOS (Web of Science) and Science Direct as the scientific databases that could gather the necessary information for our research having a high level of relevance in publications. The selected articles were peer-reviewed and considered relevant in the field of SP.

The survey started by merging the search terms related to the keywords: “*Environmental sustainability*” OR “*environmental responsibility*” AND “*strategic planning*” AND

“*strategic planning effectiveness*” AND “*workforce*”. The used terms are separated by the search axes which we use the Boolean index “AND” (to make the search connections) and “OR” for the returns of alternative or synonyms terms in those same search axes.

This search in the databases was conducted in November 2022 and did not have any specific timeline. Table 3 presents the search terms, search protocol, database, document types, publication type, language, and search period.

Table 3: Research Protocol

Search Term (Title, Abstract, or Keywords).	“Environmental sustainability”, “environmental responsibility “, strategic planning”; “strategic planning effectiveness”, and “workforce”.
Search Strategy	“AND”; “OR”
Database	Web of Science and Science Direct
Publication Type	Reviewed Papers and Research Papers
Language	English
Date	1983-2022
Publication Titles	3 916 results/16 Journals
Search Period	Not Specific

Source: Own elaboration

The initial search gives us a total of 154 862 results. Refining our search by adding Management (M1) categories gave a total of 14 120 articles. The refinement by document types (articles), gives a total of 11 629 results. Selecting English as the primary language gives 11 277 results. While filtered by publication titles (Table 4) we obtained 3 916 results

Table 4: Distribution of bibliometric research throughout journals and articles

No	Journal	Field	Total
1	<i>Sustainability</i>	M1	1 990
2	<i>Journal of Cleaner Production</i>	M1	1 151

3	<i>Business Strategy and the Environment</i>	M1	464
4	<i>Organization Environment</i>	M1	74
5	<i>Journal of Environmental and Planning Management</i>	M1	59
6	<i>Journal of Business Research</i>	M1	51
7	<i>Journal of Management Studies</i>	M1	9
8	<i>Management Decision</i>	M1	34
9	<i>California Management Review</i>	M1	16
10	<i>Sage Open</i>	M1	20
11	<i>Polish Journal of Environmental Studies</i>	M1	28
12	<i>Business Society and Review</i>	M1	10
13	<i>Long Range Planning</i>	M1	14
14	<i>Business Strategy and Development</i>	M1	14
15	<i>Global Business Review</i>	M1	15
16	<i>PLOS ONE</i>	M1	10

3 916 results

Source: Own elaboration

The second stage in PRISMA methodology (Figure 2) is screening; this included selecting the papers by reading all the abstracts and titles and verifying their relation to our study. In this process, we confirmed that the information, keywords, and terms were related to our study. After the selection was made, we reached a final selection of 74 papers.

Regarding the selection format, the papers encountered were found using a snowball method. Therefore, the studies and authors contribute continuously to the discussion and the development of SP efficiency. Moving forward in our search to answer the central question, it was possible to catalog the papers on aspects related to SP, DC, and efficiency improvement. These papers were eligible for bibliometric analysis, content analysis, and framework (Silva, 2022).

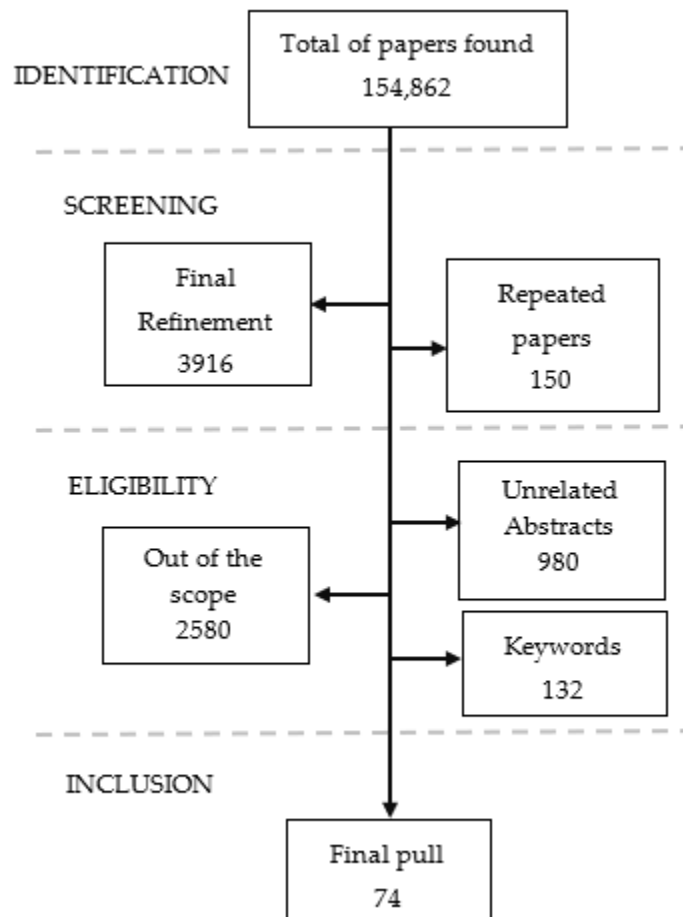
3.4. Inclusion data and Exclusion criteria

For this research, peer-reviewed journals were considered as a main source of knowledge. Our focus of inclusion was to select keywords and search databases, keeping out theses, white papers, book chapters, and blogs.

Considering the exclusion criteria, we rejected several articles that did not present any contribution directly, or had a practical application or theoretical information that did not comply with our research; in that sense, we ruled out:

- Ex1 Articles focused on blockchain programming;
- Ex2 Articles with specific relation to technological areas;
- Ex3 Articles focus on medical research;
- Ex4 Articles with specific relation to business implementation.

Figure 2: Methodology phases



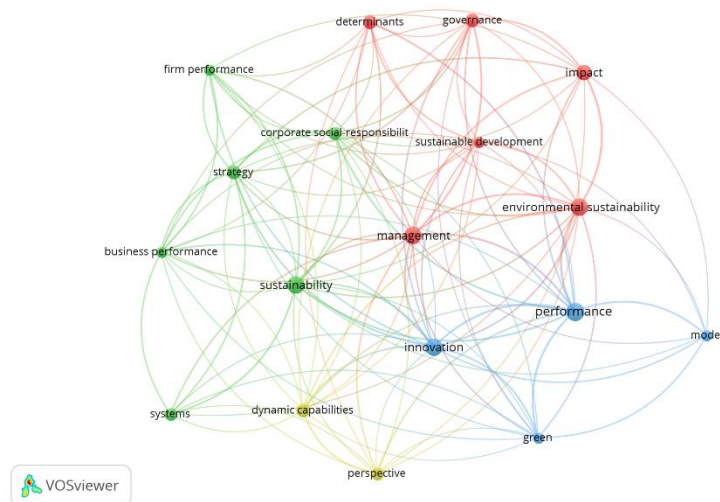
Source: Own elaboration

3.5. Co-occurrence of keywords

To analyze the keywords, we performed full and fractional counting with the final pull of papers (74). The construction of this analysis was made using VOSviewer software (Version 1.6.17) to understand network strength, clusters, and links.

In Figure 3, to structure our bibliometric network we made a full counting in which we could find four clusters (blue, yellow, red, and green), a total link strength of 198, and 18 items. We also could verify in this simulation that the links with higher strength were in relation to performance, environmental sustainability, management, and innovation.

Figure 3: Full Counting Keywords



Source: VOSviewer software (Version 1.6.17)

4. Data Description

4.1. Design

To conduct our research, we employed a quantitative method. We start our survey with a broad brief introduction to the study. Participants were advised to respond in an honest and sincere manner, having in mind that there were no right or wrong answers and that the confidentiality of the questionnaire was guaranteed. To create this questionnaire, we used Google Forms. The link was

shared on several social networks, such as LinkedIn, Facebook, WhatsApp, and via email between October 2022 to January 2023.

The survey consisted of two parts. The first comprised demographic features, including age, gender, academic position, and country. The second part of our study included the measurement of three constructs, namely IG (implemented guidelines), IA (intention to apply), and SCC (sustainable corporate culture). To facilitate the score interpretation, the present study uses a Likert-scale survey (Yamashita, 2022) to validate the questions presented with a five-point response scale (1—totally disagree; 2—disagree; 3—neither agree nor disagree; 4—agree; 5—totally agree).

4.2. Sample Characterization

Of the total respondents, 311 (Table 5) valid answers were obtained to the questionnaire, of which 44.7% were female, 53.7% were male, and 1.6% “other”. The survey was applied to those over 18 and in the labor force (employees). The modal age class was 18–25 years old (53.4%) and the second most frequent was 26 to 35 years old (31.2%).

Concerning academic qualifications, the sample was 1.8% basic education, middle school 41.8%, bachelor’s degree 38.2%, master’s degree 16.4%, and Ph.D. 1.8%. Regarding the geographical location (nationality), the target population is in the European Union. However, it was possible to understand that the largest groups are in Portugal and Poland, with 25.1 and 23.5%, respectively, and Italy with 14.4% is the third best represented country. With smaller percentages, we could also count countries such as Spain, Sweden, the United Kingdom, Chile, Hungary, Greece, Germany, France, Finland, Estonia, the Czech Republic, Ireland, Turkey, and Chile.

Table 5: Sociodemographic data

Characteristic	Classification	Total Sample (<i>n</i> =311)	Percentage %
Gender	Female	139	44,7
	Male	167	53,7
	*Other	5	1,6

Age	18-25	166	53,4
	26-35	97	31,2
	36-45	22	7,1
	46-55	18	5,8
	56-65	5	1,6
	Over 65	3	0,9
Academic Qualifications	Basic	6	1,8
	Middle School	130	41,8
	Bachelor's degree	119	38,2
	Master's degree	51	16,4
	Ph.D.	5	1,8
Country	Portugal	73	23,5
	Poland	78	25,1
	Italy	45	14,5
Employed rate	Employed	311	100

Source: Own elaboration

4.3. Data Analysis Procedure

The scales were adapted to English and translated into Portuguese, which was carried out by two persons with an extended experience in strategic planning and sustainability matters. Thereafter, the questionnaire was sent to 15 managers with different roles in their respective organizations to evaluate their level of comprehension of each item. Considering the sample size ($n = 311$), the study proceeded to assess/test, measure, and validate the variables/constructs under study in order. Using the SPSS IBM statistics (version 28.0) software, we used two-step procedure (Fayaz, 2022) and two multivariate data analysis techniques: a principal components analysis (PCA) followed by a multiple linear regression analysis.

We started by assessing the internal consistency of the answers, through Cronbach's alpha, followed by the application of the PCA, and then we validated the appropriateness of using the technique, through Kaiser–Meyer–Olkin (KMO) and Bartlett's sphericity tests.

In doing so, the measurement model assesses the validity and reliability of the sample used. Considering this information, we can verify, through KMO and Bartlett’s tests, the adequacy of the technique used (PCA). Second, the structure models were managed to measure the relationship between the variables and to test our hypothesis.

5. Results

In this section we present the main results in order to better clarify them to the reader. The factors obtained by the application of the PCA are presented in Table 6, which validates, in general, the theoretical model adopted. It can be concluded that the retained factor (obtained by the PCA method followed by Varimax rotation) has high factor weights for all items, except coworker availability, which is more significant than 0.40 (Bryant and Yarnold, 1995; Loehlin, 2004) and explains 58,182 percent of the total variance (which is considered satisfactory by Marôco, 2018). Therefore, the eigenvalues of the first three major components (PCA) have explained variances of 37,985, 10,796, and 9401 percent, respectively.

The values of KMO (0.868) and Bartlett (1,119,137, Sig = 0.001 < 0.05), statistically showing that the retained factor is appropriate to describe the correlation structure between the items, is also corroborated by Cronbach’s alpha (0.849) (Hutcheson and Sofroniou, 1999 state “middling: values in the 1970s”).

Table 6: Factors and items

<i>Factors and items</i>	<i>Loadings by factor</i>	<i>Total variance explained (%)</i>	<i>Cronbach’s alpha by factor</i>
F1- Green restructuring		37,985	0,765
Environmental Leadership	0,737		
Inclusion & Intention	0,753		
Messaging impact	0,700		
Behavior	0,670		
F2-Guidelines implementation		10,796	0,769
Employee impact	0,672		
Environmental incorporation	0,679		
Motivation	0,731		

Messaging & Retention	0,739		
F3-Sustainable education training		9,401	0,692
Training	0,725		
Knowledge & sustainability impact	0,751		
Education	0,770		
Co-Worker availability	0,333		
KMO	0,868		
Bartlett's test of sphericity	$\chi^2(66) = 1119,137$; Sig. < 0,001		
Cronbach's alpha total	0,849		

Source: Own elaboration

Legend: H1A (employee impact); H1B (Environmental incorporation); H1C (Motivation); H2A (Messaging & retention); H2B (Environmental Leadership); H2C (Inclusion & intention); H2D (Messaging impact); H2E (Behavior); H3A (training); H3B (Knowledge & sustainability impact); H3C (Education); H3D (Co- worker availability).

As previously mentioned, we used a Likert scale in the construction of the questionnaire. Qualitative variables were generated; we had to carry out a change in the measurement scale, so as to be able to apply a multiple linear regression (MLR), which was more robust and fulfilled the main application assumptions. For the scale measurement change, $ratio = \frac{scale\ value - 1}{4} * 100$ was used, as suggested in (Hair et al., 2017, p. 33).

In order to answer H1, we used an MLR, from which we present the main results in Table 7 below. It should be noted that the model obtained satisfies the main validation assumptions: the random variable of the errors has normal distribution with null mean value, homoscedasticity (change statistics), and no autocorrelation (Durbin–Watson test); the errors are random and independent ($cov(e_i, e_j) = 0, i \neq j$) and there is no perfect multicollinearity (collinearity statistics). The collinearity statistics (by VIF—Variance Inflation Factor) show both values are lower than five (Montgomery et al., 2012), which shows the non-existence of multicollinearity problems for the independent variables.

By graphical analysis and, in particular, by the application of the *Durbin–Watson* test, we verify the null autocorrelation of the residuals. The acceptance region, obtained with the support of the table for the referred test, is given by $[d_u; 4 - d_u] = [1.73; 2.28]$, considering that the test value (1.952) belongs to the obtained interval.

In relation to the model (obtained by the least squares method), we can verify that 36.1% of the total variations are explained by the regressors used, which can be considered reasonable given its context. The equation of the model is $H1B = 0.411 + 0.259 \times H1A + 0.447 \times H1C$ and the regressors are statistically significant (constant, $t_{(308)} = 3.155$, Sig. < 0.001; H1A, $t_{(308)} = 4.913$, Sig. < 0.001 and H1C, $t_{(308)} = 9.879$, Sig. < 0.001, where $t_{(n-k)}$ are pivot statistics with t -Student distribution with $n - 3$ degrees of freedom); the marginal contributions are positive, and the contribution of H1C is slightly more than twice that of H1A. Overall the model is statistically significant.

Table 7: Results of the Multiple Linear Regression

Model		Unstandardized Coefficients		t	Sig.	Collinearity Statistics		Durbin-Watson	Adjusted R Square	Change Statistics		
		B	Std. Error			Tolerance	VIF			F Change	df1	df2
<i>Dependent Variable</i>	(Constant)	0,411	0,130	3,155	< 0,001							
H1B	H1A	0,259	0,053	4,913	< 0,001	0,879	1,137	1,952	0,361	88,391	2	308
	H1C	0,447	0,045	9,879	< 0,001	0,879	1,137					

Source: Own elaboration

Concerning the second hypothesis, we obtained a matrix of Spearman's correlations (non-parametric coefficient is indicated for the type of scale measure used) which is shown in Table 8, under the hypotheses H_0 : *H2X is independent of H2Y* versus H_a : *H2X is dependent of H2Y*. From the table we can deduce that all correlations are positive, low but statistically significant, that is, in all the situations considered we reject H_0 .

In the next section we interpret/connect these results to the study.

Table 8: Results of the Spearman's rho

<i>Spearman's rho</i>	<i>H2A</i>	<i>H2B</i>	<i>H2C</i>	<i>H2D</i>	<i>H2E</i>
<i>H2A</i>	1	0,261**	0,360**	0,308**	0,291**
<i>H2B</i>		1	0,449**	0,374**	0,459**
<i>H2C</i>			1	0,467**	0,339**
<i>H2D</i>				1	0,465**
<i>H2E</i>					1
N	311	311	311	311	311

** Correlation is significant at the 0,01 level (2-tailed).
All the values of the *rho* are statistically significant at the 5% level

Source: Own elaboration

6. Research Findings

To test the first hypothesis (H_1), we used a linear regression assessing the model with the following measures: path coefficients (β), significance (p -value), R^2 , the effect size (f^2), and an interpretation of the variables. For the second hypothesis (H_2) Spearman's correlation was performed to understand and measure the degree of variables. The third hypothesis (H_3) was submitted to an independent-sample t -test (a non-parametric test).

H1. *Environmental guidelines can be implemented in strategic planning to increase workforce retention.*

The results obtained allow us to observe the final model and arrive at some conclusions regarding this study. To test this hypothesis, we used a linear regression, which allows us to see that the implementation of environmental guidelines in the organization strategic planning was significant ($\beta = 0.447$; $t = 9.879$, $p < 0.001$;). Additionally, it was possible to understand that the effect on implementing those guidelines into strategic planning led to a safer environment, helping employee motivation. The R^2 presents a value regarding the predictor's SAT score, showing that adding messages into strategic planning accounts for 0.365 employee motivation and retention in the workplace. A Wilcoxon signed rank test with effect size values (-0.196 and -0.2686) demonstrated that the strength between variables is below moderate. Regarding the remaining effects of our hypothesis, it was noticeable that the youngest generations (Sig. = 0.416) believe that this level of environmental inclusion in strategic planning changes the workforce view and how they behave in the organization (Sig. = 0.978).

H2. *If the restructuring of strategic planning includes retainment environmental messages, pro-environmental and top management behavior contributes to its intention to apply it.*

For this hypothesis, Spearman's correlation is used to understand each variable related to it. With that in mind, we could acknowledge that the incorporation of friendly environmental messages into planning becomes necessary to help the creation of a map that guides top management and its intentions to put those same plans into action. This can be achieved by constant pro-environmental behavior, which could subsequently be influenced strategically, resulting in the success of future operations. However, the inclusion of any environmental changes in strategic planning has a strong effect on any top management decisions and changes to the organization; as a result, variables such as commitment to sustainable practices could be uncertain and the impact on workforce retention could be higher. Lastly, the alignment between both top management and pro-environmental plans is a factor that can reinforce strategic changes, developing the intention to apply sustainable practices in the organization.

H3. *Companies that provide environmental sustainability education and training to their employees and encourage them to share their knowledge and best practices with their colleagues, will have a more sustainable corporate culture and better environmental performance than those that do not.*

As the assumption of homogeneity of variances was not substantiated, an independent t -test with a Welch correction was used. The higher results suggest that providing a sustainable environmental culture of education and training for employees has an effect on the overall company culture ($Z = 0.475$; $df = 130$; $\text{Sig.} = 0.963$). Top management, supervisors, and managers especially need to encourage employees to share their knowledge and best environmental practices to integrate the organization, first, for increasing teamwork, and second to improve performance ($Z = 0.332$; $df = 130$; $\text{Sig.} = 0.566$; $t = 0.517$). Additionally, if there is a greater unification of the workforce regarding the organization's goals, the disposition to work with top management will be greater ($Z = 0.873$; $df = 130$; $\text{Sig.} = 0.492$; $t = 0.517$), and the same for other management areas. These results have a 95% confidence interval.

7. Discussion and Conclusions

Our qualitative research fills the gap in organizational insights on strategic planning, employee retention, and a sustainable environment. The focus of our goals was to understand (1) the relationship between environmental responsibility and workforce retention and (2) the role of environmental responsibility in strategic planning. While decoding our results, we discovered that our first hypothesis was not confirmed. Strategic planning is defined as the alignment of the energy, resources, and activities of an organization to work towards a common goal (Grant, 1991; Rowlands, 2018; Amrollahi, 2018; Weston, 2022). To some organizations, the simple application of strategic planning still can be a hard task, translating severe long-term challenges for sustainable entrepreneurs and as a result more difficulty in retaining a workforce. During our hypothesis test, it became clear that the implementation of environmental guidelines can be a valuable asset for the future of the organization, but there is also the necessity for a higher effort from managers to make that information more appealing and attractive to employees, creating a favorable attitude towards the company.

Secondly, the results also suggested that it is necessary for top management and pro-environmental entities to work diligently on how environmental messages (their presentation and what managers want to communicate) can be transmitted to employees and what their behavior can be while learning them. Having a positive effect will lead to a higher rate of application from all members involved, and this will lead, as mentioned in our theoretical framework, to better use of the strategic planning mechanisms (Table 2), reinforcing present and future strategies.

Regarding the third hypothesis, companies constantly working on their stakeholders' education/training and encouraging them to share knowledge aligns with Baum (2001) and Frese's (2007) theory that employees should materialize their knowledge in the classroom alone. Participants of younger ages looking for another corporate culture and environment will apply for a job and the retainment of that same job at a higher rate. Compared to those that do not perform in the same manner, the results present greater unification, teamwork, and more ability to put strategic planning into practice.

In conclusion, our results suggest that the implementation of environmental guidelines for strategic planning contributes to the retainment of employees. This is believed that higher commitment from the organization, better motivation to stay, and pro-environmental and top management behavior will contribute to one's intention to apply it. It was noticeable that providing

environmental education/training and encouraging employees to share knowledge and best practices leads to a better environmental corporate culture and performance. This leads us to reflect on the corporation's behavior regarding their efforts to increase sustainability in their daily operations or long-term strategic planning; in practice, the time spent will always be a huge factor to consider and any action towards that kind of activity will take resources and severe changes in employee habits.

8. Theoretical and Practical Implications

This study contributes to the integration of a more sustainable environment inside organizations, the integration of strategic planning in the equation, and better solutions for the retention of the workforce with the inclusion of top management and pro-environmental behavior. Additionally, our population, being European, will allow future investigations into this phenomenon. In addition, our results reinforce the theory about the relationship between strategic planning and environmental sustainability.

At present, talent retention is considered the organizational goal of keeping the most productive talent and workers; this reduces significantly the cost and effort for an organization and could be improved if managers could consistently add to their strategic planning, creating future opportunities for those employed and new applicants. This initiative helps the organization to stand out from other companies as a reference in the market. Additionally, adding sustainable initiatives creates a positive image for several stakeholders, especially those in the new generation, which is more demanding. For this reason, this study tries to assess the importance of the environmental role in strategic planning and highlight the relation between sustainability and the constant necessity of training and education in sustainability to increase and improve employee retention.

Thus, for management specialists, this research adds credibility to the sustainability issue, which is a growing topic of concern all over the world when comes to creating new strategies and new ways to improve organizational practices. Strategic planning is reborn by becoming involved with other areas and adapting them to new contexts.

9. Limitations and Future Research

This study contributes to solidifying our knowledge regarding the research areas, and certain limitations were considered. First, although the questionnaire was sent to top management

promptly, due to their schedule and lack of time, sometimes the responses took more time than needed. In our sample, we verified that *Other (gender) was a small percentage (1.6%) of the total (five persons). They belong to the newer generation and there is great importance to knowing what their opinions regarding retention are, what their knowledge of planning is, and how sustainability can support their future endeavors.

Regarding future research, it could be interesting to transform this research into an experimental design to determine the cause and effect of sustainable education and training for millennials vs. generation X. With this research, we aimed to understand their retention needs and to what extent organizations have to change their guidelines and create new patterns to maintain their competitiveness and still develop employee mindset.

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Paper contributions to our research agenda

By trying to solve the ideocracies of management levels and contributing for the evolution of strategic planning by solving some of the related gaps we could discovered that it was necessary to add more variables and components into strategic planning for it to work. The new generations are more aware of their responsibilities and ask for organizations to be more conscious regarding several themes. One of the most controversial and important topics is environmental sustainability. Although in previous study it was explored the limitations facing top management and the workforce that hinder strategic planning, and how processes need to be adapted to engage different hierarchy levels in strategic planning for improved effectiveness.

We felt the need to go further and understand, in our second and third study, the role of strategic planning and environmental responsibility and if there is a correlation between workforce retention. In our study intituled: *Environmental sustainability for strategic planning effectiveness and organizational improvement*, we were able to conclude that the implementation of environmental guidelines into strategic planning contributes to the retainment of employees.

This is believed that higher commitment from the organization better motivation to stay and pro-environmental and top management behavior will contribute to its intention to apply it. It was noticeable that providing environmental education/training and encouraging employees to share knowledge and best practices will lead to a better environmental corporate culture and performance in opposition that those that do not. This leads to a reflection on the corporation's behavior regarding their efforts to increase sustainability in their daily operations or long-term strategic planning, in practice, the spent will always be a huge factor to consider and any action towards that kind of activity will take resources and severe changes in employee habits.

Fifth chapter: Independent Study

Quantitative methodology

Improving Strategic Planning: The Crucial Role of Enhancing Relationships Between Management Levels

Gandrita, D. M. (2023). Improving Strategic Planning: The Crucial Role of Enhancing Relationships Between Management Levels. *Administrative Sciences*, 13(10), 211.
<https://doi.org/10.3390/admsci13100211>

Associated question:

*What is the impact of the relationship between management levels on strategic planning?
How does this impact vary in contexts of resistance to change?
How does this impact affect talent retention and loyalty?*

Highlights:

- Changes on how feedback can be provided;
- Four Factors for Middle and Lower management;
- Overcoming resistance to change;
- Value in employee loyalty and in retention.

Improving Strategic Planning: The Crucial Role of Enhancing Relationships Between Management Levels

Abstract

Having a fruitful relationship with all levels of management can increase the likelihood of better opportunities within and outside the organization. In some environments, it is known that participation in strategic planning creates better overall conditions for all partners, better conditions for retention, and above all, loyalty to talent. The very acceptance of contributions to this desideratum entails knowledge sharing and knowledge management. Our study examines how the relationship between management levels can disrupt strategic planning, particularly in contexts of resistance to change, situations that can even affect talent retention and loyalty. The collection of data needed to improve and robustness what are recommendations and contributions to the organization, materialized in participant and non-participant observation data, in interviews and questionnaires allocated to the company. Our conclusions, therefore, reflect the continuation of a research study. This paper contributes to the literature of the work pursued by exploring how social actors and different stakeholders can make a difference in participating in strategic planning, and furthermore how they can overcome, in counterpoint, the limitations of possibly not being able to participate in such strategic planning. Our contribution will also result in a critical understanding of the need for talent retention and loyalty, highlighting how retention efforts, but especially the small nudges that are absolutely significant in terms of employee participation and then even for emotional pay purposes, are differentiators and can overcome, very concretely, resistance to change.

Keywords: Improvement; management levels; management roles; performance; retainment; strategic planning.

Abbreviations

CFA, Confirmatory Factor Results; JASP, Jeffreys's Amazing Statistics Program; TMT, Top management team; MM, Middle management; LM, Lower management; SP, Strategic Planning.

1. Introduction

Strategic planning has been advocated as a process of determining the major objectives, mission, strategies, and policies that govern allocating and acquiring resources to achieve organizational aims (Pearce, 1987; Glaister 1999). Although researchers (Steiner 1980; Mintzberg, 1994; Bonn, 1996; Gallo, 2019; Posch 2020) have seen its ups and downs over the years the question on how can the strategic planning can be effective in improving organizational performance continues to lie on every member of the organization (Langley, 2014).

To accomplish this achievement, strategic planning faced several challenges that might be considered failure factors with repercussions at various levels of the organization. For instance, to the best of our knowledge these difficulties could create more prolonged separation in relationships between management levels, increasing the likelihood of one's work becoming less meaningful, causing work pressure, and organizational impediments (Amabile, 1997; Hober, 2021).

Additionally, from this gap a barrier could get raised and bring a distorted perception, vague strategic priorities, and interpretation barriers (Del Val, 2003) which could be negatively perceived as resistance to change affecting retainment and loyalty. Although the responsibilities of each level are well defined, we understand that top management has to deal with the intense responsibility of making the company more competitive and sustainable for an extended period of time, middle managers have to execute and put in place the strategy with the difficult task of aligning and orienting their co-workers, and the employees must be able to comply with the given orientations and maintain the operations running.

To establish guidelines for improvement and give contributions to overcome challenges its required that the focal actor/actors know how to impact others and don't rely only on their single solutions but, search for answers within the stakeholders (Muller, 2019). In other words, to display organizational purpose and significance it is needed to shorten the distance between actors and straighten relations to increase opportunities and make a higher in the company while improving strategic planning.

In this paper, we examine how the relationship between management levels can disrupt strategic planning, particularly in contexts of resistance to change and have a prominent effect on talent retention and loyalty. Assuming that the culture of distance from top management is a diversity attribute that has a direct effect on company performance (Dzung, 2023) and that resistance to change is important in determining how resistance is manage having a significant

influence on the success or failure of change efforts (Warrick, 2022), we ask how is the relationship between the levels of management could be improved in order to give a participation in planning? What efforts are needed to increase participation and motivation within the organization? What can be made to have better retention and why the lack of it? and What are the factors that contribute to the resistance to change?

We examine these questions through a mix method setting. Our research will firstly introduce the literature on strategic planning to understand its relationship with the actors and the impact in the organizational process. The literature also includes subjects related to resistance of change affecting retention and strategic planning.

Second, we empirically analyze the organizations three levels (top, middle, and low management) to seek patterns regarding their work and participation in the organization's activities. This will be followed by interviews and questionnaires that will give the necessary information to answer our questions.

Third, the paper contributes to a critical understanding (Dempsey, 2010; Schabram, 2017) of exploring social actors and different stakeholders can make a difference in strategic planning participation and overcome our contributions and recommendations. Additionally, the need for talent retention and loyalty to increase participation, add knowledge participation, and knowledge management.

2. Strategic planning, Change, and Management Levels

2.1. Improvement and Disruption

Due to the growing demands from markets, governments, and citizens, several stakeholders were compelled to adopt new practices to improve their organizations (Bolivar, 2020). To put in place these adaptations and design initiatives, it required managers to establish a volume of processes, tasks, procedures, and stakeholder involvement which makes necessary the formalization of strategic planning as a guideline for achieving not only societal goals but organizational goals as well (Alcaide, 2018). The development and application of planning should be, as mentioned by Lee (2017), high quality providing a baseline for evaluating strategic performance that serves as a public relations document and a form of communication for external and internal audiences.

Additionally, this systematic process contributes to the overall accountability of those involved in the organization which helps them to make more transparent policies guided by clear goals and objectives (Guyadeen, 2023).

Although planning process can be used in any organization, several studies have denoted differences between the public and private sectors. To George (2017), there are more challenges in the public sector which could lead to a more bureaucratic process with managers less committed to their organization making processes more difficult (Boyne, 2002; George, 2019) compared to the private sector which the impact is noticeable.

Nevertheless, the principle of planning requires continuous improvement to maintain stability with markets and stakeholders remain the same. To Bossink (2002), these refinements can be made through the development and implementation of programs, identifying the improved areas, making a rigorous assessment of performance, understanding the viewpoint of every stakeholder, and reporting financially, socially, and environmentally level. The idea of having better results is also supported by Hellberg (2022) by stating that a strong involvement of people who work closely is necessary with the operations for the organization to be successful, in other words, a higher level of commitment.

However, despite planning benefits, managers rarely integrated this tool into scenarios and land-change simulations due to many challenges that could cause disruption and instability to the company (Herspergeret, 2018). Within the possibility of top management shows a more resilient and cautious foresight to prepare themselves for environmental shocks (Vecchiato, 2012), in moments of crisis, some managers disconnect from their teams and start to lead into a more divergent thought (Ranucci, 2022) creating disengagement and less receptiveness to focus on strategic future (Wang, 2022).

On the working force side, if managers cannot include a competency plan in strategic planning the possibility of uncertainty would be much higher and as a result, workers will not be able to take care of themselves and will be unable to build resilient work-life scenarios (Claus, 2019). This interference level can translate into inherent resilience which can harm operations and performance in the short-term and devastated supply chain efficiency, customer satisfaction, and service levels (Arji, 2023).

2.2. Resistance to Change and Retention

Resistance is defined as various forms of covert or open opposition against material actions, it is considered a vague term even though it has been deeply discussed and analyzed in different literature (Mumby et al., 2017). The term is often understood concerning organizational control (Ezzamel, 2001; Paulsen, 2015; Horvers, 2017) which is combined with several forms of resistance varying from open and concrete expressions such as protests or strikes to more subtle forms as non-complying with the routines, distancing in the shape of cynicism, humor, skepticism, gossip, and nostalgic talk (Sewell, 2002; Fleming, 2008).

It is also well acknowledged that this topic unveils dynamic, unrelenting, and unpredictable change becoming the norm and that resistance accompanies change, or lack thereof. However, whatever form resistance takes, it is considered one of the primary reasons change efforts fail (Erwin, 2010) and becoming skilled at effectively managing resistance has significant payoffs for companies while a lack of skills can have noteworthy costs (Burnes, 2015).

Resistance to change in management is considered a serious key topic in management (Fuentes, 2003) and determines an inability to change, with negative consequences on performance, which may be more noticeable in the case of centralization (Giannoccaro, 2018). Some of the motives involving resistance to change can include the changes in the working format of employees of which they could turn out to be either a nuisance or “bad apples.”

Personal reasons can also be a motive based on uncertainty about what that change will mean for the organization, conflict information, or lack of knowledge. As it was pointed out by Buckingham (2022) and Leinwand (2022), there are two main causes for potential resistance in organizations Internal (management philosophy, culture, structure, power, and control system) and External (markets, changes in technology, customer expectations, competitor’s activities, government legislation, quality and standards, and economy).

On the other side of the organizational coin, there is a significant value in employee loyalty, defined as a behavioral and attitudinal element (Cachón-Rodríguez, 2021) and retention as an intention to carry on within company activities (Book, 2019). Both these activities are relational variables of a long-term relationship, whose absence leads to undesirable outcomes for those involved in the organization, such as decreased productivity, employee satisfaction, and profitability (Cachón-Rodríguez, 2022).

2.1. Top Management Levels

The concept of MR, in the words of Alsawafi (2021), is generally defined as a management commitment towards improved qualities, which produces better and positive performance results (Tari, 2017) for the organization. Each management level requires this effort, in which without these relations it becomes difficult to attain any payback or return, especially for employee relations (Kim, 2012).

Considered one of the strongest and difficult relations to attain, top management primarily deals with strategic choices regarding environmental activities (Shahab, 2018) and, as a result, performs a task that is non-routine and invariably complex (Barr, 2008). Elbanna (2022) conceptualizes top management support as an exclusively positive phenomenon, its heterogeneity can be analyzed from two perspectives. First, the decision-making and the information processing highlight the positive impact of TMT in the company, if teams have a broader knowledge and skills that eventually provide teams with several resources to be used in the construction and making of strategic decisions for the organization (Knipperberg, 2007).

The second shows the need for an identity perspective, assuming that the diversity among co-workers produces a categorization that will stimulate interpersonal clashes and compelling conflict among team members (Jehn, 1999). This theory is also supported by previous studies that conclude that homogeneous teams positively affect group performance rather than heterogenous (Conlon, 1991).

Regarding Middle management, it is considered a part of the institutionalized structure in most companies but is also challenged by new organizational models (Diefenbach, 2011; Farrell, 2013; Foster, 2019). The term describes managers below top management but above operations in the hierarchy chain (Wooldridge, 2008). These levels of managers are for execute any strategy and self-managing the implementation process (Foster, 2019). Although change can be directed from the top, it is still essential for employees to understand its intent and change, as well as its implications,

Middle management needs to interpret strategy in an everyday context, communicate clearly, clarify their intentions to their subordinates and identify the actions required to implement daily strategy (Ou, 2014). They have the task of providing a conduit for employees to implement and accept the change (Stensaker, 2008). Additionally, middle management needs to be driven

through different mechanisms that shape the way organizational members think, namely, management control systems and the development of knowledge structures (Guo, 2011) which shape how organizational members think and act and also mobilize them (Rouhani, 2012) towards some actions contributing for the minimization of the resistance to change (Hortovanyi, 2021).

Finally, Lower management workers are an integral part of the success of the organization. These consist of employees that have attitudes, commitment, knowledge (Li, 2008), and skills that will be applied directly and used for organizational growth. These frontline supervisors play a vital role in the effectiveness of the institutions. Conversely, there is compelling evidence that lower management is excluded from the management decision process resulting in lowered job performance, and creating difficulties in retaining competent workers (Anzengruber, 2017).

This level of management typically has the most frequent or direct interaction with front-line employees (Chen, 2002) and due to their maintenance at the bottom of the pyramid, they are also less dependent on their behavioral capabilities (Chen, 2002). Furthermore, low-management employees tend to have a lesser impact on organizational performance when compared to other levels (Munjuri, 2013).

Lastly, it also becomes established that employees are less involved in the development of strategy, and even if there is an opportunity to be in that position, top management is not sure that they have the strategic intent or strategic awareness to fully support the company's strategy (Engberg, 2015).

3. Research Setting and Methods

To address both our research questions, *“what is the impact of the relationship between management levels on strategic planning, and how does this impact vary in contexts of resistance to change?”* and *“how does this impact affect talent retention and loyalty?”* we present a mixed methodology (qualitative and quantitative) study based on observations, interviews, and questionnaires from different management levels working on their respective areas of work. We present this as crucial research that can reveal some of the discrepancies and mechanisms in organizational strategic planning and relate to other less extreme cases within the same working area. The qualitative nature of our approach is reserved for top management and allows us to listen to our interviewees (Muller, 2019) ways of describing their points regarding planning, working tasks, and future plans. The quantitative approach allows is focus on middle and lower

management allowing us to gather more information regarding their views regarding planning, retention, and loyalty. This allowed us to understand and envision the present and future of an organization.

Finally, the participants were instructed to provide genuine and truthful responses followed by their own experience and understanding of their line of work. There were no correct or incorrect answers, and their confidentiality is protected.

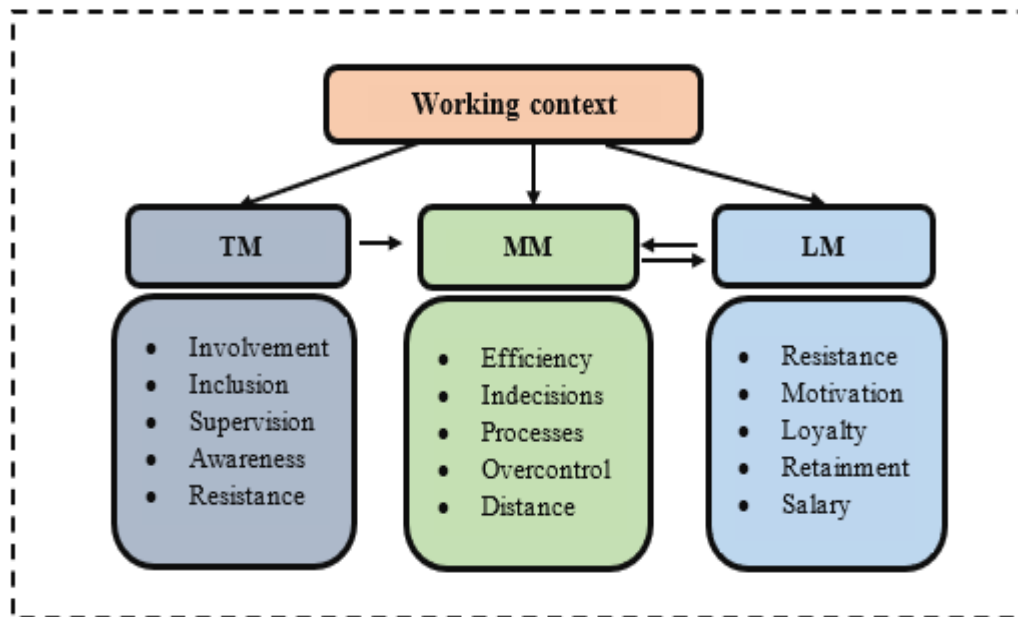
3.1. Empirical Setting and Context

According to the aim of our research and the present context, it has come to our understanding that organizations need a new approach to solve some issues that may be a disruptive factor in their future competitiveness. With that in mind, it was point it out by researchers the (Table 1) lack of involvement of top management in the overall operations and sometimes the non-inclusion of middle/low management in strategic planning (Hermano, 2016, Elbanna, 2021).

Middle management (Table 1) must re-value the processes and work on efficiency, not delay decisions and procedures, and be open to welcome other's opinions. Sometimes overcontrol becomes harmful for the organization and social interactions (Balogun, 2004; Schuler, 2023), the distance between workers to be more assertive causing conflict, and the non-use of instruments to evaluate performance.

For last, lower management (Table 1) is resistant to change in several situations, the need to introduce new patterns for workers be more loyalty to the organization and its supervisors, and the motivation to work increasing the organization profile, identifying the talents within and their needs (Lines, 2015).

Figure 1: Working context



Source: Own elaboration

4. Data collection

4.1. Qualitative Approach

A semi-structured interview and purposive method was used to recruit executives with expertise in management area. Sampling and data collection continued until the ongoing analysis revealed data redundancy (Aceituno, 2022). The inclusion criteria were; strategists, administrators, and board members. The question guide was developed based on previous experiences and literature review of researchers. Subsequently, all the disclosed information was listened to carefully and used their answers to asks for further clarification.

The information (Table 1) was collected based on 14 participants perspectives, but only 14 had the required information for our research. In addition, face-to-face interviews encourage participants to continue talking, to give relevant information, and give details. The Zoom platform (www.zoom.com), Portugal was also used for interviews. We ask permission to record the video and the audio from each participant using an informed digital consent form. In order to guarantee confidentiality, each participant was assigned with an alpha-numeric code. Each interview lasted between 00:30 minutes and 00:53 minutes.

In our sociodemographic data we could determine that 50% of the respondents were female and the remain 50% were male. The respondents with the ages between 18-25 years old registered a rate of 35,7 %, from 26-35 with 28,6%, the ages from 36-45 have 14,3%, followed by the ages between 46-55 with a rate of 21,4%. The countries with a higher percentage were Portugal with 35,7%, Poland and Greece have 14,3%, and the remain countries have a total of 35,7%. In terms of organization type, we have a percentage of 78,6% in private and 21,4% in a public company. The economic size is established according to the dimension of employees that work within, in that sense, below <500 employees it has 71,4%, between 501-999 has 21,4%, and above 1000 workers it has 7,1%. Finally, the working sector with a higher rate of respondents is technology with 50%, management 35,5%, Education with 7,1%, and Food with 7,1%.

Table 1: Sociodemographic data

Characteristic	Classification	Total Sample (n=14)	Percentage (100%)
Gender	Female	7	50,0
	Male	7	50,0
Age	18-25	5	35,7
	26-35	4	28,6
	36-45	2	14,3
	46-55	3	21,4
Country	Portugal	5	35,7
	Greece	2	14,3
	Poland	2	14,3
Organization	Other*	5	35,7
	Private	11	78,6
	Public	3	21,4
Economic Size	<500 workers	10	71,4
	501-999 workers	3	21,4

	>1000 workers	1	7,1
Working sector	Technology	7	50,0
	Management	5	35,5
	Education	1	7,1
	Food	1	7,1

Source: Own elaboration

4.1.2. Results

The participants talk about their experiences regarding the topic resulting in valuable data that helps to answer our questions. We observe and try to unveil several sides of the interviewees that could help us to give answers with new information that can contribute to a higher inclusion of strategic planning and organizational growth. During our interviews we posed the following questions:

1) What do you consider essential for the implementation of strategic planning?

To answer this question anonymous interviewee number four states that is required *“frequent feedback about the new implementation and the new results are crucial as long as with often training”*. The anonymous interviewee number eleven add that strategic planning is *“time spent by each employee on certain tasks “and “when creating a strategy employees need to focus on optimizing their workflow or even change their daily duties creating a place for them also developed themselves”*.

2) In your opinion, what contributions can your employees make to improve strategic planning?

In this question, it was possible reach to a consensus by interviewees that they generalize the importance of sharing knowledge and expertise benefiting strategic planning with innovative ideas and that feedback on company metrics could increase customer satisfaction, productivity metrics, etc., without the fear of being punished. Interviewee number ten highlights that employees must make the exercise of *“how they see themselves working within the next years, what does he/she want to achieve in the company, and what should be changed in order to function better”*. In

insight, it is pointed out in *“what are the pain of the organization and what needs to be fixed, seeking that gap between competitors”*. Additionally, the creation of a survey or individual talks can contribute to understanding ideas and opinions. Interviewee number thirteen also underlines the importance of employees knowing *“how to handle customer leads to achieve the desire profit margin. And on those rare occasions when employees actually get to see the company financials”*.

- 3) Describe a situation in that communication did not go as expected in the workplace? How do you think communication could have been more effective in that situation?

To address this question interviewees three and four considered 360° review a great tool to assess communication and other issues. However, it can be considered misleading because *“it can lead to false interpretations and false decisions”*. A factor that can decrease effectiveness in the workplace, especially in international teams can be language and cultural diversity, in this stage top managers must improve relations through *“live meetings and team bonding activities to better understand each other”*. The improvement of communication should be ensured *“by all parties involved in the communication process, understanding the same language, terms, and definitions. This can be achieved by providing clear and concise instructions, asking questions, and clarifying any ambiguities”*. The tenth interviewee also adds that it is *“important to establish regular check-ins or status updates to ensure all the involved are on the same page”*. Lastly, the thirteen interviewer states that some there are some points that should be addressed for future improvement: *“Delayed communication from leadership, forgotten hybrid or remote employees, lack of accountability after the fact, confusion amid change, a lack of knowing leads to negativity, employee mistrust, absenteeism, and low morale, and bad interpersonal relationship”*.

- 4) Describe your relationship with your peers, department, directors, and other employees?

Top managers understand that they do not have all the answers to all situations in the organization and that is necessary to have a closer relationship with their peers, meaning that (twelve interviewee), to have better relations the *focus “should be on building trust, being a good listener, aligning goals and priorities, seeking feedback, being empathetic, and supportive”*.

- 5) How can you create stronger relationships with the company’s employees?

It is reached consensus that relationships need to be better for organizational goals. However, it is also important to build a stronger relationship with employees to create a *“positive impact on their job, satisfaction, motivation, and overall productivity”* (interviewee nine/twelve). Sometimes managers should ask about their hobbies, interests, and families. This will create more proximity and create an environment where *“employees feel comfortable approaching with questions that concern them”*. The thirteen interviewees also underline some elements that can be considered value for: *“Bond of trust, merge the gap with communication, appreciate your employees, be friendly to your employees, respect them, implement autonomy, show value, and one-to-one interactions”* (Fourteen interviewee).

- 6) Which areas most need your attention at the strategic planning level? In your experience what can be done differently to improve the mentioned areas?

To some executives the areas that need more attention are human resources by enhance communications between employees, technology which needs to implement *“good techniques of programming software and guiding throw good and agile methodologies”* (second interviewee), and the sale department which need to be more goal-oriented and shared those objectives to the remain organizational colleagues for everybody understands, be aligned, and have a common goal (third interviewee). The improvement should be made during brainstorming with employees and peers, have a *“clear understanding of the company priorities and a roadmap that identifies the technology initiatives that will support those priorities”* and the *“hiring and retaining top talent as a critical factor to the success”* (interviewee ten). For the selling department, interviewee eleven stated it should be created a playbook with guidelines in which every member could consult and help with the daily challenges. This is upgraded by showing the benefits of the plan, tailoring your pitch to their audience, communicating the progress, leveraging feedback, and inviting others’ ideas (Interviewee thirteen).

- 7) From your perspective, what disruptions can there be in strategic planning? What are the solutions to these changes?

In this question, the first interviewee thinks that the biggest disruption could be the *“changes in the leadership, staffing, or resources availability”*. The third interviewer states that the main disruption is that the lower management level *“does not understand the importance of a common*

understanding of the goal and the scope of the organizations” and that, as a solution, it could be necessary to deploy *“external consultants with prestige and authority that may help to initiate the right improvements and changes”*. However, the tenth interviewee considers that the common disruptions in strategic planning are market changes, technological advancements, competitors, economic shifts, and consumer behavior. As a solution for these interferences, a revision and revisit of strategic planning and the creation of contingency plans to address these situations. Other critical disruptions (interviewee eleventh) are related to the loss of crucial employees, motivation, and resources. This respondent considered that although some companies lose potential employees, there is immense talent in the market and uncover knowledge that could contribute to the organization. Lastly, it is brought to our attention the importance of having a faster decision, interviewee thirteen mentions that with *“innovation at the forefront of all. All too often, this translates into strategic planning that taken weeks to finesse becoming obsolete soon after their inception”* and *“if teams are slow to adopt the plan, it will become outdated and irrelevant to everyday process and priorities”*.

8) In your experience, what solutions do you consider viable to overcome resistance to change?

To overcome the resistance to change, the first and main topic among all interviewees is that communication is the foundation of surpassing that resistance. In that segment, the interviewee adds that employees need to see the reasons for the change, the expected benefits, and how that change will be implemented. The fourth interviewee specifically needs to talk more often to senior management and add visual results on any small change. The openness to input is also a variable that needs to be considered, interviewee ten adds that it is necessary to search for feedback and suggestions for to employees feel more invested and reduce their resistance. This was supported by the thirteen interviewee that include *“support, agreement, co-opting, and coercion”*.

9) What factors do you consider indispensable for talent retention?

It is considered indispensable for talent retention Competitive compensation which *“organizations need to offer salaries and benefits that are competitive with other organizations in the industry”* (first interviewee). Other factors like a good track record, knowledge, being a motivated employee,

proven onboarding and training to coworkers, mentoring, and career development programs, remote work, work-life balance, relevant benefits, and an enjoyable workplace.

10) Describe how important is for you the integration of your team and how can it contribute to companies strategic planning?

Integration for top management is a synonym of *“productivity, innovation, and creativity”* (First interviewee). Another part is cohesion and collaboration in which is possible *“to leverage each other’s strengths and compensate for each other weaknesses”* and also be able to *“value employee’s ideas and opinions”* (Tenth interviewee). This could be achieved by *“fostering an environment that values diversity and inclusivity, encourages open communication and collaboration, and provides opportunities for team building and skill development.*

11) What benefits can be made available to employees to increase their participation in the organization?

Regarding benefits, managers conclude that to increase participation in the organization employees should have a better work-life balance, new positions with new challenges, reward performance, on-the-job training, mentoring, workshops, and courses. Additionally, the thirteen interviewee talks about three types that could help employees to engage in their work. Being cognitive, emotional, and physical engagement.

4.2. Quantitative approach

The quantitative approach was used to analyze the middle and lower management. We start our questionnaire with a broad and brief introduction to the study which we give some guidelines stating to each respondent that there weren’t right or wrong answers, and their confidentiality was insured. The creation of the questionnaires was made through google forms online survey and were written in such a way that the respondents can read and react to the questions (Razek, 2008). The link was shared on several social networks, such Facebook, LinkedIn, via E-mail, WhatsApp, and some were called to answer in person.

This survey consists of two parts. Firstly, the sociodemographic features of each inquiry who responded to our sociodemographic questions (Table 2) including gender, age, academic position, management level, and country. The second part is perceived by the analysis of the results using

instruments to analyze reliability (with Cronbach’s Alpha), assess and find patterns (using the exploratory factor analysis (EFA)) and, finally, measure and confirm the relationships between the suggested patterns (using the confirmatory factorial analysis (CFA)). To help the validation of our questions, a *Likert* scale was presented to the inquiries with a five-point response scale (1 – totally disagree; 2 – disagree; 3 – neither agree nor disagree; 4 – agree; 5 – totally agree).

From the initial sample, only 204 within the scope were considered eligible for our survey. With that in mind, we could determine that 46,57% were female, 51,9% were male, and Other have 1,47%. The participants were all above the legal age of working. The higher age is between the rate of 18-25 years old with 34,8%, from 26-35 years old we present 38,73%, from 36-45 years old we registered a percentage of 16,18%, the ages between 46-55 years old we could see a percentage of 7,84%, and the remaining ages (56-65 years old) have 1,96%, and over 65 years old) present a percentage of 0,49%. Concerning school qualifications, some of our samples have the basic education with 0,98%, in the middle school we could registered 23,53%, bachelor has 35,78%, master’s degree with 36,76%, Ph.D. with 1,96%, and other qualifications 0,98%. As previously mentioned, the management levels studied with this method (quantitative) are the Middle that registered 37,25% and the Lower management with 62,75%. Lastly, the counties with higher rate are Portugal with 25,49%, Poland with 22,55%, United Kingdom with 21,57%, and the remaining with small percentages make a total of 30,39%.

Table 2: Sociodemographic data

Characteristic	Classification	Total Sample (n=204)	Percentage (100%)
Gender	Female	95	46,57
	Male	106	51,96
	Other	3	1,47
Age	18-25	71	34,80
	26-35	79	38,73
	36-45	33	16,18
	46-55	16	7,84
	56-65	4	1,96

	Over 65	1	0,49
	Basic education	2	0,98
	Middle School	48	23,53
Academic Qualifications	Bachelor's degree	73	35,78
	Master's degree	75	36,76
	Ph.D.	4	1,96
	Other	2	0,98
Management Level	Middle	76	37,25
	Lower	128	62,75
	Portugal	45	25,49
	Poland	46	22,55
Country	United Kingdom	44	21,57
	Other	62	30,39

Source: Own elaboration

4.2.1. Data Procedure

The scales and the question were written in two languages (English and Portuguese) and revised by two persons with knowledge in areas of strategic planning and human behavior. After we finalized this process, the survey was sent to random people to give their feedback regarding the perceptibility and understanding of the questions. Our choice of method (quantitative) is related with the fact that some of the workers felt uncomfortable to be recognized as the ones that answer a questionnaire related to the organization.

To assess/test, measure, evaluate, and validate the constructions we are going to use JASP software (Jeffreys's Amazing Statistics Program, version 0.7.1). We start by assessing the consistency of the responses using the Cronbach's Alpha. Then, to discover patterns/relationships and reduce dimensions, we applied a principal component analysis (PCA). Given that some

dimensions were not reflected in any of the components, and to improve the different evaluation measures of the analysis, we removed these dimensions and obtained 4 principal components with measures that demonstrate a high robustness in the application of the method.

The Cronbach's Alpha was applied to assess the consistency of the components obtained. Finally, a confirmatory analysis was applied to validate and measure the relationships between components/factors and the weights that dimensions have in the different factors, finishing with a multigroup analysis to identify differences between lower and middle management.

4.2.2. Results

In this topic, we present the main results for the reader. In relation to the internal consistency, measured by the Cronbach's alpha (Cronbach, 1951), we obtained values that are at least considered acceptable. The work of Nunnally (1978) provided that the lower cut-off (i.e., 0.70) was appropriate in the early stages of research (i.e., exploratory), as is the case. The values obtained, total or partial values, are rounded off, equal or great than 0.70 (Cortina, 1993).

To reduce the dimension, and to obtain a pattern of association of items, a principal component analysis (exploratory data analysis) was applied. In a first analysis, and after Varimax rotation, we found that 4 of the 25 items were not reflected in any of the 4 components obtained (using the retention criterion of the items with eigenvalue >1 and loadings greater than or equal to 0.5 (Loehlin, 2004; Bryant, 1995) and Varimax rotation) (Table 3). Given the type of data under analysis, we obtained measures of adequacy that can be considered good, as shown in the tables 3 and 4 (sampling adequacy test, Kaiser-Meyer-Olkin (KMO) = 0.885, sphericity test, Bartlett's test with $\chi^2(210) = 1638.957$; Sig. < 0.001 and, proportion of cumulative variance equal 55,2%).

Table 3: Component Loadings

Factors and items	PC1	PC2	PC3	PC4	Cronbach's alpha by component
F1- Employee Engagement					0.866
Skills- Q17	0.82				
	2				
Feedback - Q14	0.77				
	6				
Appreciation- Q13	0.77				
	1				

Growth- Q16	0.76 3	
Participation- Q18	0.68 1	
Job retention- Q15	0.58 8	
Encouragement- Q10	0.52 4	
F2- Organizational Development		0.780
Intentions- Q22	0.73 7	
New perspective- Q20	0.72 3	
Collaboration- Q21	0.66 8	
Bureaucracy- Q4	0.59 8	
Communication- Q2	0.59 2	
Guidelines- Q3	0.55 5	
F3- Employee Motivation		0.663
Teamwork- Q11	0.65 2	
Training- Q9	0.62 0	
Perks- Q7	0.60 4	
Work satisfaction- Q12	0.50 0	
F4- Sustainable Inclusion		0.730
Environmentally messages- Q23	0.66 5	
Sustainable training- Q24	0.62 0	
Inclusion- Q25	0.61 7	
Interaction- Q19	0.57 5	
KMO		0.885
Bartlett's test of sphericity	$\chi^2(210) = 1638.957$; Sig. < 0.001	
Cronbach's alpha global		0.889

Source: JASP software (version 0.7.1)

Table 4: Component Characteristics

Principal components	Unrotated solution			Rotated solution		
	Eigenvalue	Proportion variance	Cumulative	SumSq.	Proportion	Cumulative
				Loadings	variance	
PC1	6.699	0.319	0.319	4.172	0.199	0.199
PC2	2.496	0.119	0.438	2.901	0.138	0.337
PC3	1.225	0.058	0.496	2.318	0.110	0.447
PC4	1.173	0.056	0.552	2.202	0.105	0.552

Source: JASP software (version 0.7.1)

A confirmatory analysis was performed to investigate the four factors which confirm the goodness of the model fit (Table 5). In this study, the model was assessed by Chi-square goodness of fit statistics ($P < 0.001$, $df = 183$) we encountered satisfactory results (CFI=0.932, RMSEA=0.065, 95% confidence interval, $\chi^2=285.166$) (Marôco, 2021).

Based on the results, 4 factors whose eigenvalue (Table 4) values present, a lower value was presented in the simulated model than in the real model. By performing a CFA was we could evaluate this new model and reach the following results. These were supported by values determined on the Chi-square ($P= <0.001$, $df=132$, CFI=0.899, RMSEA=0.052, 90% confidence interval, $\chi^2=524.821$). The most important goodness-of-fit indices, presented on the Table 5 below and in bold, generally indicate a good model fit (Marôco, 2021).

Table 5: Fit measures

Index	Value
Comparative Fit Index (CFI)	0.932
Tucker-Lewis Index (TLI)	0.922
Bentler-Bonett Normed Fit Index (NFI)	0.902
Information criteria	
Log-likelihood	-
	18665.809
Number of free parameters	69.000
Akaike (AIC)	37469.618
Bayesian (BIC)	37698.569
Other Fit measures	
Root mean square error of approximation (RMSEA)	0.052

RMSEA 90% CI lower bound	0.040
RMSEA 90% CI upper bound	0.064
Standardized root mean square residual (SRMR)	0.055
Hoelter's critical N ($\alpha = .05$)	155.208
Hoelter's critical N ($\alpha = .01$)	165.838
Goodness of fit index (GFI)	0.985

Source: JASP software (version 0.7.1)

Thus, the four-dimensional model fitted to the sample shows reasonable/good quality of fit. Based on Table 6, we can see that the correlations/scores between factors, between items and between factors and items are statistically significant.

Table 6: Factor loadings

Factor	Indicator	Symbol	Estimate	Std. Error	z-value	p-value	95% Confidence Interval	
							Lower	Upper
F1	Q17	λ_{11}	25.907	1.741	14.881	<.001	22.495	29.319
	Q14	λ_{12}	21.980	1.629	13.494	<.001	18.788	25.173
	Q13	λ_{13}	18.143	1.701	10.663	<.001	14.808	21.478
	Q16	λ_{14}	21.188	1.908	11.104	<.001	17.448	24.928
	Q18	λ_{15}	16.717	1.610	10.384	<.001	13.562	19.872
	Q15	λ_{16}	17.531	1.722	10.182	<.001	14.156	20.905
	Q10	λ_{17}	13.071	1.881	6.950	<.001	9.385	16.757
F2	Q22	λ_{21}	15.473	1.391	11.121	<.001	12.746	18.200
	Q20	λ_{22}	12.992	1.300	9.997	<.001	10.445	15.539
	Q21	λ_{23}	16.152	1.237	13.062	<.001	13.728	18.575
	Q4	λ_{24}	10.556	1.102	9.581	<.001	8.396	12.715
	Q2	λ_{25}	8.936	1.591	5.615	<.001	5.817	12.056
F3	Q3	λ_{26}	7.787	1.305	5.968	<.001	5.230	10.344
	Q11	λ_{31}	7.675	1.133	6.772	<.001	5.454	9.896

							95% Confidence Interval	
Factor	Indicator	Symbol	Estimate	Std. Error	z-value	p-value	Lower	Upper
	Q9	λ_{32}	10.628	1.354	7.847	<.001	7.974	13.283
	Q7	λ_{33}	10.046	1.247	8.055	<.001	7.602	12.490
	Q12	λ_{34}	11.017	1.304	8.446	<.001	8.461	13.574
F4	Q23	λ_{41}	20.068	1.645	12.199	<.001	16.844	23.293
	Q24	λ_{42}	15.533	1.562	9.947	<.001	12.472	18.593
	Q25	λ_{43}	16.347	1.854	8.817	<.001	12.713	19.980
	Q19	λ_{44}	13.048	1.849	7.055	<.001	9.423	16.673

Source: JASP software (version 0.7.1)

With the results presented above we can confirm the 4 factors obtained in the exploratory analysis initially presented.

Figure 2 presents diagrammatically the CFA Global Model with unstandardized estimates. Based to the results presented, it was possible to understand the ranges associated with each one of the four factors. Sustainable inclusion (F4, see Table 7) expressed the importance of certain practices that contribute to company success. These can be achieved by introducing a belief that involving everyone in the organization's strategic planning can increase competitiveness and promote a collaborative approach to decision-making. The results also indicated that it is necessary to have good interaction with all employees to achieve higher effectiveness compared to a distant relationship with no attachment between different hierarchy levels emphasizing communication and positive workplace culture. To increase strategic planning proficiency, it is necessary to adapt to new settings and promote sustainability inside the organizations. These changes can be achieved using environmentally friendly messages and behaviors from top management, contributing to retention and the intent to apply planning. Additionally, it is needed for everybody within the organization to continue receiving training and education on environmentally friendly actions to improve company results and environmental awareness. This action highlights the importance of ongoing learning and development in the workplace.

Regarding Employee Motivation (F3, see Table 7), we could understand that employees who are happy with their career path are likely to stay in the organization reducing redundancies, which can lead to reduced turnover and associated costs for the company. Our sample (74,6%) also indicates that individuals with academic achievements have already defined their career path and

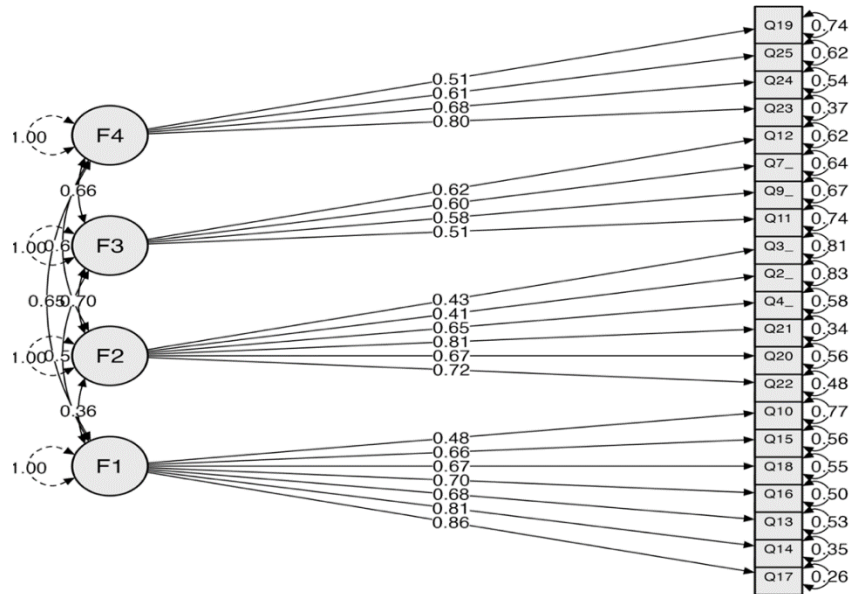
are more committed to their job managing better their perspectives and expectations. For most teams, the satisfaction of achieving joint goals is a motivating factor. However, when new positions or activities require specific training, they feel that the company needs to provide training to improve job performance. This reinforcement and encouragement due to the development of competencies can further enhance employee motivation and increase performance.

In Organizational Development (F2, see Table 7), strategic planning is crucial, and it should involve both-way communication with top management for renovating or updating strategies. When guidelines are effectively transmitted, workers can align their efforts towards common goals and work efficiently. The application should contain a streamline of procedures that increase efficiency and reduce delays. In addition, the integration of diverse perspectives enhancing the comprehension and effectiveness of the organization by tapping into the creativity and knowledge of a diverse workforce, generating innovative solutions that cater to different needs and preferences. Collaboration is also an important aspect of planning. By encouraging everyone with ideas it's possible to harness collective intelligence and create a sense of ownership and commitment towards achieving shared goals. Finally, it is necessary to consider the impact of everyone's actions on the environment and take steps towards sustainable development. This measure can not only attract and retain environmentally conscious employees but also enhance the organization's reputation and contribute to long-term success.

Employee Engagement (F1, see Table 7)- is a critical component of a successful organization and it requires creating an environment that fosters trust, respect, and open communication. Encouraging employees to share their knowledge and expertise will make them feel valued for their contributions and empower them to share their ideas, in other words, the higher the contribution they invested in the organization's success. Employees need to feel appreciated for the hard work that they put in because it is essential for motivation and job satisfaction. This acknowledgment can come in several ways, including recognition from management, opportunities to grow and develop, and a positive work environment. Furthermore, when positive feedback comes from a close person in the workplace the probability of acceptance and investment in the organization is higher. Employees also need to have a proactive attitude by contributing to a culture of continuous learning and development increasing job satisfaction. As their willingness to get training increases, the interest of their leaders in their ability to acquire new responsibilities and invest time and money in their growth. As a reflection of the efforts placed into a more

effective organization, there is a higher the probability for top management to let them participate in strategic planning contributing to the re-shape the organization’s future direction.

Figure 2: Global model



Source: JASP software (version 0.7.1)

Table 7: Global model representation

F1- Employee Engagement	F2- Organizational Development	F3- Employee Motivation	F4- Sustainable Inclusion
Q10- Encouragement	Q03- Guidelines	Q12- Work Satisfaction	Q19- Interaction
Q15- Job Retention	Q02- Communications	Q07- Perks	Q25- Inclusion
Q18- Participation	Q04- Bureaucracy	Q09- Training	Q24- Sustainable training
Q16- Growth	Q21- Collaboration	Q11- Teamwork	Q23- Environmental messages
Q14- Feedback	Q20- New perspectives		

Q17- Skills	Q22- Intentions		
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Source: Own elaboration

After reviewing the overall results obtained in the Global Model, we conduct a Multigroup analysis ($\chi^2(366) = 524.821$, $p\text{-value} < 0.001$, $CFI = 0.932$, $RMSEA = 0.065$) approach to gain a deeper understanding of the ranges that applied to each level of management (Figure 3 and Figure 4). This approach allowed us to identify specific areas where improvements can be made at different levels of the organization.

This can lead to more targeted and effective solutions, resulting in better outcomes for the organization as a whole. To achieve our desired outcomes, we utilize a model fit and a coefficient of determination. These tools enable us to draw the necessary conclusions.

Thus, from the difference of the chi-square values of the model with equal covariances and the chi-square with free covariances, approximately zero, we conclude that for the invariance of the covariances between factors in the two groups. The difference between the CFI values is -0.033, lower than -0.01 (Marôco, 2021) and therefore demonstrating the model invariance, though there are some absolute differences between the coefficients of determination in the two groups, as shown in bold in Table 8.

By analyzing the data in this way, we can tailor make our strategies and interventions to address the unique needs and challenges of each management level.

Table 8: Model Fit for multigroup analysis

Index	Value
Comparative Fit Index (CFI)	0.899
Tucker-Lewis Index (TLI)	0.885
Other Fit measures	
Root mean square error of approximation (RMSEA)	0.065
RMSEA 90% CI lower bound	0.052
RMSEA 90% CI upper bound	0.077
Goodness of fit index (GFI)	0.976

Source: JASP software (version 0.7.1)

Based on the Model Fit for multigroup analysis we proceed to a coefficient of determination, the maximum value ($R^2=1$) in Lower management with 0.763 (Q17) and the smallest value with

0.181 (Q3). Regarding Middle Management, the high value is 0.723 attributed to Q17 and the lowest with 0.126 concerning Q2.

Table 9: Coefficient of determination

	R²	
	Middle Management	Lower Management
<i>Q17</i>	0.723	0.763
<i>Q14</i>	0.684	0.623
<i>Q13</i>	0.444	0.509
<i>Q16</i>	0.536	0.438
<i>Q18</i>	0.468	0.449
<i>Q15</i>	0.418	0.486
<i>Q10</i>	0.138	0.404
<i>Q22</i>	0.410	0.742
<i>Q20</i>	0.368	0.554
<i>Q21</i>	0.668	0.671
<i>Q4</i>	0.451	0.379
<i>Q2</i>	0.126	0.263
<i>Q3</i>	0.197	0.181
<i>Q11</i>	0.283	0.200
<i>Q9</i>	0.331	0.305
<i>Q7</i>	0.346	0.391
<i>Q12</i>	0.251	0.752
<i>Q23</i>	0.670	0.601
<i>Q24</i>	0.513	0.371
<i>Q25</i>	0.375	0.336
<i>Q19</i>	0.268	0.256

Source: JASP software (version 0.7.1)

Considering our Global model (Figure 2) results during the previous analysis, we could determine the coefficient of determination (R^2) in which it was possible to predict the outcomes of our research. Due to the proximity of some results in R^2 (Table 9) we've only work with the higher values of each variable.

In that sense, middle management exhibits the strongest adherence to Factor four. It is suggested that the inclusion of several members in strategic planning can increase competitiveness, creating more opportunities for everyone. However, that is only possible while fostering positive interactions among all members in the organization leading to greater effectiveness when

compared to managers that nurture a more distant relationship. As the world evolves there is the need to adapt planning to new adventures, turning it into a more refined and closer to reality. The results also suggested that environmental sustainability has become a needed topic, and its guidelines should be included in strategic planning which contributes to higher indices of retention and adds value to organizations. Additionally, middle managers also believe that to attract the new generation, organizations should outline more environmentally friendly messages preserving organizational sustainability and becoming an example of top management behavior is a contributing factor to retain and the intention to apply strategic planning.

In Factor three, the perks (payment, work-life balance, etc.), are a necessary condition to retain middle managers in the organization and we also notice that most people in our sample has higher degree, creating more opportunities in the marketplace and making these managers happier with their career path. Lower management considered that specific training is necessary to increase performance and that the organization needs to be aware of that and provide it for employees to have more tools to do their work. As a result, this will increase performance and satisfaction while working as a team and achieve their professional goals and change their mindset for personal achievement.

Regarding Factor two, middle management agrees that there is significance in strategic planning, and it should be continuously communicated to the superiors for strategy update. This should be integrated with diverse perspectives to enhance an understanding of what is happening in the organization and how to make it more effective, it is joint work in which needs the employee's collaboration leading to company improvement and better results. Additionally, Lower management considers that the guidelines of planning should be communicated to employees so they could understand what was required to improve the organization to a more effective work, also, to increase proficiency it is required that processes become less bureaucratic in the overall organization.

In Factor one, Middle management thinks that it is necessary to encourage employees to share their knowledge and expertise, adding into strategic planning resulting in a more competitive force. During our research, we could understand that most middle managers felt that if they work hard for the growth of the organization, they're highly appreciated for their work and initiatives and see themselves working in their organization for another year. Also, due to the nature of their job we discovered that they are in constant renovation of their skills.

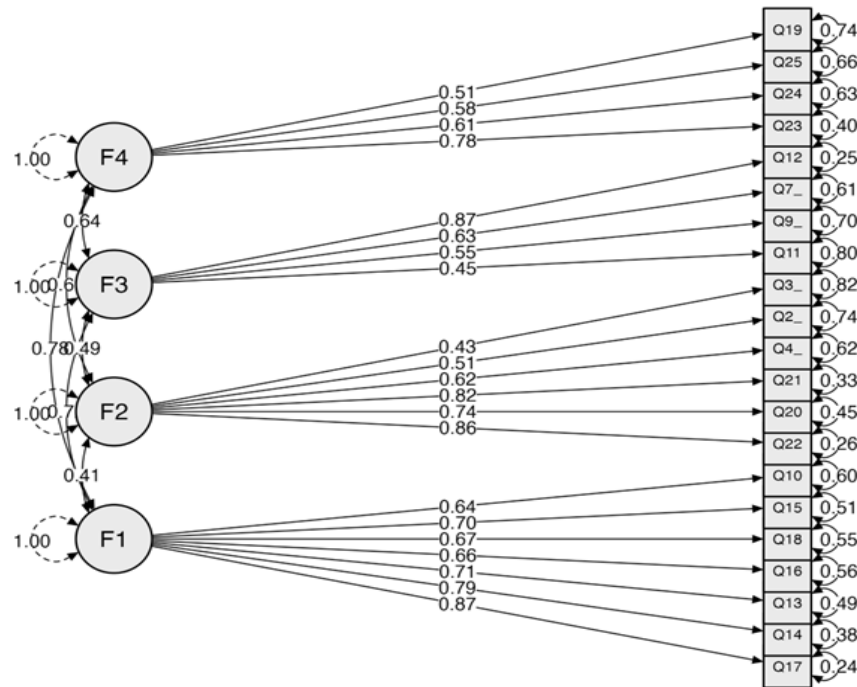
To promote employee growth and career advancement, it is essential for Lower-level management workers to have opportunities to advance within the organization. Middle managers can facilitate this by actively listening to their colleagues and valuing their feedback. Additionally, the top management level should encourage employees to acquire new skills and knowledge by offering training opportunities, which can pave the way for them to contribute to strategic planning and have their opinions considered.

Figure 3: Middle management



Source: JASP software (version 0.7.1)

Figure 4: Lower management



Source: JASP software (version 0.7.1.)

5. Discussion and Conclusions

To help organizations unlock success in the use of strategic planning, we focus our research on the three management levels, particularly in the context of resistance to change and situations that can affect talent retention and loyalty. In that regard, the key findings of our study are discussed as follows. First, the findings from top management indicate that employees should provide frequent feedback on ongoing development and implementation of programs, identifying the improved areas, making a rigorous assessment of performance, understanding the viewpoint of every stakeholder, and reporting financially, socially, and environmentally level (Bossink, 2002).

This feedback should be accompanied by continuous training to facilitate the development of new workflow strategies and provide opportunities for personal development. To reinforce professionalism, it is necessary that lower management engage in mental exercises that explore future possibilities, workplace changes, and accomplishments in order to understand how they can

contribute to the organization. However, for this exercise to be effective, sometimes employees need to brief and enlighten about financial and overall status.

A 360° assessment can serve as a tool to enable communication eliminating false interpretations or decisions, particularly in international teams where language and cultural diversity can be challenging. In today's digital world, each department bears the responsibility to evolving and aligning their understanding with the company priorities and a roadmap that identifies the technology initiatives that will support those priorities.

Throughout our research we observed that there was a consensus among managers that the most significant disruptions arise in leadership changes, staffing, or resources availability. These can result in long delays in strategic planning or render plans obsolete soon after their inception. If teams are slow to adopt the plan, it will become outdated and irrelevant to everyday processes and priorities.

Resistance to change in management is considered a serious key topic in management (Fuentes, 2003) of which top management needs to be addressed. To overcome this resistance, managers believe it is crucial to focus on communication as a foundation for bridge the gap. Additional solutions include helping employees understand the reasons for the change, the expected benefits, and the implemented process. Senior employees can be consulted, and visual aids can be provided to demonstrate the results or incremental changes over time. Furthermore, seeking the opinions, knowledge, and expertise of workers in a particular situation can foster an environment that values diversity and inclusivity, encourages open communication and collaboration, and provides opportunities for team building and skill development.

As mentioned by Cachón-Rodríguez (2021) and Book (2019), there is a significant value in employee loyalty and in retention as an intention to carry on company activities, both levels of management (Top and middle management) agree that by offering better salaries, participation in the organization employees should have a better work-life balance, new positions with new challenges, reward performance, on-the-job training, mentoring, workshops, and courses. But, to achieve these benefits it is required for these employees to have a good-track record, be knowledgeable, motivated, help in the development of new programs, and be open for continuous training/education for more opportunities in the marketplace

For middle managers, strategic planning needs also to have a sustainable component in which have the goal is to create awareness through top management in which they see value in

environmental policies and attract new generational members. During the time employees grown and had not become passive performers, this requires for processes to be less bureaucratic George (2017) for higher worker commitment and the realization that executives need to see higher state of involvement of the remaining levels before start to accept any advice, changes or updates on planning.

In conclusion, this study highlights the importance of incorporating factors like training, certification, communication, and sustainability into strategic planning. To prioritize Employee engagement (F1), Organizational development (F2), Employee motivation (F3), and Sustainable inclusion. By focusing on these aspects management can foster a positive work environmental and enhance overall organizational performance.

Furthermore, internal stakeholders need to recognize the impact of their actions in the organization. It becomes imperative for them to proactively identify certain parameters, address the issues that could create new gaps or pitfalls, and reduce resistance to learning/training. By embracing these approaches, it is possible to be one step closer to the success of the organization and drive positive outcomes.

Recommendations

The purpose of these recommendations is to provide some guidelines for organization members and promote a standard blueprint of what should be introduced in the organization. Under no circumstance should these guidelines be seen as a (Bjorck, 2017) obligation or a demand for managers or coworkers.

On Job-formation – The training and development of professionals must be inserted within the culture organization, although sometimes it is necessary to go outside and bring new knowledge. Nevertheless, organization professionals need to be certified in their designated area to give training to coworkers/colleagues. Reflecting this point in strategic planning and gradually, associating it with the annual training plan will reduce costs, given the opportunity to coworkers ask questions and understand possible transformations in the organization motivating teamwork and exchange of opinions.

Programs for growth and performance evaluation – The objective of these programs is to enhance knowledge sharing and foster experiential learning among employees, leading to the

establishment of effective evaluation methods. Through this exercise, employees will undergo tests and face situations directly to their work in order to assess their responses and identify areas for improvement. Gamification tools will be employed to facilitate the learning process for both top, middle, and lower management, enabling them to exchange roles and experiences, thus fostering a two-way learning experience. This approach allows each party to gain a comprehensive understanding of the challenges and perspectives of the other.

Benefits Package – Nowadays, organizations must design a comprehensive benefits package that increase motivation, retention, and loyalty. Based on our data, employees prioritize certain elements in their interests. Firstly, they desire salary revisions as a reward for their performance. Additionally, they value the emotional salary that cater to their personal needs. Furthermore, they seek opportunities to actively participate in the organization, particularly those who consistently make extra efforts. They also appreciate access to a variety of workshops that promote mentoring and skill development for all employees. To ensure the realization of these benefits, candidates should possess a solid track record, relevant expertise, motivation, and a willingness to contribute to the development of new programs.

Sustainability – The use of a sustainable certification to provide a trustworthy was to demonstrate the organization commitment to sustainability. By obtaining this certification from a recognized third-party, it is possible to validate their sustainability claim and build trust with consumers, investors, and other stakeholders. Additionally, it is a way of obtaining higher revenues.

6. Theoretical and Practical Implications

This study contributes to enhancing relations between management levels within organizations, promoting a more sustainable environment, integrating strategic planning, and providing better solutions for the retention by involving top management and pro-environmental behavior. Although each organization and nation as a different working methodology, culture, work setting, and tradition. It is important to delve into future investigations comparing the working format between countries and sectors. Our results reinforce the need for faster processes,

communication-enhancing tools, higher learning curve, and technology to increase decision-making.

Strategic planning should include talent retention parameters as a crucial aspect, particularly focusing on high-performance workers who meet the necessary criteria. Invest in these employees creates opportunities for developing the next generation of managers. Creating a sustainable environment should remain a priority to all stakeholders, with everyone contributing to reduction of carbon footprint and fostering a greener organization through sustainable actions. Managers should also prioritize providing the necessary training and development opportunities to address sustainable actions, gain experience, expand their knowledge in their respective fields, and bridge any daily operational gaps to ensure smooth functioning.

7. Limitations and Future Research Implications

The study has limitations which may affect the extrapolation of the data, since they only be applied to the sample studied. It was not possible to apply questionnaires to top management due to their schedule and we need to continuously adjust to their calendar. In future, experimental studies can be made in order to check if there is progress regarding the application of new variables of strategic planning in the organizations and what are the results encountered.

The future research studies can include evaluating other relevant theoretical frameworks and other areas of study, for example gamification which can be applied scenarios for employees to answer and see how they can delt with the situation and executives/top management in the application of their designed strategy and the effects in the organization. The recovery and failure of stakeholders' actions and what are the impacts that can have internally and externally.

Informed Consent Statement

Informed consent was obtained from all subjects involved in the study.

Data availability statement

Not applicable.

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Conflict of Interest

The authors declare no conflict of interest.

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Paper contributions to our research agenda

During this research we worked on five studies that helped us to understand the path of strategic planning, giving contributions to science and retrieved conclusions to answer our central question: “*How can the strategic planning process be improved to increase effectiveness?*”. The first study was a literature review with the purpose to understand what are the pitfalls that need to be worked on planning. The results present four pitfalls inherent to strategic planning that are applied in today’s context: (1) Complexity of processes, (2) People unwillingness to change, (3) The data misreading, and (4) Strict hierarchy model.

The second study, it was implied top management as the source of strategy and its effect on the organization. The results show that if employees have a proficient attitude regarding their organization, top management can work with them and let them participate in strategic planning, as they can be seen as an added value. The positive relations between the levels can be a factor that helps all to work towards the objectives creating more opportunities for all involved. Other factors to consider are the seven perspectives that enhance planning leading to another level. Lastly, identifying several scenarios from management levels resulted in improved outcomes. Furthermore, through dynamic capabilities theory, it is necessary to use/have technology that helps workers receive real-time information avoiding misinformation and impaired decision-making.

The third study considers the necessary changes that managers need to make to adapt to a new context. Several issues were identified, which required multiple changes to enhance the competitive advantage process. It was necessary to adapt to remote work through digital tools, allowing for real-time supporting communication, disengagement, and work-life balance. Employee disengagement was an important subject that could lead to reduced productivity and limited interaction, creating difficulties within the organization. In this regard, we identify three dimensions that managers should work to increase efficiency: (1) the daily tasks, (2) soft skills, and (3).

In the fourth study, the implication of environmental sustainability as a reinforce to strategic planning and the retention of the workforce. The findings point out for higher commitment from the organization better motivation to stay and pro-environmental and top management behavior will contribute to its intention to apply it. It was noticeable that providing environmental education/training and encouraging employees to share knowledge and best

practices will lead to a better environmental corporate culture and performance in opposition that those that do not. This leads to a reflection on the corporation's behavior regarding their efforts to increase sustainability in their daily operations or long-term strategic planning, in practice, the spent will always be a huge factor to consider and any action towards that kind of activity will take resources and severe changes in employee habits.

The fifth and last study "*Improving Strategic Planning: The Crucial Role of Enhancing Relationships Between Management Levels*", has the purpose of validating the previous studies and add new contributions for the structuring of strategic planning. Considering this information, our aim is to examine how the relationship between management levels can disrupt strategic planning, particularly in contexts of resistance to change, situations that can even affect talent retention and loyalty.

The goal of this final independent study is to validate the previous studies and understand whether the findings are valid or if any information has been overlooked. The data for our study was collected in two stages. The First stage involves the application of a qualitative method (interviews) to top management, executives, strategists, administrators, and CEOs. The second stage is proceeded by a quantitative data collection (questionnaires) focused on middle and lower management. The key findings suggest that feedback on ongoing development and implementation of programs is necessary to address the gaps, identify areas for improvement, assess employee performance rigorously, consider the perspectives of internal stakeholder in strategic planning, and report at a social, financial, and environmental level.

Sixth chapter: Technological Study

Quantitative methodology

AI Integration and Strategic Planning: Fostering Inclusivity and Strategic Evolution in the Workplace

Gandrita, D. M., & Rosado, D. P. (2024). AI Integration and Strategic Planning: Fostering Inclusivity and Strategic Evolution in the Workplace. *Submitted to Thunderbird International Business Review* with manuscript ID TIBR-24-038

Associated question:

How does the integration of AI technologies impact the development of new strategies within the context of effective strategic planning and management relationships?

Highlights:

- AI used as a tool to boost motivation;
- The workforce contribution to embrace a new culture;
- The benefits for AI to navigate crisis providing a sustainable strategy.

AI Integration and Strategic Planning: Fostering Inclusivity and Strategic Evolution in the Workplace

Abstract

This research delves into the symbiotic connection among effective strategic planning, management relationships, and the integration of artificial intelligence (AI). Utilizing a structural equation modeling approach in a quantitative research methodology, we collected responses from $n=360$ participants. Additionally, we conduct a bibliometric analysis focused on AI and the strategic planning process. The resulting framework underscores the evolution and adoption of AI for the use of strategic planning mediating the connection between new strategies, especially in contexts of resistance to change. Our study addresses addressing potential disruptions affecting talent retention and loyalty. The findings reveal that AI serves as a tool for organizations to align their efforts and boost employee motivation. Employees who actively contribute and believe in this technology tend to embrace a culture of innovation more readily. Moreover, they become more resilient, playing a crucial role in supporting strategic planning efforts, thereby providing beneficial for navigating crises and uncovering sustainable strategies. Implications related to theory and practical are discussed.

Keywords: Strategic planning, Relationship Building, Workplace inclusivity, Organizational performance, Management support, Artificial Intelligence,

1. Introduction

In the evolving landscape of modern workplaces, integrating artificial intelligence (AI) technologies has emerged as a pivotal factor in reshaping organizational strategies and management practices. This approach led organizations to change their business models, bringing new challenges to the established markets, new opportunities, and revolutionizing (Bharadwaj, 2013; Ferreras-Méndez, 2021; Schneider, 2023) perceptions about the synergy between

technology, human interaction, and the design of strategic planning. As the use of AI becomes more prevalent, organizations undergo a more internal dynamic transformation (Chin et al., 2019) that consequently changes several aspects of how the organizations work and the effects on management relations. Although this technology is a step in the right direction and a synonym of evolution, it causes uncertainty about the employment of workers beginning to be one of the elements to consider in the workplace (Costello, 2007), especially in areas that require data management and analysis, individual evaluative interaction, repetitive motion, and repeated physical control of equipment (Chung, 2020). However, this technology presents some limitations that indirectly influence the development of modified, new, and unmodified routines at all levels of the organization (Giudice et al., 2021). As a result of the application of AI, managers must proactively prepare their strategies and/or strategic planning adapt them to these transformative changes (Ledro, 2023). Adopting and being successful with the implementation of AI technologies and developing suitable strategies, preventing potential pitfalls and fostering AI adoption within the organizations (Clohessy, 2019) requires understanding what the impact is and how to can be developed new strategies within the organizational context. In that sense, the following central question was outlined:

RQ: *How integrating AI technologies impact the development of new strategies within the context of effective strategic planning and management relationships?*

Considering the challenges encountered in strategic planning and management relationships, our study is contributing mainly in four ways: i) we seek to advance the literature on these topics by examining the integration of AI technology and its impact while developing new strategies in which there is a necessity to make changes and new adaptations in the workplace increasing competitiveness in the process, ii) analyzing the evidence through SPSS software, iii) acquiring insights for international business harnessing the power of AI, and ix) continuing to scale strategic planning process enhancing its use. To alleviate the shortcomings identified in the literature review (Hilmersson, 2020), were developed six hypotheses about artificial intelligence (Li, 2022), strategic planning, and management support. These variables were tested using a dataset of $n=360$ participants with a two-step procedure (Fayaz, 2022) and two multivariate data analysis techniques. The rest of the paper has the following structure. First, it is developed theoretical background and hypothesis development. Second, it describes the research methodology used for

bibliometric analysis. Third, the acquired data and results are presented according to the answers given from the participants. Fourth, the research findings validate the hypothesis provided. Fifth, the discussion and conclusion are presented, providing answers and insights for this study. Lastly, the presentation of theoretical and practical implications, limitations, and future research.

2. Theoretical Background and Hypothesis Development

2.1. AI Integration & Management

Artificial intelligence (AI) refers to a collection of technologies encompassing machine-based systems designed for effective enterprise automation and influential decisions. Through the application of AI, businesses have the potential to gain a competitive advantage in the market (Ameye, 2023). Nevertheless, this transformative technology presents unique challenges for managers and researchers, especially in the realm of digital integration within organizations (Furman, 2019). Considering this situation, Nasiri et al. (2020) point out the fact that organizations lacking digital talents or employees who are good at resolving can be prepared enough to deal with the needs that AI presents, facing major issues in the development of new business models or business processes. In this context, the resistance to change can lead to low motivation in employees becoming a constant issue, causing these individuals to be lack confidence in their efforts and valued outcomes (LePine, 2005) and start to see and consider AI a threat to the maintenance of their jobs. Given that AI is in constant change and evolving at high speed, agility becomes a prerequisite to harness the power of artificial intelligence, with that, companies often fail for not being fast enough to innovate and extract the benefits of this technology (Borins, 2001). While there are some recognizable challenges between AI and management, continuous collaboration is essential driving innovative strategies, in this context, Tirumala and Tiwari (2020) propose applying higher levels of resource to support these strategies. This approach aligns with the notion of fostering innovation, education, skill development, and resource efficiency, necessitating investments in human capital. This adds significant value and contributes to employee loyalty and retention (Cachón-Rodríguez, 2021; Book, 2019). In light of these considerations, there is the need to contribute to the formalization of strategic planning. This contribution aims to develop strategies that serve as a guideline for the organization and society at large (Krier, 2022; Weston, 2022). In that sense, our first hypothesis is outlined as follows:

H1: *AI integration and strong management relationships drive innovative strategies in the organization's strategic planning process.*

2.2. Organizational Adaptability & Dynamic Markets

One of the foremost challenges facing managers and leaders today is enabling and positioning organizations and people for adaptability in the face of increasingly demanding, challenging, and dynamic environments (Uhl-Bien, 2018). The premise of organizational adaptability is needed and considered an important topic that has been addressed in a variety of literature across a range of fields (O'Reilly, 2008). Birkinshaw and Gibson (2004) define organizational adaptability as the capacity to swiftly pursue new opportunities, avoid complacency, and adjust to new markets. In the context of this study, the adaptive process (March, 1991) relies on the transformation that comes from new knowledge innovation, information, and learning (Bien, 2018) encompassing artificial intelligence as the system that identifies, interprets, learns from data, and makes inferences to foster innovation and productivity (Broekhuizen, 2023). This technology, currently in advanced development, holds significant promise with potential applications across a wide range of functions and industries. While it presents opportunities for new job creation and increased productivity, it also raises concerns about job displacement and cost reduction (Acemoglu, 2019). Therefore, fostering relations that encompass access, positivity, openness, assurances, sharing tasks, and networking is essential for enhancing adaptability and developing new strategies (Steenkamp, 2023) in the market landscape. The approach to building these relations should involve implementation lean and agile strategies. This includes investing in task enablers and aligning actions sustainable business strategic levels (Wichaisri, 2017). Considering this, the following hypothesis (H2) was formulated

H2: *AI integration with strong management relationships enhances organizational adaptability enabling agile strategies and a competitive edge in dynamic markets.*

2.3. Organizational Resilience & Sustainable Strategies

Derived from the Latin *resilire*, “resilience” means recover from or bounce back from a disturbance (Hollnagel et al., 2006), The concept refers to a system’s capacity to withstand and survive disturbances with minimal effects on the stability and functioning of a company (Williams, 2017). The organization and its environment are inevitably shaped by the nature of the behavior and the disturbance of the actors involved (Nadasde, 2007). This process unfolds through the actions of organizational actors when they respond to an exogenous shock and gain new insights that feedback on their ongoing efforts. It reflects an assumption about organizations constantly evolving and that stability can change suddenly and become profoundly different than before (Davoudi, 0212). Organizational resilience refers to the capacity to survive, grow, and adapt in the face of changes and can be defined as the maintenance of positive adjustment under challenging conditions such that the organization emerges from those conditions more resourceful and strengthened (Yogmur, 2023). The process conceptualizes four dimensions: Robustness, Resourcefulness, Redundancy, and Rapidity. Robustness refers to the ability to withstand a certain level of stress without suffering loss of function or degradation, resourcefulness points to the capacity to identify priorities and mobilize resources, redundancy refers to the extent to which elements exist that are substitutable and capable of satisfying functional requirements, and for last, rapidity refers to the capacity of achieving goals and to meet priorities (Bruneau, 2003; Kantur, 2012). In the discussed context (organizational resilience), AI presents itself as an enhancer of productivity with three mechanisms that help managers discover new business opportunities. First, the ability to liberate workers from repetitive tasks and enable them to perform more productive and new tasks (Bryjolfsson, 2021). The second is the reduction of error and bias that often accompany human judgment (Gulshan, 2016), and the third, is the processing of complex and large datasets, providing a way to solve problems and bring new business opportunities (Singh, 2017). Furthermore, the combination and right application of AI with management relations can aid in crisis and lead to the uncovering of sustainable strategies that can aid in the maintenance of competitive edge (Aytekin, 2022). These strategies can be identified as collaboration with other actors, offering incentives to employees for achieving sustainability results, integrating of sustainable practices into strategic planning, and conducting studies on how sustainable strategies can influence organizational performance (Hermundsdotti, 2022). Utilization of these strategies, along with the opportunities developed and resources gained, enables organizations to enhance resilience among internal stakeholders while maintaining the equilibrium between strengthening

social, economic, and environmental factors (Guan, 2023). Thus, considering the context, the outlined hypothesis is as follows:

H3: *AI integration, combined with robust management relationships, promotes organizational resilience, aiding in crisis navigation and the development of sustainable strategies.*

2.4. Innovative Culture and Organizational Growth

Organizational culture refers to the beliefs, values, and norms that dictate expected employee behaviors (Nguyen, 2023). Normally, this is largely shaped by organizational leaders and culture has consequential effects on the company's performance (O'Reily, 2014). Although Ogbonna (2000) considered that organizational culture is one of the more popular concepts in organizational theory and management, it is also defined by a set of beliefs, norms, and values expressed, that are shared with internal stakeholders (Giberson, 2009). Also, it represents an unwritten, effective part of the company, where failure and success depend on the philosophy of each leaders' beliefs and attitudes toward the organization's opportunities and constraints. (Nguyen, 2023). In this context, AI is referred to as the technology that usually stimulates human intelligence, including cognition, perception, decision-making, and action (Davenport, 2018). This technology (AI) aims to innovate and integrate the digital environments to improve effectiveness and work efficiency (Daugherty, 2018). Regarding employee engagement, management relations focus on the interconnection between employees and employers, fostering an innovative culture. This, in turn, is reported to enhance the implementation and creation of new ideas and working methods in organizations (Caldewell, 2003). The process can be measured by the characteristics of the participants (age, gender, education), team effectiveness, and organizational support (Cramm, 2013). Kaluarachchi (2021) and Grote (2022) stated that humans have a good innovative ability to generate data, knowledge, information, and materials. The collaboration between these two agents (AI and management relations) demonstrates the existence of strengths and weaknesses (Table 3) in their ability to perform job tasks creating impediments to the design of strategies or planning. Nevertheless, these agents show strong complementarity into their ability to handle knowledge-intensive tasks and some studies have shown that after being integrated in the organization the cooperation to jointly execute, determine, and coordinate work tasks will possibly create a new

human-AI hybrid intelligent team mode (Sarker, 2019; Vossing et al., 2022). The following hypothesis reflects this framework:

H4: *AI integration and supportive management relationships foster an innovative culture, driving creative strategies for continuous organizational growth.*

H5: *Collaborative management facilitates seamless AI implementation, optimizing resources and enhancing organizational performance.*

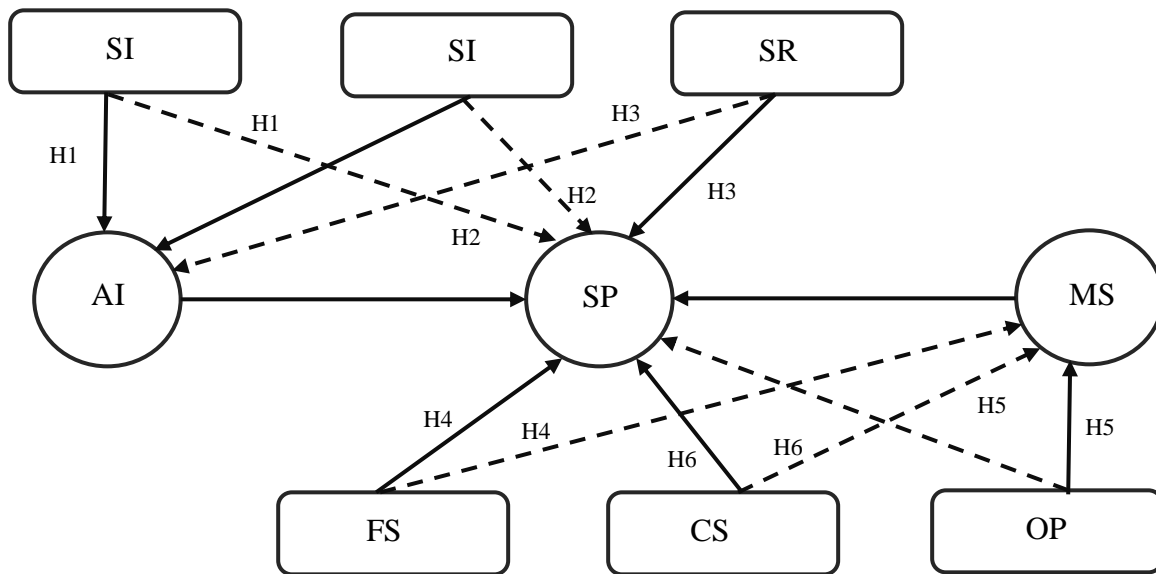
2.5. Strategic Initiatives for Collective Success

The use of AI technology is becoming more frequent and widely adopted in organizations because it creates value for employees and is expected to facilitate their career lives (Chowdhury, 2023). This induction into companies has become a critical factor for the strategic planning process which defines strategies or directions to achieve a goal and decides how to apply them (Amirshenava, 2022). Nevertheless, it becomes necessary that this action plan is intentionally designed to guide and motivate individuals or groups towards a specific goal and remember the importance of setting personal purposes as a motivational driving force for the increase of effectiveness (Latham, 1991; Prentice, 2023). Considering this, leaders need to have the reduction of divergences and information asymmetry between the organization and employees as a primary goal (Triest, 2023). It requires managers to enable a control approach allowing flexibility, adaptability, and information sharing to help employees deal with certain contingencies and uncertainties (Otley, 2012). This reduction will contribute to the increase in management perception, especially for employees, because their behavior is based on perceptions of the control practices that, ultimately, affect the outcomes and job performance (Franco-Santos, 2012). Although there is a consensus among employees (Tessier, 2012) that AI has come to replace their jobs, it is needed to involve everyone in the organizational process for the development of strategic initiatives (Koren, 2018; Bhattacharyya, 2019) In that sense, the following hypothesis was determined:

H6: *Thrust-based management relationships, coupled with AI integration, cultivate a positive organizational culture with AI and align employee goals with strategic initiatives for collective success.*

Utilizing the theoretical framework and hypothesis development, the model (Figure 1) intricately illustrates each hypothesis and the corresponding connections that interlink them. Positioned at the center, the model delineates variables tethered to the primary focus of the study, specifically associated with strategic planning. On the left side: synergic innovation, strategic innovation, and sustainable resilience are interconnected with artificial intelligence, strategic planning, and management support. Conversely, on the right side, fostering growth, collective success, and organizational performance are linked to strategic planning and management support.

Figure 1. Hypothesis development. Source: Own elaboration.



Source: Authors Own Work

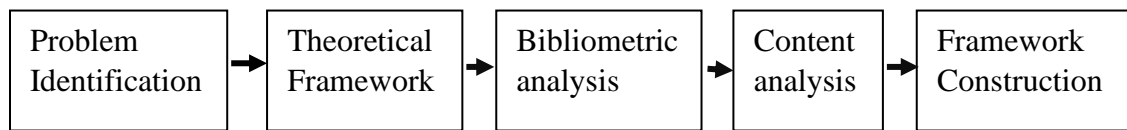
Legend: (Left side) SI: Synergetic Innovation (H1); CSP: Strategic Innovation (H2); SR: Sustainable Resilience (H3); Middle) AI: Artificial Intelligence; SP: Strategic Planning; MS: Management Support; (Right side); FS: Fostering Growth (H4); CS: Collective Success (H6); OP: Organizational Performance (H5).

3. Research Methodology

To comprehensively grasp the nuances of this study, a meticulous bibliometric statistical analysis of research papers will be conducted. This method has been employed to facilitate authors in elucidating their process and assist readers in comprehending each step taken. By employing this

approach, the study aims to offer a clear and transparent account of its methodology, ensuring thorough explanation at every stage for the accessibility of both authors and readers. In that sense, an enhanced systematic literature review on strategic planning, artificial intelligence (AI), and management relationships was synthesized and reviewed to find answers to the research questions (Gupta, 2023). Through the acquired results and literature, it will be possible to triangulate data and add contributions to the existing literature framework. The bibliometric analysis is based on five stages – Table 1 (problem definition, theoretical framework, bibliometric analysis, content analysis, and framework construction) which helped identify specific indexed research papers related to this study.

Table 1. Process model of systematic literature review



Source: Own elaboration.

The trajectory of the collected data enables the gathering of several citations, journals/authors, and keyword analysis. Research papers indexed to Scopus (Burnham, 200; Paramba, 2023) were obtained through databases like Science Direct and Web of Science by searching for terms such as “Strategic planning”, “Relationship Building”, “Artificial Intelligence”, “Workplace inclusivity”, “Organizational performance”, and “Management support”. The terms used were separated by the database axes using a Boolean operator “AND” (to make the search connections) and “OR” for the returns of alternative or synonym terms in those same axes (Rosado, 2023). The bibliometric analysis encompassed research papers (Ratten, 2019) spanning the period from 1991 to 2023, with the search for these papers being carried out in October 2023.

The initial search is related to the keywords: “Strategic Planning” AND “Artificial Intelligence” AND “Workplace Inclusivity” OR “Management Support” AND “Relationship Building” AND “Organizational performance”, giving us a total of 1,044 results. Refining the search by “Management” and “Business” we have reached a total of 702 results. The refinement by documents (articles) gives a total of 644 results. With English being the chosen language, the number of articles found was 641. Filtered by publication titles (Table 2) it yields 311 results.

Table 2. Publication titles

Nº	Journal	Total
1	<i>Journal of Business Research</i>	75
2	<i>Journal of Organizational Behavior</i>	50
3	<i>International Journal of Human Resource Management</i>	46
4	<i>Journal of Management</i>	40
5	<i>Journal of Knowledge Management</i>	31
6	<i>MIS Quarterly</i>	4
7	<i>Management Decision</i>	23
8	<i>Administrative Sciences</i>	3
9	<i>IEEE Transactions of Engineering Management</i>	17
10	<i>Technovation</i>	11
11	<i>Thunderbird International Business Review</i>	3
Total		311

Source. Web of Science.

After the first stage is passed. The second stage of our bibliometric analysis includes the selection of the papers by reading the titles and abstracts and verifying any relation to our study. In this process, all the research papers and those that have a direct relation to the study are reviewed, preparing the final process. After the selection was finished, the final pull of papers gives a total of 151 results. In terms of the selection format, a snowball method was employed. Consequently, the authors and studies contribute continuously to the discussion and the development of the areas of study. To address our central question, we cataloged the papers on the aspects related to AI, strategic planning, and management support. These papers were eligible for bibliometric analysis, content analysis, and framework (Silva, 2022).

3.1. Inclusion and Exclusion Criteria

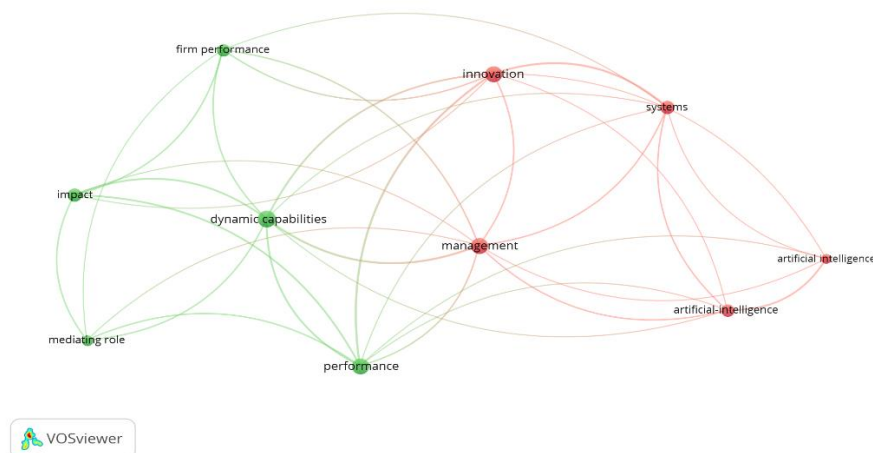
In this research, peer-reviewed journals were considered the primary source of knowledge. The focus of inclusions is to select the keywords and search databases, excluding theses, white papers, books, and blogs. The exclusion criteria rejected several articles that did not provide any contribution direct or had practical application/theoretical information that did not align with our research. Considering this, the following were ruled out:

- Ex.1 articles focus on medical research.
- Ex.2 Articles focus on programming.
- Ex.3 Articles with a specific relation to corporative social responsibility.
- Ex. 4 Articles with relation to tourism.

3.2. Co-Occurrence of Keywords

The generated visualization map (Figure 2) displays the keywords analysis (Bukar, 2023) constructed from the final set of 151 papers pulled using a full counting. The construction was performed using VOSviewer software (Version 1.6.17) to understand clusters, network strength, and links. Figure 2 presents the structure of the bibliometric network with a full count, revealing two clusters, each containing a total of 5 items, and an overall link strength of 130.

Figure 2: Keyword analysis. Source: VOSviewer software Version 1.6.17



4. Data and Sample

For this study, quantitative methodology research was applied. The survey starts with a brief introduction to the study, the participants are advised to respond sincerely and honestly, considering that there are no right or wrong answers and that the confidentiality of the questionnaire is guaranteed. To create this survey, Google Forms was used, and the link was shared on several social networks, such as LinkedIn, WhatsApp, Email, and Facebook between October 2023 and November 2023.

This questionnaire consists of two parts, first comprised demographic features, including age, gender, academic position, and country. The second part of our study includes the measurement of six constructs, namely Innovative planning (IP), Creative Strategic Planning (CSP), Continuous Innovative Growth (CIG), Artificial Intelligence (AI), Strategic Planning (SP), Management Support (MS), Fostering Growth (FS), Collective Success (CS), Organizational Performance (OP). To facilitate score interpretation, the study uses a Likert Scale survey (Yamashita, 2022) to validate the questions presented with a five-point response scale (1—Totally Disagree; 2—Somewhat Disagree; 3—Neither Agree nor Disagree; 4—Somewhat Agree; 5— Totally Agree).

4.1. Sample Characterization

The applied questionnaire obtained the number of participants ($n=360$). By analyzing the statistical results in the sociodemographic data, it was possible to observe characteristics of a population, such as gender, age, country, education, work setting, and company size. Considering this information, the presented data shows that 60% were Female and 40% were Male. The modal Age class was 18-25 (6,7%), between 26-35 (35,0%), from 36-45 (36,7%), from 46-55 (18,0%), from 56-65 (1,70%), and Over 65 (1,70%) The Countries (population from Europe and U.K.) with higher rate are France (26,7%) and Spain (15,0%), Austria and Germany with the same rate (8,30%). Portugal and Netherlands with 6,70%, Greece with 5,0%, Estonia, Italy, and Switzerland with 3,0%. The remaining countries (Poland, Norway, Iceland, Hungary, Belgium, and Lithuania) have 6% each. Concerning academic qualifications, 26,7% of the participants are in secondary, 48,0% have a bachelor's degree, 16,7% have a Master degree, 3,30% have a Ph.D., and Other*

(Technical School). In the Company Setting, 45,0% are Public, 45,0% are Private, and Other* have 10,0%. Lastly, the Company Size shows that 40,0% are below 500 workers, 25,0% are between 501-999, and 35% are higher than 1000 workers.

4.2. Data Analysis Procedure

The questionnaire was adapted in two languages (English and Portuguese) for participants' better comprehension and also sent to 08 persons with an extensive background in Artificial intelligence (AI), Strategic planning (SP), and Management relations (MR) to evaluate the level of comprehension of each item/question. Considering the sample size ($n=360$), the study proceeds to test/assess, validate, and measure the constructs/variables under study in order. For this procedure the SPSS IBM statistics (version 28.9) software is going to be used to introduce a two-step procedure (Fayaz, 2022) and two multivariate data analysis techniques: Principal Components Analysis (PCA) followed by a multiple linear regression analysis. The beginning of this process starts with assessing internal consistency of the answers, through Cronbach's alpha, followed by the application of the PCA, and then validation of the appropriateness through the technique Kaiser-Meyer-Olkin (KMO) and Bartlett's sphericity tests. By doing this, the measurement model assesses the validity and reliability of the used sample it is possible to test the adequacy of the technique. Second, the structure models are managed to measure the relationship between the variables and test each of the hypotheses. The techniques were chosen due to the sample size and the need to establish the validity and reliability of the measurement instruments.

4.3. Crosspoint Variables Analysis

After the testing and validation of the hypothesis, it becomes necessary to identify the strengths and weaknesses of our variables. This process enhances our argument and draws attention to the similarities between AI, SP, and IMR that may be relevant to the organization, contribute to our discussion, as well to understand potential pitfalls. Nevertheless, the authors that highlight Strengths of each area (Abbass, 2019; Jarrahi, 2018; Wuand, 2020; Sartas, 2021; Wegner, 1995; Daugherty, 2018; Davenport, 2016) and Weaknesses (Davenport, 2016; Simon, 2020; Schultz,

2007; Cheng et al., 2022; Silva, 2017; Khanin, 2020; Turel, 2020; Lee, 2013; Munõz, 2018; Boyne, 2010).

Table 3. Strengths and weaknesses

Item	Artificial Intelligence (AI)	Management Relations (MR)	Strategic planning (SP)
Strengths	<p>Good at efficient processing and analysis of large amounts of data and information (Abbass, 2019). High consistency and efficiency in handling daily, repetitive routine work, don't let it be affected by emotion or fatigue (Sartas, 2021). Ability to replicate knowledge fast between several AI agents (Wegner, 1995).</p>	<p>Complex decision-making with high uncertainty and ambiguity (Jarrahi, 2018). Dealing with the unknown and emergencies (Wuand, 2020). The capability to lead, take initiative, and adjust to teamwork (Daugherty, 2018). Propose new approaches to the problems, strong communication, and social skills (Zheng, 2023).</p>	<p>The ability to make activities more clearer translating strategy into shorter-term goals (Munõz, 2018, Boyne, 2010). Involvement of stakeholders into SP process and the successful implementation of strategic decisions (Lee, 2013).</p>
	Weaknesses	<p>Don't have the ability to deal with complex decision-making (Zheng, 2023); insufficiencies in the creation of new knowledge and creative work (Simon, 2020); Not managing and leading</p>	<p>Low efficiency in handling routine work; Emotion and fatigue influence in the presence of continuous work; Limited energy, limited knowledge storage capacity,</p>

teams; lack of flexibility incapability to copy or
 (Schultz, 2007); Lack of download existing
 communication skills knowledge (Zheng,
 (Cheng et al., 2022). 2023).

Source. Own elaboration

5. Preliminary Results

The summary statistics are given (Ede, 2023) at Table 4. The factors derived from the application of Principal Component Analysis (PCA), validating in general the adopted theoretical model. It is inferred that the retained factor (obtained through the PCA method followed by varimax rotation) exhibits high factor weights for all items, except employee integration (0,457), innovation sustainment (0,441), relation influence (0,357), and thrust (0, 479), which are values (Bryant, 1995). These values explain the 277,446 percent of total variance (considered satisfactory by (Marôco, 2018). Furthermore, the eigenvalues of the six major components (PCA) have explained variances of 49,908 (F1), 42,768 (F2), 53,419 (F3), 44,140 (F4), 46,097 (F5), and 41,114 (F6) percent, respectively. The values of KMO (0,715) and Bartlett (10.609, 31, Sig=0,001 <0,5), statistically shows that the retained factor is appropriate to describe the correlation structure between the presented items, this is also corroborated by the Cronbach's alpha (0,945).

Table. 4: Factors and Items

Factors and Items	Loading by Factor	Total Variance Explained (%)	Cronbach's alpha by factor
F1- Synergetic Innovation		49,908	0,736
AI-driven Innovation	0,835		
Collaboration	0,778		
Unified Strategy	0,778		
Change Resistance	0,615		
Employee Integration	0,457		
F2- Strategic Innovation		42,768	0,766
Adaptability Challenge	0,744		

Dynamic adaptation	0,705		
Market Agility	0,668		
Innovative Infusion	0,664		
AI Potential	0,640		
AI Concerns	0,605		
Relational Agility	0,528		
F3- Sustainable Resilience		53,419	0,756
Organization Adaptation	0,879		
Resilience	0,863		
AI-Driven efficiency	0,819		
Crisis Resilience	0,538		
Innovation Sustainment	0,441		
F4-Fostering Growth		44,140	0,730
Culture Impact	0,811		
Support Catalyst	0,781		
Intelligence Augmentation	0,731		
Digital Enhancement	0,631		
Relations Influence	0,357		
Innovation Cultivation	0,566		
F5- Collective Success		46,097	0,756
Collaborative Performance	0,806		
Culture Impact	0,752		
Culture Influence	0,691		
AI Innovation	0,678		
Hybrid Synergy	0,580		
Collaborative Implementation	0,526		
F6-Organizational Performance		41,114	0,709
AI-Value	0,800		
Strategic Motivation	0,737		

Adaptation	0,699
Flexible Control	0,558
Inclusive Strategy	0,504
Thrust	0,479
KMO	0,715
Bartlett's test of sphericity	$\chi^2 (595)= 10\ 609,031$; Sig. < 0.001
Cronbach's alpha total	0,945

Source: Own elaboration

Legend: Synergetic Innovation (H1); Strategic Innovation (H2); Sustainable Resilience (H3); Fostering Growth (H4); Collective Success (H5); Organizational Performance (H6).

As mentioned previously in point 4 (Data and Sample), a Likert scale was used to construction of the questionnaire. In that sense, qualitative variables were generated, and a change in the measurement scale was carried out to be able to apply a multiple linear regression (MLR), which is more robust and fulfilled the main application assumptions. For the scale measurement change, $ratio = \frac{scale\ value - 1}{4} * 100$ was used, as suggested by Kulage (2013). A MLR was used to answer the H1 and H2 which the main results are presented in Table 5, noticing that the model obtained satisfies the main validation assumptions: the random variable of the errors has normal distribution with null mean value, no correlation (Durbin-Watson test), and homoscedasticity (change statistics). The collinearity statistics (VIF – Variance Inflation Factor) shows that the values in the exposed hypothesis (H1 and H2) are lower than five, showing that the non-existence of multicollinearity problems for the independent variables. Graphical analysis, particularly the application of Durbin-Watson test, verified the null autocorrelation of the residuals on both H1 and H2 Hypothesis. The acceptance region, obtained with the support of the table for the referred test, is given by $[d_u; 4 - d_u] = [1.73; 2.28]$, considering that the test value (1,891 for H1) and (2,329 for H2) belongs to the obtained interval (Montgomery, 2012).

Table 5. Results of the Multiple Linear Regression (H5)

Model	Unstandardized Coefficients	t	Sig.	Collinearity Statistics	Durbin-in-	Adjusted R	Change Statistics
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		B	Std. Error			Tolerance	VIF	Wats on	Squar e	F Change	d f	df2
Depen dent Variabl e	(Constan t)	1,607	0,226	7,115	<0,001							
H1A	H1B	0,22	0,047	0,475	0,635	0,854	1,171	1,891	0,404	61,777	4	355
	H1C	0,395	0,40	9,978	<0,001	0,647	1,546					
	H1D	0,72	0,36	2,012	0,045	0,813	1,231					
	H1E	0,129	0,49	2,665	0,008	0,628	1,593					
Depen dent Variabl e	(Constan t)	0,542	0,284	1,91	0,057							
H2A	H2B	0,268	0,075	3,589	<0,001	0,602	1,662	2,329	0,301	26,821	6	353
	H2C	0,395	0,059	6,693	<0,001	0,661	1,513					
	H2D	-0,043	0,048	-0,0896	0,371	0,635	1,575					
	H2E	0,084	0,051	1,634	0,103	0,562	1,780					
	H2F	0,182	0,046	3,916	<0,001	0,800	1,250					
	H2G	-0,049	0,055	-0,051	0,367	0,621	1,610					

Source Own Elaboration

Concerning the *H3* and *H4* hypothesis, it was used a matrix of Spearman's correlation (a non-parametric coefficient is indicated for the type of scale measure used). Table 6 shows the values for hypothesis H3, this hypothesis H0: *H3X* is independent of *H3Y* versus Ha: *H3X* is dependent of *H3Y*. Considering the level of correlation in Spearman rho, we rejected the null hypothesis (H0).

Table 6. **Correlation is significant at the 0,01 level (two-tailed)

Spearman's <i>rho</i>	H3A	H3B	H3C	H3D	H3E
H3A	1	0,208**	0,217**	0,218**	0,297**
H3B		1	0,206**	0,422**	0,310**
H3C			1	0,675**	0,660*
H3D				1	0,687**
H3E					1
<i>n</i>	360	360	360	360	360

Source: Own elaboration

Table 7 represents hypothesis H4, under the hypothesis H0: *H4X* is independent of *H4Y* versus Ha: *H4X* is dependent of *H4Y*. From the table, it can be inferred that all correlations indicate a low but, statistically positive monotonic relationship, this implies that in all considered situations, the null hypothesis (H₀) is rejected.

Table 7. **Correlation is significant at the 0,01 level (two-tailed). All the *rho* values are statistically significant at the 5% level

Spearman's <i>rho</i>	H4A	H4B	H4C	H4D	H4E	H4F
H4A	1	0,365**	0,107*	0,151**	0,372**	0,150**
H4B		1	1	0,228**	0,459**	0,360**
H4C				0,630**	0,305**	0,528**
H4D				1	0,254**	0,595**
H4E					1	0,387**
H4F						1
<i>n</i>	360	360	360	360	360	360

Source: Own elaboration.

6. Research Findings

To test the first and second hypothesis (H1; H2), we used a linear regression assessing the model with the following measures: Significance (*p*-value), path coefficients (β), R², the effect size (*f*), and the interpretation of the variables. For the third and fourth (H3; H4) hypothesis, a Spearman's

correlation was performed to measure and understand the degree of variables. Lastly, the fifth and sixth (H5; H6) was submitted to an independent sample *t*-test (a non-parametric test).

H1: *AI integration and strong management relationships drive innovative strategies in the organization's strategic planning process.*

The multiple linear regression analysis strongly Hypothesis H1, indicating that AI integration contributes to the development of innovative strategies in organizational strategic planning process ($\beta = 1,607$; $t = 1,911$, $p < 0.057$). However, the impact of strong management relations while suggested, does not reach statistical significance influence (Sig=0,635), The combined effect of AI and strong management relations is shown to drive strategies contributing to significant value for employee loyalty and retention (Sig=<0,001). Notably, resistance to change, observed in AI implementation (Sig=0,045) allows organizations to align efforts and outcomes for enhanced employee motivation (Sig=0,008).

H2: *AI integration with strong management relationships enhances organizational adaptability enabling agile strategies and a competitive edge in dynamic markets.*

In testing Hypothesis H2, a multiple linear regression (MLR) analysis was employed to examine the connection between AI integration with strong management relationships and organizational adaptability. The results revealed that addressing the challenges posed by demanding, challenging, and dynamic markets is a primary concern for managers and leaders today ($\beta = 0,542$; $t = 7,115$, $p=0,057$). It's essential to note that while the p-value is 0,057, which is marginally above the conventional significance level of 0,05, the relationship shows a trend toward significance. Organizational adaptability, defined as the capacity to swiftly pursue new opportunities, avoid complacency, and adjust to new markets conditions, was significantly associated with AI integration and strong management relationships (Sig=<0,001). This suggests that organizations with effective AI integration and strong management relationships are better equipped to navigate and respond to the challenges of dynamic markets. Additionally, the results indicated a noteworthy relationship between the integration of artificial intelligence in organizations and job displacement, as well as cost reduction (Sig=<0,001). This underscores the multifaceted impact of AI integration on organizational dynamics, encompassing both strategic advantages and potential challenges.

H3: *AI integration, combined with robust management relationships, promotes organizational resilience, aiding in crisis navigation and the development of sustainable strategies.*

Hypothesis (H3), Spearman's correlation was used between the variables. Table 6 shows that there are several relationships between the related variables. H3A shows that there is a weak positive association ($\rho=0,208$, significant at the 0,01 level) with H3B, suggesting a connection between the belief in organizational actor's responses to shock and the belief in organizational resilience. Indicating that individuals who believe in the constant evolution of organizations due to the responses are likely to also believe in the capacity of organizations to survive. Regarding H3A and H3C weak positive association ($\rho=0,217$, significant at the 0,01 level) we were able to observe that those who believe in the constant evolution of organizations due to responses to shocks may also believe in the productivity-enhancing potential of AI. A weak positive association ($\rho=0,218$, significant at the 0,01 level) between the variables (H3A and H3D) states that individuals who believe in the evolution of organizations due to responses to shocks may also believe in the positive role of AI in crisis navigation and strategic sustainability. A moderate positive association ($\rho=0,297$, significant at the 0,01 level) from H3A and H3E, implies that those who believe in the constant evolution of organizations due to responses to shocks may also believe in the transformative potential of AI in sustain culture of innovation and strategic planning. weak positive association ($\rho=0,206$, significant at the 0,01 level) between H3B and H3C indicates that employees who believe in organizational resilience may also hold the belief that AI contributes to enhanced productivity. A strong positive association ($\rho=0,422$, significant at the 0,01 level) between H3B and H3D suggests that organizational resilience may strongly support the idea of AI, in combination with effective management being crucial for crisis navigation and sustainable strategic development. A moderate positive association ($\rho=0,310$, significant at the 0,01 level) suggests that those who believe in organizational resilience may also see AI as playing a role in fostering a culture of innovation and supporting strategic planning efforts. A strong positive association ($\rho=0,675$, significant at the 0,01 level) between H3C and H3D, states that believing that AI enhances productivity may support that the idea of effective management, is beneficial for crisis navigation and uncovering sustainable strategies. A strong positive association ($\rho=0,660$, significant at the 0,01 level) between H3C and H2E suggests that employees who believe in AI enhancing productivity may also believe in its capacity to sustain a culture of ongoing innovation.

H4: AI integration and supportive management relationships foster an innovative culture, driving creative strategies for continuous organizational growth.

For this hypothesis (H4), Spearman's method was also used to analyze the variables. With that in mind, it could be acknowledged that the rho indicates a positive monotonic relationship at some levels. Based on the matrix (Table 7), H4A and H4B have a moderate positive monotonic relationship ($\rho=0,365$, significant at the 0,01 level) meaning that organizational culture's influence on employee behaviors and company performance is positively associated with management support, suggesting that a supportive management environment encourages the successful implementation of innovative strategic plans. On the other hand, H4A and H4C have a weak positive monotonic relationship ($\rho=0,151$, significant at the 0,01 level) shows that the influence of employee behavior and company performance, as shaped by organizational culture, is related to the belief that AI stimulates human intelligence. This suggests a connection between organizational culture and perceptions of AI's role in human cognition, perception, decision making, and action. Lastly, H4A and H4D have a moderate positive monotonic relationship ($\rho=0,151$, significant at the 0,01 level). The initial premise of organizational culture (H4A), which emphasizes employee's behavior and company performance, suggests that a supportive management environment encourages the successful implementation of innovative plans.

H5: Collaborative management facilitates seamless AI implementation, optimizing resources and enhancing organizational performance.

In examining hypothesis H5, the results do not provide for the idea that collaborative management has a significant impact on these specific aspects of AI implementation and organizational performance in the context of this study. The relationship described in the hypothesis is not conclusively supported by the data analysis, so, the Hypothesis is rejected.

H6: Trust-based management relationships, coupled with AI integration, cultivate a positive organizational culture with AI and align employee goals with strategic initiatives for collective success.

In testing the hypothesis (H6), which posits that the combination of the trust -based management relationships and AI integration enhances organizational culture, aligns employees' goals with strategic initiatives creates value for employees and facilitates their career lives, the findings shed

light on the perceived value by employees. The obtained results ($Z=16,245$; $df=358$; $Sig=<0,001$; $t=-0,747$) are significant ($p<0,001$) and we reject the null hypothesis. Unexpectedly, the analysis uncovered a different facet, revealing that a control approach – fostering flexibility, adaptability, and information sharing – assist employees in navigating contingencies associated with AI ($Z=15,987$; $df=358$; $Sig=<0,001$; $t=2,077$). These unexpected findings suggest that AI contributes significantly to higher involvement and participation in company life. Moreover, the results have a 95% confidence interval, providing additional assurance in the precision of our findings.

7. Discussions and Conclusions

The exploration of how AI technologies play a pivotal role in shaping and enhancing strategic planning with dynamic businesses environments. Our attention is directed towards understanding how AI contributes to organizational adaptability during the transition phase, a period marked by constant and rapid changes propelled by technological advancements (Vecchiato, 2012; Dana, 2022; Gandrita, 2024). Recognizing this, there is an imperative for AI and effective management to contribute to the development of innovative approaches applicable to strategic planning. This, in turn, can enhance the ability to extract benefits (Boun, 2001) and allocate more resources to strategies such as innovation, education, skill development, and resource efficiency, necessitating investments in human capital (Tirumala and Tiwari, 2020). During this AI transition phase, organization adaptability has become a matter of utmost importance. It involves adapting, pursuing new opportunities, avoiding complacency, and adjusting to new market conditions by searching for new knowledge, innovation, information, and learning (Bien, 2018). In the context of resistance to change, AI is presented as a tool for organizations to align their efforts and enhance employee motivation, it is essential to consider that workers often fear being replaced by technological solutions (Koren, 2018; Bhattacharyya, 2019), leading to a decrease in their workplace participation. The involvement of everyone in the company's process has the opposite effect on the development of human cognition and strategic initiatives liberating workers from repetitive tasks, and making them more productive (Bryjolfsson, 2021). Employee contribution and belief in the transformative potential of AI tend to be more open to a culture of innovation and become more resilient in acquiring a position of supporting strategic planning efforts which is beneficial for crisis navigation and uncovering sustainable strategies. As a result, they become more

productive, believe in their skills, and their capacity to sustain a culture of ongoing innovation possibly leading to the creation of a new human-AI hybrid intelligent team mode (Sarker, 2019; Vossing et al., 2022). Organizational culture's influence on employee behaviors and company performance is positively associated with management support, suggesting that the environment encourages the successful implementation of innovative strategic plans. Furthermore, the data reveals that females from 26-35 years old considered that applying this technology to the digital environment improves effectiveness and work efficiency. It becomes necessary to reinforce the optimization of resources and the enhancement of performance in the context of strategic planning improving effectiveness and work efficiency, this aligns with Tirumala and Tiwari (2020) who proposed the application of higher levels of resources to support these strategies leading to the successful implementation of innovative plans. Furthermore, when adopted in organizations it creates value for employees, is expected to facilitate their career lives, and contributes significantly to higher involvement and participation in company life.

8. International Business

International businesses often grapple with the challenges of adapting and navigating through to new markets. Our conclusions push forward for the use of AI as a tool that helps to facilitate this integration. Whether in the exploration of new opportunities or mitigating risks, strategic incorporation of AI technologies can offer international businesses a nuanced and data-driven approach to improve decision making.

Recognize that the successful implementation of innovative strategic plans is positively associated with management support and organizational culture, in which international businesses are prompted to assess how these factors align with their global operations. In that sense, it becomes more important to foster an inclusive and supportive workplace culture that capitalizes on various strengths and preferences of a diverse workforce.

9. Recommendations

The current research, in contrast with the conclusions drawn by Biden (2018), contributes to the formulation of guidelines that advocate for a standardized blueprint for the organizational

workforce. In the era of digital technologies, elevating the learning cycle, fostering adaptability, and refining strategic planning structures becomes imperative. In this context, the following recommendations suggest:

Embrace AI and Effective Management – Recognize the imperative of AI and effective management to contribute to developing of innovative approaches in strategic planning and using technology to manage the integration of novel strategies.

Explore Hybrid Intelligent Team Models – Consider the creation of a new human-AI hybrid intelligent team model, as suggested by Sarker (2019) and Vossing et al. (2022), enhancing productivity and innovation within the organization.

Consider Demographic Perspectives – Tailor strategies based on diverse perspectives (ages) within the organization. The application of AI in the digital environment improves effectiveness and work efficiency.

Supportive Organizational Culture – Recognize the positive association between organizational culture, employee behaviors, and company performance. Management support is crucial in encouraging the successful implementation of innovative strategic plans.

Integrate Sustainable Practices into AI Strategies – Integrate sustainability considerations into developing and deploying of AI technology for strategic planning. Advocate for the incorporation of eco-friendly practices and resource-efficient algorithms in AI systems.

10. Theoretical and Practical Implications

The theoretical implications of this study underscore the pivotal role of effective navigation in promoting organizational success within the ever-changing landscape. While this research focuses on three specific domains – strategic planning, artificial intelligence, and organizational performance. It also suggests avenues for future studies. The se should encompass additional strategic areas such as sustainability, HR, performance, and innovation. By exploring these dimensions, future research can unveil new scenarios for managers and help formulate innovative strategies for organizations. The study reinforces the concept of a holistic approach to management suggesting that technology and inclusivity, collectively lead to more effective organizational outcomes. In this context, we have concluded that under turbulent marketplace

conditions, it is important to continually enhance technological options to increase competitiveness and create superior performance. Practically, implementing the findings of this study can foster the development of a diverse and collaborative workplace culture. Organizations are urged to adopt practical measures to enhance employee loyalty and retention, recognizing the value of a continuous and engaging workforce.

11. Limitations and Future Research

The study has several limitations. First, it is crucial to acknowledge the potential influence of participants' cultural backgrounds and the existing organizational environment in relation to the adoption of AI technology. Secondly, future research should focus on optimizing the compatibility of AI tools with strategic planning methodologies to enhance results and contribute more effectively to decision-making process. In subsequent studies, there is a need to conduct a thorough analysis of both the negative and positive effects of AI on international organizational structures. This necessitates engaging in longitudinal studies to gain deeper insights into the evolving dynamics. Finally, we propose delving into the study of Human-AI hybrid intelligent teams as a promising avenue for future research.

12. Abbreviations

AI – Artificial Intelligence

MR – Management Relations

MLR – Multiple Linear Regression

SP – Strategic Planning

13. Additional Information

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Paper contributions to our research agenda

While technology poses a challenge for some organizations and is deemed an intricate part of dynamic capabilities, we present the final chapter of our research “*AI integration and strategic planning: fostering inclusivity and strategic evolution in the workplace*”. This study delves into the symbiotic relationship among effective strategic planning, management relations, artificial intelligence, and potential disruptions that may impact talent retention, and loyalty.

Our findings show the pivotal role of AI technologies in shaping and enhancing strategic planning within a dynamic business environment. It emphasizes the need for AI and effective management to contribute to innovative approaches during transition phases marked by rapid technological changes.

This adaptation is crucial for extracting benefits, allocating resources strategically, and invest in human capital. AI is presented as a tool to align organizational efforts, enhance employee motivation, and counter resistance to change. Employee involvement in AI processes liberates them from repetitive tasks, fostering productivity and belief in their skills, ultimately contributing to a culture of ongoing innovation.

The positive association between organizational culture, management support, and successful implementation of innovative strategic plans is underscored. Additionally, data indicates that females, being the highest rate, perceive AI application in the digital environment as improving effectiveness and work efficiency, reinforcing the optimization of resources in strategic planning. Overall, the adoption of AI is seen as creating value for employees, facilitating career development, and fostering higher involvement and participation in company life.

Considering these findings, we suggest the following recommendations to complement our research:

Embrace AI and effective management – Recognize the imperative of AI and effective management to contribute to developing of innovative approaches in strategic planning and using technology to manage the integration of novel strategies.

Explore hybrid intelligent team models – Consider the creation of a new human-AI hybrid intelligent team model, as suggested by Sarker (2019) and Vossing et al. (2022), enhancing productivity and innovation within the organization.

Consider Demographic perspectives – Tailor strategies based on diverse perspectives (ages) within the organization. The application of AI in the digital environment improves effectiveness and work efficiency.

Supportive organizational culture – Recognize the positive association between organizational culture, employee behaviors, and company performance. Management support is crucial in encouraging the successful implementation of innovative strategic plans.

Integrate Sustainable Practices into AI Strategies – Integrate sustainability considerations into developing and deploying of AI technology for strategic planning. Advocate for the incorporation of eco-friendly practices and resource-efficient algorithms in AI systems.

Conclusions

This research begins by identifying the gaps and intricacies related to strategic planning, which have led to the near disappearance of this systemic process. Using this perspective as a foundation for our thesis, we aim to understand (1) what needs to be rethought in strategic planning and (2) what areas can be introduced or recaptured for this method to be more effective.

After defining the purpose of our thesis, we formulate the central question: “*How can the strategic planning process be improved to increase effectiveness?*” which will be the starting point for this study. This answer is explored through six studies that incorporate the traditional methodologies and use different software to obtain dissimilar responses and generate new outcomes applicable to the organizations.

We initiate a comprehensive systematic literature review aimed at unveiling the contemporary duality of strategic planning. Our focus was on delving into these challenges and understanding the impediments through the lens of dynamic capabilities. A bibliometric analysis was used to determine the most relevant journals, authors, and citations. Furthermore, we could observe when and why planning began its ascending path to the lives of academics.

Upon the conclusion of the research, we discover the existence of four pitfalls drawn propositions corroborated with the present organizational context. In that regard, following the results of our research, the found pitfalls were:

- The Complexity of processes can confuse the workforce and challenge workers to deal with the new and the oldest mechanisms.
- People’s unwillingness to change brings several difficulties to managers due to human relations and the inability to adapt to new situations.
- The data misreading points out the need for more interpretation, retrieving the wrong conclusions, and contributing to the wrong decision-making.
- The strict hierarchy model relates to the vital role of top management and what barriers are needed to surpass the challenges that level of management faces.

In this study, it was also possible to understand the intrinsic significance of strategic planning, particularly in the ongoing pandemic and beyond. This heightened its relevance, which we confirm through the number of articles and citations. Traditional strategic planning needs to address prevailing organizational constraints and challenges. Nevertheless, by incorporating the dynamic

capabilities approach, managers gain the ability to formulate innovative strategies, integrating them into the fabric of their strategic planning. Moreover, planning influences diverse domains, particularly scientific. This expansion encompasses the formulation of research agendas and explores the interconnection between strategic planning and the digital realm.

By defining the problematic areas in the first study, we could advance on our research by searching for new avenues. In this regard, the foundation of the second chapter centers on the strict hierarchy model. As we know, strategic planning is initiated by top management, who delineates guidelines for each management level and the heading of the organization. This study addresses the limitations faced by top management that hinder strategic planning, and the need to adapt processes to engage individuals from different hierarchy levels in strategic planning for greater effectiveness. In this research, a qualitative methodology is presented in which we interview participants from top management and similar.

The results indicate that when employees exhibit a proficient attitude towards their organization, collaboration with top management becomes viable, allowing them to actively participate in strategic planning and be perceived as valuable contributors. Positive interrelations between different organizational levels catalyze a collective effort towards common objectives and create additional opportunities for all involved.

Additionally, incorporating the seven perspectives that enhance planning can elevate the strategic process. Lastly, the identification of scenarios from various management levels resulted in several enhanced outcomes. Applying dynamic capabilities theory underscores the importance of leveraging technology to provide workers with real-time information, thereby preventing misinformation and promoting sound decision-making.

However, the world was overwhelmed with a virus that took it by storm and changed everyone's lives. This was a time when decisions were taking place, especially for top management and their businesses, who required answers and faster information to know how to deal with the pandemic. In that sense, we needed to understand what plans need to be put in place and what changes organizations need to have. With that, the third chapter called: "*Overcoming Remote Leadership Challenges: Lessons Learned from COVID-19*" was created.

In this research, it was possible to understand that it is essential to have a proficient attitude. This unfamiliar context offers internal stakeholders the opportunity to acquire new insights, thereby adding greater value to the entire workplace. Consequently, we have identified new tools

that facilitate remote work functions that enhance the competitive process. Using digital tools such as Zoom, MS Teams, and WhatsApp increases engagement and ensures the continuity of daily operations.

Furthermore, we have determined three dimensions managers can address and incorporate into strategic planning as a pathway to success. Firstly, awareness of daily tasks involves providing the right tools, training, and work environment while focusing on company goals and fostering team cohesion.

Secondly, leaders need to develop soft skills such as resilience, courage, flexibility, communication, and emotional intelligence in the context of remote work. Lastly, concerning behavior, teams expect their leaders to remain calm under pressure, provide reassurance, maintain a positive mindset, and promote solidarity.

In our endeavor to address the idiosyncrasies within management levels and propel the evolution of strategic planning by bridging the existing gaps, we recognize the imperative to incorporate additional variables and components into the strategic planning framework. The process of remote work demands changes in how organizations work and what technologies need to be added to continue operations.

As times move forward COVID-19 starts to be a non-issue for every citizen, in other words, getting slowly back to normality. Although we maintain our focus on strategic planning, we could observe that there was a demand from younger generations of workers for changes exhibiting awareness and consciousness across the theme of sustainability.

This theme has become a challenge for every company and only a few managers have the resources or ability to add or solve it. The fourth chapter delved into the role of strategic planning, environmental responsibility, and the correlation between workforce retention. For this research, a quantitative approach was used with the aid of SPSS software.

The results show that a higher commitment from the organization, coupled with enhanced motivation, pro-environmental initiatives, and positive top management behavior will contribute to the organizations intentions to apply sustainable practices.

Also, it was observed that providing environmental education and training, and encouraging employees to share knowledge and best practices fosters a more robust environmental corporate culture and improved performance, in contrast to organizations that neglect such efforts. This prompts a reflection on the corporation's behavior regarding sustainability in their daily operations

or long-term strategic planning. In practical terms, the associated costs will be a significant factor to consider, and any action toward sustainable practices will necessitate resources and substantial changes in employee habits.

With four studies now completed, we decided to develop a fifth study that aims to confirm the previous lessons learned, providing a better ability to understand planning and the parameters that can enhance its effectiveness. In this research we use both qualitative and quantitative methods to confirm the findings of previous studies, it also seeks to uncover additional information that may need to be noticed.

The results show that feedback and reporting should be followed by continuous training to facilitate the development of new workflow strategies and provide opportunities for personal development (*Confirmed in the fourth study*).

To enhance professionalism, it is necessary to increase organizational motivation by engaging in mental exercises that allow workers to explore future possibilities, and workplace changes, as well as understand the contributions they can make to elevate planning and improve work life for everyone. Additionally, top management suggests that middle and lower management should have access to the organization's overall status to increase awareness and foster the sentiment of belonging.

Our results show that a 360° assessment is needed to enable communication and eliminate misinterpretations or decisions at various levels. Technology is sometimes perceived as a roadblock, so it is necessary to approach it with a fresh perspective to reduce resistance to change and support department priorities (*Confirmed in the second and third studies*). Throughout our research, we observed a consensus among managers that significant disruptions arise in leadership changes, staffing, or resources (*Confirmed in the third study*) availability, leading to long delays in strategic planning or rendering plans obsolete soon after their inception. If teams slowly adopt the plan, it will become outdated and irrelevant to everyday processes and priorities.

To address the question of resistance to change, managers believe that the focus should be on communication, soft skills, and helping employees understand the ongoing changes, the expected benefits, and how the processes will be implemented (*Confirmed in the third study*). Furthermore, since resistance to change is noticeable among senior employees, techniques like visual aids can be employed to demonstrate the results or illustrate incremental changes over time. Top

management should seek and incorporate the opinions of those with theoretical and practical experience (*Confirmed in the fourth study*).

The topic of loyalty and retention is analyzed by the ability to offer better salaries, participation in the organization, promote a better work-life balance, provide new positions with new challenges, reward performance, on-the-job training, mentoring, workshops, and courses (*Confirmed in the second, third, and fourth studies*). However, to achieve these benefits, top management and middle management need to recognize the higher level of commitment required from employees in acquiring competencies (*Confirmed in the second study*). Motivation is considered a force that will enable and simplify work, the development of programs should focus on increasing efficiency and providing continuous training/education for more opportunities in the marketplace (*Confirmed in the third study*).

For middle managers, strategic planning should also incorporate a sustainable component that emphasizes the value of environmental policies and attracts new generational members. Over time, employees have grown and have not become passive performers, this requires processes to be less bureaucratic for greater worker commitment (*Confirmed in the fourth study*). Executives need to see a higher state of involvement of the lower levels before accepting any advice, changes, or updates on planning.

Lastly, as we continue to delve into strategic planning intricacies, we observe that modern times require modern solutions. In the third research, we touch on technology which helped several managers to continue their duties (Gandrita, 2024). Also, the resource for technology has never been more used than nowadays. With that in mind, we decided to add technology to strategic planning due to the challenges it presents and the fact that it is an intricate part of dynamic capabilities.

This study addresses the symbiotic relationship between effective strategic planning, management relationships, artificial intelligence, and potential disruptions affecting talent retention and loyalty. A quantitative approach giving new outcomes to managers and a bibliometric analysis to acquire papers with relevant information regarding the object of study.

Our findings show the pivotal role of AI technologies in shaping and enhancing strategic planning within a dynamic business environment. It emphasizes the need for AI and effective management to contribute to innovative approaches during transition phases marked by rapid technological changes.

This adaptation is crucial for extracting benefits, allocating resources strategically, and investing in human capital. AI is presented as a tool to align organizational efforts, enhance employee motivation, and counter resistance to change. Employee involvement in AI processes liberates them from repetitive tasks, fostering productivity and belief in their skills, ultimately contributing to a culture of ongoing innovation.

The positive association between organizational culture, management support, and successful implementation of innovative strategic plans is underscored. Additionally, data indicates that females, at the highest rate, perceive AI applications in the digital environment as improving effectiveness and work efficiency, reinforcing the optimization of resources in strategic planning. Adopting AI is seen as creating value for employees, facilitating career development, and fostering higher involvement and participation in company life.

Considering these findings, we suggest the following recommendations to complement our research:

Embrace AI and effective management – Recognize the imperative of AI and effective management to contribute to developing innovative approaches in strategic planning and using technology to manage the integration of novel strategies.

Explore hybrid intelligent team models – Consider the creation of a new human-AI hybrid intelligent team model, as suggested by Sarker (2019) and Vossing et al. (2022), enhancing productivity and innovation within the organization.

Consider Demographic perspectives – Tailor strategies based on diverse perspectives (ages) within the organization. The application of AI in the digital environment improves effectiveness and work efficiency.

Supportive organizational culture – Recognize the positive association between organizational culture, employee behaviors, and company performance. Management support is crucial in encouraging the successful implementation of innovative strategic plans.

Integrate Sustainable Practices into AI Strategies – Integrate sustainability considerations into developing and deploying AI technology for strategic planning. Advocate for the incorporation of eco-friendly practices and resource-efficient algorithms in AI systems.

Table1: Chapter map for the central question

How can the strategic planning process be improved to increase effectiveness?						
Research	First Chapter	Second Chapter	Third Chapter	Fourth Chapter	Fifth Chapter	Sixth Chapter
Method	SLR	Qualitative	Qualitative	Quantitative	Both	Quantitative
Main Topic	Challenges and Pitfalls	Top Management	Remote-Work	Sustainability	Management Levels	Technology
Year	2022	2024	2022	2023	2023	2024
Purpose						
Chapter Connection	Strict Hierarchy is considered the most important factor in the creation of SP.	The limitations faced by top management that hinder SP and the engagement of the remaining levels	How top management deals with the pandemic context, real-time work settings, and solutions to improve effectiveness.	Employee demands after the pandemic context, sustainability in the organization, and workforce retention.	Understand if previous conclusions can be verified and if there is any new information to add to our study.	The relation between AI, SP, and, MR. Also, the disruptions in loyalty and workforce retention.

Source: Own elaboration

Theoretical Implications

In this research, we propose three theoretical contributions that offer comprehensive answers to our central question presented in the introduction. Firstly, our studies deliver a nuanced perspective on several topics related to the dynamic capabilities' theory, highlighting the interplay between planning, its pitfalls, levels of management, sustainability, and artificial intelligence. We assert that top management needs to be a mediator in the improvement of performance and effectiveness, facilitating strategic reconfiguration of processes and enabling companies to navigate the complexities of structuring a plan.

Secondly, our study establishes that it requires investment in digital technologies (Gandrita, 2022), however, this is not the only factor that leads to improved performance. Rather, it is the strategic enhancement understanding of what are the areas that can improve organizations (e.g. sustainability and AI) to springboard performance, innovation, and adaptability. Our

probabilistic analysis shows that strategic planning and dynamic capabilities are not mere theoretical applications, instead, they are critical approaches that convert instability into actionable insights, understand markets, and elevate each stakeholder.

Third, we underscore the role of strategic planning as a critical component for the construction of goals for organizations, these studies cannot be seen just as an outcome and an answer to its sub-questions but as a fundamental driver of competitive advantage and transformation. Also, in response to our question we could understand that the combination of several conditions leads to effectiveness, each configurational analysis highlights that the synergy between several conditions is essential.

This research not only contributes to the academic discourse but also offers practical implications for the use of strategic planning in a fast-paced digital economy.

Practical implications

Concerning practical implications, we obtained some interesting insights that would be very helpful and interesting for policymakers and managers. For example, it is necessary to encourage the participation of all levels of management in the strategic planning process to develop a more comprehensive and effective strategy. This can be achieved through the integration of dynamic capabilities into their strategic planning process, remaining flexible and adaptable to the rapid changes presented in the world.

Leveraging digital tools such as artificial intelligence (AI), mentioned in the final research, can provide deeper insights and more accurate predictions, thereby enhancing strategic planning. In that sense, organizations need to invest in this technology and ensure that the workforce is properly trained to use it. This can be achieved through continuous training and development programs for all levels of management, always considering their feedback and insights.

Planning to be an ongoing winnable process, requires a culture that encourages innovation, and creativity recognizes and rewards their employees, and their ideas, promotes a space for experimenting with new things, and encourages sharing ideas between departments.

Finally, due to recent changes in the global scenario, organizations need to add a sustainable variable to their goals, this improves the organization footprint and makes managers appeal to socially conscious consumers and employees. By implementing these implications, it

becomes possible for organizations to optimize their strategic planning processes, making them more dynamic, effective, and flexible.

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Appendixes

Reviewers Statements

First study

Result of Review for your paper entitled: "Strategic Planning pitfalls in Society 5.0: A Systematic Literature Review" submitted to the Mediterranean Journal of Social Sciences. Your paper is accepted for publication in MJSS Vol. 13 No. 5 September 2022 edition with no revision required. Since your paper is accepted for publication with no revision required.

Ritchman Publishing

Office 1, Forest House Business Centre,
8 Gainsborough Road, London
England, E11 1HT

Second study

This study is already submitted and pending for review.

Third study

Many thanks for your submission to our journal. We have reached a decision regarding your submission to Journal of Business and Management Studies, "Overcoming Remote Leadership Challenges: Lessons Learned from COVID-19". After your paper has been subject to a Fast Track Review Process, it has been accepted to be published in our journal subject to minor revisions. Please find the results attached. After you make the revisions, send us the revised paper as soon as possible. We wish you the very best of luck with your future work and thank you for considering our journal.

Fourth study

First reviewer comments

The manuscript and content of the post are very well done. The topic this paper is focused on current challenges in researching the relationship between environmental responsibility and workforce retention, as well as the role of environmental responsibility in strategic planning. This paper addresses two research questions to understand the relationship between environmental responsibility and the workforce, as well as the role of environmental responsibility in strategic planning for greater efficiency and competitiveness. The originality of the paper can be found in the academic research of the topic based on the assumptions of the theoretical framework and the three hypotheses that emerged. The presented qualitative research fills the gap in organizational insights on strategic planning, employee retention, and a sustainable environment. The results provide an advance in current knowledge on this topic.

Significance:

I can state that the manuscript contributes to the research and academic debate about the possibility of "doing good by doing green" and what are the challenges in the strategic planning of commercial and non-commercial entities in the context of environmental responsibility of society and firms, and employee retention. The focus of the paper corresponds to the aims and topics of the special issue of the "Sustainability" journal.

Quality of Presentation:

The paper is written in an appropriate way based on a relevant review of the literature, current data, research methods, and analysis. The data and analyses are presented appropriately. We can accept standards for the presentation of research results.

Scientific Soundness:

A systematic review of the literature was carried out using the PRISMA methodology with an analysis of results based on bibliometric analysis and content analysis. Data management and description were based on literature research in WOS and Science Direct as scientific databases (3,916 results). The data is supplemented by our own research with 311 respondents. The research on the topic was supported by the results of hypothesis testing, 3 figures, and 7 tables. All

conclusions are substantiated and based on the results of the research methods. The paper will allow another researcher to reproduce the results.

Interest to the Readers:

I can state that the focus of the paper corresponds to the aims and topics of the special issue of the "Sustainability" journal and will attract a wide readership.

Overall Merit:

With regard to the results of the authors, the present study opens new questions and suggestions for further research into the issue of environmental responsibility and employee retention. I see the paper as a contribution to this path of knowledge.

I recommend the paper for publication within the academic and research discussion on the topic.

No significant comments. Minor remark:

I recommend the authors clearly state in the abstract also the information about the research of 3,916 publications on the topic from WOS and Science Direct world databases.

Answer to reviewer comments:

First of all, thank you so much for your kind note and remarks, we did include information about the research of 3,916 publications on the topic from WOS and Science Direct world databases in the abstract as you suggested.

Second reviewer comments

In general, it's hard to define the purpose of the article: talent management, sustainability, environmental responsibility... The article consists of three parts that are not fully interconnected.

1. Analysis of scientific articles published in the Web of Science database on sustainable development. The result of this analysis is shown in Figure 3. However, the figure itself is illegible.

2. Conducted survey research. No explicit linking of the content of the survey with the results of the previous stage (literature analysis). Table 6 also does not present all the data (in the country row, the combined share of Portugal, Poland and Italy is less than 64%. It is worth adding the "Other" row). Also missing all the questions presented in the survey.

3. In table 4, it is worth indicating the analysis period as 1983-October 2022.

4. In line 265, the authors state that "The initial search gives us a total of 154,862 results". However, there is no explanation of what initial means. Additionally in table 4 it is indicated that 3916 articles were examined.

5. In table 5 in the column "Field" only one value "M1" is indicated. Is this information relevant?

6. There is no reference to table number 7 in the article. There is also no explanation of the abbreviations used in it.

Answer to reviewer comments:

First of all, thank you for the time spent reviewing our paper and for all the remarks and suggestions which we gladly have implemented.

Regarding image 3 it was improved to be better understood and quality.

Table 6 is now further completed with all the available information.

Regarding what you mention on point 3 we would like to highlight that the presented dates refer to papers related to the associated keywords

Taking into consideration your remark on point 4, we gladly share that the mentioned explanation about the numbers is described to each extent the data was refined.

Regarding your comment on point 5 please note that the information is relevant as it is the result of data refinement and it was attributed as it is in the Management area, further we can point out that the field in which our research finds itself was designated by M1 (Management).

At last, considering your remark on point 6, we did correct the justification as suggested.

Third Reviewer comments

The paper is accepted without any further changes.

Answer to reviewer comments:

Thank you so much for your kind note and the time you spent reviewing our paper.

Fourth Reviewer comments

This article aims at finding out the relationship between environmental responsibility and workforce retention, as well as the role of environmental responsibility in strategic planning. The findings of this study promise to contribute to a better understanding of how social responsibility can improve employee retention and lead to a more efficient and effective end result. For that authors use a quantitative approach, combining interviews with a bibliographic analysis. The results of this study should provide insight on how social responsibility can improve employee retention and enhance organizational efficiency and effectiveness. In these conditions, the paper sounds really promising.

The literature review is rather complete, and it includes a dozen of fresh references as well linking somehow environmental responsibility and workforce retention. Nevertheless, I would complement the list of references by included both the newest (made in the last 2 years) and most cited works resulting from the combined search of “environmental responsibility and workforce retention” words as I miss some relevant references (e.g. “A strategy to assist management in workforce engagement and employee retention in the high tech engineering environment, E Kennedy, TU Daim - Evaluation and program planning, 2010 - Elsevier”, or “Corporate social responsibility impact on talent retention among Generation Y “, IA Zainee, F Puteh - Revista de Gestão, 2020 - emerald.com”).

The redaction style is rather uncomfortable for me; language is colloquial often (e.g. it uses the term “we” too often and), closer to the style of a magazine than to the one of a journal. It should be reviewed and adapted to the style of a scientific journal.

Figure 1 must be reviewed, as the word “sustainability” does not appear complete.

I have quite some problems with the rigor of the methodology, and about how it is explained as well:

The research method is not justified: why do we consider it an appropriate method? There should be a consistent and convincing (reference based) explanation here. As well, there is something wrong with the explanation of the PRISMA methodology: we have in line 237 that “literature review will be carried out using the PRISMA methodology (Table. 3).” If we look at Table 3, there is a recurrent reference therein, as it appears the sentence “Prisma methodology (Table. 3),” just at the beginning of Step 2. Could you please reorder, resort and better explain (and justify) the methodology?

I do not see clear why we use the words in lines 254-258 for the search and not others. There should be a clear justification on this fact as well.

The poll, its results and the presentation of them seems to be correct, congrats.

Finally, it is the first time that I see this type of acknowledgments. I can personally tell you that the pleasure is mine; the paper was easy to read, and I think that it will support the construction of a bridge between older and younger mindsets.

Answer to reviewer comments:

First of all, thank you for the time spent reviewing our paper and for all the remarks and suggestions which we gladly have implemented.

Regarding Figure 1 it was corrected, the word "sustainability" now appears complete.

We have extended the justification for the research method to be more consistent and convincing, also the explanation of the PRISMA methodology was improved and Table 3 was updated accordingly to your suggestions.

Taking into consideration your remark on the literature review, further literature was added according to your suggestions.

At last, regarding the redaction style, we try to keep the language simple and accessible so the paper is easier and more enjoyable to read since nowadays many readers of scientific journals can be from a very wide range of fields and expertise, however, if you feel like it is a must to keep the language more formal, we are open to rewriting it having a different style in mind please let us know your thoughts on this matter.

MDPI AG – Sustainability
St. Alban-Anlage 66 4052 Basel, Switzerland

Fifth study

First Reviewer Comments

Good morning, Dear Authors. The article is interesting and may interest the reader. However, it also has a few shortcomings that would be worth explaining.

1. The first part is based on the results of an interview of 14 representatives of the management boards of various companies (while 5 (35.7%) people are aged 18 to 25). I believe that this is too small a research sample, the text lacks information about representativeness.
2. In Table 1, next to "Organization" is "Other*". There is no explanation for the "*" character in the text.
3. Economic Size. Such a division is not in line with the division generally accepted in the European Union, and all the surveyed persons are from European countries.

4. In the second part of the article, there are surveys with 204 respondents. There is no explanation for such a research sample. There is no explanation of what questions were asked during the survey. Table 3 and table 6 are missing - Q1, Q2, Q5, Q6....

5. Correlation ratios lack a confidence level.

6. Figure 6 shows the correlation coefficients going from bottom to top (on the right). No information why other possibilities or combinations were not indicated.

7. No information whether all F1-Employee Engagement variables have the same weight? This remark also applies to the other variables F2-F4.

Thank you for the opportunity to read the article and the opportunity to review it. I hope that my comments will help to improve its quality.

Answer to reviewer comments:

Dear editor,

First of all, thank you very much for your words and feedback to improve my work.

Accordingly, to your recommendations I:

The representation of the qualitative data was small because involves top management. We had more answers but they were not available at the time to answer our questions. Nevertheless, we make that all the involved responded until we could not find any more information.

The Other refers to non-binary;

I adjust the economic size to be in line with the required information

I was added the information related to Q1,Q2,Q2.... The questions were added into the annexes;

The correlation level is 95%.

The combinations were related to the level of importance;

The information of each factor was added and we review all the inserted values for the models and factor loadings.

If you need more changes, please let me know.

Thank you very much for everything.

Second Reviewer comments

	Yes	Can be improved	Must be improved	Not applicable
Does the introduction provide sufficient background and include all relevant references?	(x)	()	()	()
Are all the cited references relevant to the research?	(x)	()	()	()
Is the research design appropriate?	(x)	()	()	()
Are the methods adequately described?	(x)	()	()	()
Are the results clearly presented?	()	(x)	()	()
Are the conclusions supported by the results?	(x)	()	()	()

The assessed article examines a highly relevant topic for organizations, exploring the link between strategic planning exercises and their implementation across different levels of the organization. The primary objective is to identify ways to enhance the relationship between management levels, fostering increased participation and motivation in strategic planning. Additionally, the article delves into the challenges of achieving higher retention levels and addresses factors contributing to resistance to change.

The article presents an introductory framework with sufficient information, supported by reputable sources, which are essential for research and text development. The research design is noteworthy, as it effectively combines qualitative and quantitative methods, allowing for valuable results. The methods, procedures, and tests employed are clearly described, and the results are effectively presented.

However, it would be beneficial if the authors included a summary table of the main findings in the global model, outlining factors and levels. This addition would greatly aid readers, particularly

those in business, in comprehending the structure of the results presentation from line 576 on page 19. This systematic overview would enhance the reader's understanding and provide valuable insights.

The conclusions drawn in the article are well-supported by the results, and the recommendations presented are relevant and valuable to the readership.

Answer to reviewer comments:

Dear Reviewer,

First of all, thank you for the time spent reviewing our paper and for all the remarks and suggestions which we gladly have implemented.

In the global model, we outlined a table with the factors and levels to aid the reader.

Best regards

DMG

Third Reviewer Comments

Introduction

1. Is it clear what is already known about this topic?
 - a. The literature review is extensive, covering several topics simultaneously. But its depth is somewhat limited.
2. Is the research question or aims clearly outlined?
 - a. Yes.
3. Is the research question justified given what is already known about the topic?
 - a. Yes.

Methodology

4. Is the study design appropriate to answer the aim?

a. Yes.

5. Are the study methods valid and reliable?

a. Yes.

6. Is there enough detail in order to replicate the study?

a. No. Using two methods, one qualitative and one quantitative, the authors do not allow replication of the study by other researchers.

b. In the qualitative method a more detailed description of the interviewees should be made, such as number of years of experience, hierarchical position, etc.

c. In the quantitative method, the authors do not present the questionnaire, the scales and their authors, as well as the variables. A table with this information should be inserted.

7. Is the process of subject selection clear?

a. Yes.

8. Are the variables defined and measured appropriately?

a. No. See above.

Results

9. Are the results stated clearly?

a. In the quantitative method, the results are presented in a clear and appropriate way.

b. In the qualitative method, the way the results are presented is inadequate.

10. Is the data presented in a clear and appropriate way?

- a. The same is true for data. The qualitative method presents no data, while the data for the quantitative method is presented adequately.

Discussion and conclusions

11. Are the results discussed from multiple angles and placed into context without being overinterpreted?

- a. Yes.

12. Do the conclusions answer the aims of the study?

- a. Yes.

13. Are the conclusions supported by the results? If not, are they supported by references?

- a. The conclusions supported by the results.

14. Are the limitations of the study fatal or are they opportunities to inform future research?

- a. It is not clear what limitations the authors presented. If they did not interview top management, why did they present the qualitative method. I think something was lost in translation and should be revised.
- b. Other than this incongruity, the limitations are not a problem.

References

15. Are the references relevant?

- a. Yes.

16. Have key studies been referenced or is a key reference missing?

- a. They could add additional references.

Title

17. Now that you know what the study is about, is the title informative and relevant?

- a. The title might be more accurate.

Abstract

18. Does the abstract clearly summarize what the results and conclusions are and the methodology used?

- a. Yes.

Overall

19. What did this study add to what was already known on this topic?

- a. The study is not groundbreaking in itself. But it confirms some of the contributions of other studies, and for that reason it becomes important.

20. Is the article consistent within itself?

- a. Yes.

21. Is there anything that stands out in the author or funder statement(s) that makes you question the objectivity of the study?

- a. No.

22. Structure.

- a. The structure of the paper should be improved in the "Research setting and methods" part. The authors should describe the methods (interview questions and questionnaire), describe the sample and the sampling process, present the results and then discuss the results. They can do this sequentially for each method or in parallel.

- b. This is the weakest part of the paper and should be improved.

Answer to reviewer comments:

Dear editor

I hope this message finds you well. I am writing to express my gratitude for the invaluable feedback you provided on my research paper. Your insightful comments have greatly contributed to enhancing the overall quality of the manuscript.

In response to your suggestions, I diligently made all the necessary changes to improve the clarity of the literature review. The scales and question (qualitative data) were added into annexes for the reader to have a better perception. Initially, I want to apply the questionnaires to top management. However, due to schedule issues and the request for an interview or their unwilling to answer lead un to interviews (qualitative data), and the research setting was adapted and improved.

If you need any more changes, please let me know

Fourth Reviewer Comments

Open Review	<input checked="" type="checkbox"/> I would not like to sign my review report <input type="checkbox"/> I would like to sign my review report			
Quality of English Language	<input type="checkbox"/> I am not qualified to assess the quality of English in this paper <input type="checkbox"/> English very difficult to understand/incomprehensible <input type="checkbox"/> Extensive editing of English language required <input type="checkbox"/> Moderate editing of English language required <input type="checkbox"/> Minor editing of English language required <input checked="" type="checkbox"/> English language fine. No issues detected			
	Yes	Can be improved	Must be improved	Not applicable
Does the introduction provide sufficient background and include all relevant references?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are all the cited references relevant to the research?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is the research design appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Are the methods adequately described?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Are the results clearly presented?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Are the conclusions supported by the results?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments and Suggestions for Authors	Based on Editor's decision.			

Answer to reviewer comments:

Dear editor

I hope this message finds you well. I am writing to express my gratitude for the invaluable feedback you provided on my research paper. Your insightful comments have greatly contributed to enhancing the overall quality of the manuscript.

In response to your suggestions, I diligently made all the necessary changes to improve the clarity of the tables, presenting the data and results in a more comprehensible manner. Additionally, I have revised the citations to include more relevant and influential authors, adding depth and credibility to the paper. Moreover, I have attached relevant annexes, specifically focused on the quantitative aspect, to supplement and bolster the research.

Furthermore, I dedicated considerable effort to refining the conclusions, ensuring they better align with and substantiate the obtained results, thus making the paper more convincing and impactful.

I sincerely appreciate the time and effort you took to review my work and offer constructive feedback. Your expertise and guidance have been instrumental in refining the paper and making it more academically robust.

If there are any further adjustments you believe could enhance the manuscript, I am more than willing to make them. Your satisfaction with the final version is of utmost importance to me.

Once again, thank you for your invaluable support. I am truly grateful for the opportunity to collaborate with you in improving this research paper. If you have any additional recommendations or queries, please do not hesitate to let me know.

Best wishes,

DMG

Sixth Study

Reviewer 1

An interesting paper that pulls together some useful insights into AI from a strategic management perspective. The readability of the paper could be improved with fewer tables as it became quite data-heavy at times which impeded the flow. Language errors meant it was difficult to follow the paper at times, especially in the introduction section, which needs revising. Long, verbose sentences in the first quarter of the paper make it hard to follow at times. A clear structure was

provided, and a theoretical background along with an introduction to the literature on AI, but typos were distracting, as was a lack of punctuation at times. The abstract also has typos that need revising.

Text size varies - needs to be aligned to submission guidelines throughout.

Figure 1 - I'm not sure how much value this graphic offers to the reader in terms of understanding.

To simplify, it could be stated in written format how they connect with one another.

3. Methodology - Table 2 could be cut out if necessary to reduce tables

There is a need for spelling and grammar consistency; for example, on page 12, under sample characterization, "Considering this information, the presented

data shows that 60% were Female and 40,0 were Male". The same with capitalizing unnecessary words – this need checking throughout. These small errors impact readability.

I would consider whether Table 4 is necessary as its fully explained in the text.

4.3 This needs unpacking, and the presentation of this section needs addressing. Perhaps the table

isn't the best way to present this section to the reader as it's not easy to follow, and the written

section adds little information in its current state. I would advise removing this table and explaining

it succinctly through written text.

With minor changes, I recommend this paper for publication as it will broaden our current understanding of AI and strategic planning and provide useful insights that will offer signposting for future research

Reviewer 2

I enjoyed reading and reviewing your manuscript. It entails a set of interesting contributions.

However, I would like to ask you to make a few changes to improve the early draft:

Please make your abstract attractive to readers (simple sentences without any repetition) and include 2-3 sentences ready to be cited exactly as they are. In 1 paragraph, your abstract should tell the readers why the study is important (maximum 25% of the text), what you did, i.e. your methodology (maximum 25% of the text), and what you found, i.e. main research results and their

major implications (50% of the text). This is very important to promote your work because of the growing trend that authors use Google search to find and cite papers based on the abstract (instead of reading the full paper).

What specific research stream have you found on the TIBR that can include your contribution? how does the paper push the research forward? please, be more explicit on this issue.

The research gap, theoretical contribution, necessity, and importance are not discussed well. Tell your own story based on your own understanding of the extant literature and refer to relevant references. The following references could help you improve the early draft:
(2022). Strategic futures studies and entrepreneurial resiliency: a focus on digital technology trends and emerging markets. *Tec Empresarial*, 16(1), 87-100.
(2022). Sustainability-oriented innovation foresight in international new technology-based firms. *Sustainability*, 14(20), 13501.

(2022). Artificial Intelligence Innovation. In *Managing Innovation in Organizations: Fostering an Entrepreneurial Approach* (pp. 95-105). Singapore: Springer Nature Singapore.

The research methodology might be improved by referring to the following references. Please be more specific about the keyword selection and filtering strategies.
(2020). A systematic literature review on women entrepreneurship in emerging economies while reflecting specifically on SAARC countries. *Entrepreneurship and organizational change: Managing innovation and creative capabilities*, 37-88.
(2020). Sports innovation: A bibliometric study. *Sport Entrepreneurship and Public Policy: Building a New Approach to Policymaking for Sport*, 153-170.
(2022). A systematic literature review of crisis management in and by small and medium-sized enterprises. *Small and Medium Sized Enterprises and the COVID-19 Response*, 1, 38-61.
(2023). Intellectual capital and sustainable startup performance: A bibliometric analysis. *Heritage and Sustainable Development*, 5(1), 19-32.

Compare your findings with those of the others. The authors need to draw substantive conclusions

from their results, suggest implications for theory and practice, and, perhaps, develop recommendations for further research in more detail.

Inform Consent

Investigator:

My name is Daniel Roberto Pinto Mandel Gandrita and I am a Ph.D. candidate at Universidade Europeia. I am inviting you to participate in a research study. Involvement in the study is voluntary, so you may choose to participate or not. I am now going to explain the study to you. Please feel free to ask any questions that you may have about the research; I will be happy to explain anything in greater detail.

I am interested in learning more about Strategic planning. You will be asked to participate in an interview/questionnaire. This will take approximately (35 to 50 minutes) of your time. All information will be kept anonymous and confidential, and the data collection is related to the research topic and I will use a made-up name for you, and I will not reveal details or I will change details about where you work, where you live, any personal information about you, and so forth.

The benefit of this research is that you will be helping us to identify (1) the new pitfalls in planning, (2) what is needed to be rethought in strategic planning and (3) what areas can be introduced or recaptured in this method. This information should help us to give a clearer view on organizational strategic planning and what has added to it during the years. The risks to you for participating in this study are the storage of the acquired data. These risks will be minimized by keeping your and all of your information anonymous and as safe as possible. If you do not wish to continue, you have the right to withdraw from the study, without penalty, at any time.

Participant - All of my questions and concerns about this study have been addressed. I choose, voluntarily, to participate in this research project. I certify that I am at least 18 years of age [or have a signed parental consent form on file with the _____

print name of participant

signature of participant

date

print name of investigator

signature of investigator

date

To the researcher:

Issues to be aware of when obtaining informed consent

Abuse

If a researcher is asking about care-taking practices or observing in a child's home, the researcher would need to indicate what his/her reporting responsibility is in the event of child abuse. Another example might be if the researcher determined that subjects were at risk for harming themselves or others. If the researcher felt bound to notify someone about that risk, subjects should be notified of that obligation when asking for their participation.

Anonymous and Confidential Data Collection

Indicate whether data collection will be (a) anonymous or (b) confidential. The term "anonymous" is used when the investigator collects no identifying information about subjects and, thus, an individual data sheet cannot be connected with a specific subject (by the investigator or anyone else) once the data are collected. As an example, tape-recording, by its very nature, cannot be considered anonymous.

Confidentiality, in contrast, refers to collected data that can be linked to an individual subject. For example, assigning subjects numbers, but then keeping a "key" that links the numbers to

identifying information, is a procedure one might use in order to preserve confidentiality. Not identifying subjects by name or by any other identifying information in reports and presentations also is a measure taken to preserve confidentiality. If individual subject data are used as illustrative examples, you must assure subjects that this will be done in a way that does not allow identification of the participant. Care must be taken to not only not divulge subjects' names, but also other details about them or their experiences that would allow them to be identified. Occasionally, it is important to the research to identify an individual who participated or subjects themselves may wish to have their contribution attributed to them. In such cases, it would be necessary for a participant to sign a release form indicating their willingness to be so identified.

Audio- and Videotaping

If you wish to tape subjects, please include a request to tape explaining the type (e.g. videotaping in the classroom, audiotaping, single or group interviews, etc.), and the disposition of the tape(s) when the study is complete. If the tapes will be used for any other purpose, clearly state the who, where, and why of the other use; if there is no other use of the tape, simply stating that it will be erased when the study is complete is sufficient.

Benefit to the Participant

If it is too strong a statement to say that the subject will benefit from the research, perhaps the better statement would be that the subject may benefit from the research.

Contact Information

Include contact information - a phone number, and/or e-mail address where subjects may reach you. If a student is conducting the study, the advisor's name and phone number should also be provided.

Identifying References

In the event that potentially identifying references need to be included in publications or presentations in order to maintain the basic integrity of the study, the researcher needs to specifically include that fact in the written informed consent statement.

Illegal Activities

Researchers must indicate the limits of the confidentiality. If the researcher plans to ask subjects about their or others' illegal activities (underage drinking, drug use, etc.), the consent form must indicate that the researcher's data can be subpoenaed. The consent forms should include the following sentence: "The researcher is not immune to legal subpoena about illegal activities. Although it is very unlikely, if law enforcement officials asked to see my data, I would have to comply with that request.

Problematic Language

Language used in the informed consent form should be simple and direct.

Use of Minors

The special vulnerability of children makes consideration of involving them as research subjects particularly important. To safeguard their interests and to protect them from harm, special ethical and regulatory considerations are in place for reviewing research involving children. Considerations must be taken of the benefits, risks, and discomforts inherent in the proposed research and to assess the justification in light of the expected benefits to the child-subject or to society as a whole.

Withdrawal from Study

You must state that participation is voluntary and that subjects "may withdraw at any time up until the study has ended." You also must indicate that subjects will not suffer in any way from withdrawing. Wording of this may depend upon the specifics of the study. Examples: (1) If subjects are receiving a service from the agency where the research is occurring, they should be told that they will still continue to receive services even if they decide not to continue participating in the study. (2) If subjects are students in a class or employees in a company, they should be told that their decision to stop participating will not negatively affect a grade or performance evaluation, or participants will be informed on the consent form and by the test administrator that "participation in the study is voluntary and that they can withdraw from participation at any time without penalty.

1.3. Questionnaires

1.3.1. Bridging hierarchy levels for strategic planning: A dynamic capability perspective

- What is your Gender?
- What is your age?
- Working Organization?
- Working Sector
- Economic Size
- Describe how you contributed to your company's strategic planning? How can you contribute in the future?
- How do you describe the relation between the different hierarchical levels in your company?
- Describe a situation that communication did not go as expected in the workplace?
- How do you think communication could have been more effective in that situation?
- Can you recall a situation in which everyone was working their own agenda instead of

working together (from top to bottom)? How do you believe this affect the end result and what could have been done differently to motivate everyone to work towards the same goal?

- Bearing in mind the situation in question 4, what do you believe it was the biggest challenge in reducing the gap between top management and employees?
- Considering the situation described in question 4, do you believe If people make a higher effort to help the organization, top management will feel more open to let everyone participate in important matters?
- Describe how do your relationship with top management, middle management, and low operations in your company?
- Describe a situation which strategic planning did not go as expected, in that case how could it have been more effective and executable in the long term?
- Considering the described situation in question 8, identify constraints that you consider most useful to be solve?
- Describe how important is for you to feel integrated in the team and to contribute to companies strategic planning?

1.3.2. Environmental sustainability for strategic planning effectiveness and organizational improvement

- What is your gender?
- What is your age?
- What is your level of education?
- What is your nationality?
- I believe that believe the inclusion of environmental guidelines in the company's *
strategic planning affects employee.
- I believe that is important is the incorporation of environmental guidelines in the *

company's strategic planning for employee satisfaction and commitment to the company.

- I think environmental guidelines in the company's strategic planning influence employee motivation to stay with the company.
- I believe that believe incorporating environmental messaging into strategic
- planning affects employee retention.
- I believe that pro-environmental behavior among top management influences the implementation of environmentally-focused strategic plans.,
- I believe that the inclusion of environmental considerations in strategic planning affects the intentions of top management to put those plans intoaction
- I believe that incorporating environmental messages into strategic planning impacts the commitment of top management to environmentally sustainable practices.
- I believe that the relationship between environmental messaging in strategicplanning and pro-environmental behavior among top management have an impact on the successful implementation of those plans.
- I believe that providing environmentally sustainable education and training to employees affects the overall sustainability of the company's culture.
- I feel that the encouragement of employees to share their knowledge and best practices on environmental sustainability impact the overall environmentalperformance of the company
- I think that providing environmental sustainability education and training to employees, and encouraging them to share their knowledge and best practices with their colleagues, would lead to a more sustainable corporate culture andbetter environmental performance.
- I believe that me and my colleagues in general are available to work with top management to improve the organization.
- I believe that environmental responsibility practices within the company affect employee retention

- I believe that company's commitment to environmental responsibility impact your motivation to stay with the company.
- Who do you think would be most likely to provide a solution to a problem quickly?
- I believe that the incorporation of environmental guidelines into the company's strategic planning affects employee retention.
- I believe that inclusion of environmental guidelines in the company's strategic planning influences employee motivation to stay with the company.
- I consider that implementation of environmental guidelines in the strategic planning would lead to increased employee retention in the company.

1.3.3. Improving Strategic Planning: The Crucial Role of Enhancing Relationships Between Management Levels

Part. 1 – Quantitative

- What is your Gender?
- What is your age
- What is your nationality?
- What is your level of education?
- What is your management level?
- I believe that including everyone in the organization's strategic planning will contribute to increased competitiveness.
- I believe in the importance of strategic planning and that it should be communicated by my superiors.
- I think planning guidelines should be communicated so that workers can do more effective work.
- I believe that processes in my company need to be less bureaucratic.
- I believe that knowing the intentions of my administrators can condition my way of working.
- I feel that when I am motivated, I can do more for the company.
- I feel that the perks are what keeps me in the company.

- I believe that, if there is encouragement to positive behavior, I perform my function better.
- I feel that if I need specific training to perform my job, the company provides it.
- I feel that is important to encourage employees to share their knowledge and expertise.
- I feel happy and satisfied when we work as a team to achieve our goals.
- I am happy with my career path.
- I feel appreciated for the hard work I do for the company
- I believe that supervisor/manager/manager values my feedback.
- I can see myself working here for another year.
- I believe that I have the opportunity to grow in my company.
- I believe that my job allows me to learn new skills.
- I believe that the more effort me and my colleagues put into helping the organization, higher is the probability for top management to be more open to letting us participate in strategic planning.
- I believe that a good interaction between everyone in the company lead to higher effectiveness when compared to a distant relationship with no attachment between different hierarchy levels.
- I feel that integrating diverse perspectives into strategic planning enhances comprehension and effectivity of the organization.
- I believe that when everyone collaborates in strategic planning can help to improve the organization leading to lead to better results.
- I feel that having environmental guidelines in strategic planning increase my intention to remain in the company.
- I believe that environmentally friendly messages and top management behavior contributes to retention and intention to apply strategic planning.
- I feel that if the company provides me education and training on environmentally friendly actions it promotes better results.
- Who can give you a quicker solution to a problem?
- I' m always willing to help, the
- What do you value most in your company?

Part. 2 – Qualitative

- What is your Gender?
- What is your age?
- What is your nationality?
- Working Organization?
- Working Sector
- Economic Size
- What do you consider essential for the implementation of strategic planning?
- In your opinion, what contributions can your employees make to improve strategic planning?
- Describe your relationship with your peers, department directors and other employees?
- How can you create stronger relationships with the company's employees?
- Which areas most need your attention? What solutions can be used to solve these problems?
- From your perspective, what disruptions can there be in strategic planning? What are the solutions to these disruptions?
- What solutions do you consider viable to overcome resistance to change?
- What factors do you consider indispensable for talent retention?
- What benefits can be made available to employees?

1.3.4. AI Integration and Strategic Planning: Fostering Inclusivity and Strategic Evolution in the Workplace

- What is your Gender?
- What is your age?
- What is your nationality?
- Working Organization?
- Working Sector
- Economic Size

- I believe that AI integration contributes to innovative strategies in organizational strategic planning process.
- I believe that strong management relationships influence the development of innovative strategies in your organization's strategic planning.
- I believe that there is a constant need for AI and management to work in unison to drive strategies that contribute significant value in employee loyalty and retention.
- I believe that resistance to change is a significant issue that has an effect on employee motivation, particularly in AI implementation.
- I believe that employees in their efforts and valued outcomes can be applied in the context of AI integration.
- I believe that enabling, positioning organizations, and individuals for adaptability is one of the foremost challenges facing managers and leaders today.
- I believe in the premise of organizational adaptability in addressing the challenges posed by demanding, challenging, and dynamic environments.
- I believe that the definition of organizational adaptability as the capacity to swiftly pursue new opportunities, avoid complacency, and adjust to new markets.
- I believe that the adaptive process in organizations to introduce artificial intelligence as a system for identifying, interpreting, learning from data, and making inferences foster innovation and productivity.
- I believe that the potential of artificial intelligence contributes to innovation and productivity across a wide range of functions and departments.
- I believe that I share about job displacement and cost reduction associated with the integration of artificial intelligence in organizations.
- I believe that fostering relations that encompass access, positivity, openness, assurances, sharing tasks, and networking has the purpose of organizational adaptability and develop new strategies for market establishment.
- I believe that organizational actors' responses to exogenous shocks contribute to the constant evolution of organizations, leading to sudden and profound changes in stability.
- I believe that organizational resilience as the capacity to survive, grow, and adapt, emerging from challenging conditions more resourceful and strengthened.

- I believe that AI enhances productivity by liberating workers from repetitive tasks, reducing errors, biases, and processing complex datasets to discover new business opportunities.
- I believe that the combination and right application of AI with management relations can aid in crisis navigation and lead to the uncovering of sustainable strategies.
- I believe that AI technologies could sustain a culture of ongoing innovation and strategic planning efforts.
- I believe that organizational culture, defined by beliefs, norms, and values shared with internal stakeholders, significantly influences employee behaviors and company performance.
- I believe that management support encourages the successful implementation of innovative strategic plans in our organization.
- I believe that AI is a technology that stimulates human intelligence, including cognition, perception, decision-making, and action.
- I believe that integrating AI into digital environments can improve effectiveness and work efficiency.
- I believe that management relations with focus on employees and employers, influencing the ability to generate data, knowledge, information, and materials.
- I believe that AI integration and supportive management relationships foster an innovative culture, driving creative strategies for continuous organizational growth.
- I believe that collaborative relationships significantly enhance organizational performance in the context of strategic planning.
- I believe that organizational culture, shaped by beliefs and values, significantly influences employee behaviors and, consequently, the company's performance.
- I believe that organizational culture represents an unwritten, effective part of the company, where success and failure depend on leaders' beliefs and attitudes toward opportunities and constraints.
- I believe that AI, as a technology stimulating human intelligence, can effectively innovate and integrate into digital environments to improve effectiveness and work efficiency.

- I believe that the collaboration between AI and management relations can create a new human-AI hybrid intelligent team mode, optimizing resources and enhancing organizational performance.
- I believe that collaborative management facilitates AI implementation, optimizing resources and enhancing organizational performance.
- I believe that the use of AI technology in organizations creates value for employees and facilitates their career lives.
- I believe that an intentionally designed action plan, guiding and motivating individuals or groups toward specific goals, is essential for increasing effectiveness.
- I believe that AI technologies assist in adapting and evolving strategies within the framework of effective strategic planning and management relationships.
- I believe that enabling a control approach allowing flexibility, adaptability, and information sharing helps employees deal with contingencies and uncertainties.
- I believe that involving everyone in the organizational process for the development of strategic initiatives is crucial, despite concerns about AI replacing jobs.
- I believe that trust -based management relationships, coupled with AI integration, cultivate a positive organizational culture and align with employee goals.
- I believe that the integration of AI technologies positively influences the development of new strategies in the context of effective strategic planning.
- I believe that AI technologies play a significant role in enhancing the effectiveness of strategic planning processes.
- I believe that the integration of AI technologies contributes to the formulation of innovative strategies within organizations.
- I believe that the integration of AI technologies aligns with and supports the goals and objectives set in effective strategic planning.
- I believe that AI technologies contribute for the optimization of resources and the enhancement of organizational performance in the context of strategic planning and management relationships.