

## Application of Strategic Management Tools in Lithuania: Managers' Knowledge and Experience

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*Application of strategic management (SM) tools has been addressed by various researchers. Some of them aimed at defining it, while others discussed the suitability of certain tools for management practices used by specific organisations. The scope of these studies varied from one to several countries. Such variation of research contexts suggests the multidimensional nature of this issue. A number of studies addressed the aspects of SM tools' application in organisations of different types and sizes.*

*This paper discusses the experience of Lithuanian managers in application of various SM tools. Research findings are based on the questionnaire survey aimed at uncovering respondents' views, attitudes towards and experience of application of twelve SM tools in business practice. To ensure statistical comparability the proportion of SME managers was reduced to 89 percent of the entire sample, while SMEs constitute 99.7 percent of all Lithuanian businesses. This enabled us to compare the experience of managers of big companies with that of managers of SMEs.*

*The responses were validated using psychometric statistics and consistency analysis, which enabled achieving relatively high psychometric quality of the results. The structure of the questionnaire and the indicators of the psychometric quality generated by cluster analysis resulted in classification of the SM tools into two relative groups. The latter were subjected to qualitative interpretation taking into account the logical links of the cluster components and the percentage of approval.*

*The questionnaire consisted of semi-open questions. The data they produced was processed using the manifest and hermeneutic content analysis methods. The manifest content analysis revealed the areas of application of specific tools, while hermeneutic content analysis allowed relating managers' responses to specific attitudes towards strategic management. Analysis also revealed the SM tools, which are applied by Lithuanian managers most frequently, and whether they are applied correctly.*

**Keywords:** *tools, strategic analysis, strategic management, strategic planning, strategy.*

### Introduction

Application of SM tools in various countries has been discussed in numerous studies (Webster et al., 1989; Clark and Scott, 1995; Clark, 1997; Miles et al., 1997; Stonerhouse and Pemberton, 2002; Fuentes M. C. et al., 2003; Rigby, 2001a, 2001b, 2005). Various scholars fo-

cused on its different aspects, ranging from development of taxonomies of tools' application to its frequency and satisfaction. Many of these studies gave organisations the tools to select SM tools relevant to their needs.

Webster et al (1989) were among the first to analyse practical application of SM tools. They have developed taxonomy of 30 SM tools and techniques based on nine attributes. This taxonomy included tools and techniques, which can be defined as strategic management tools in a broader context. It covered such aspects as tool relevant data entry definition in terms of content and form, time, human and financial resources, skills and computer resources necessary for tool application. Being one of the first taxonomies of SM tools and techniques, it provided broad range of information on the criteria of tool selection.

Clark developed another taxonomy of SM tools in 1997, even if he did not regard it as taxonomy. Clark and Scott (1995) researched and Clark (1997) later replicated the application of 66 SM tools in the New Zealand and UK companies. Clark (1997) discovered that companies mainly used 33 tools in strategic management and he described them using 32 stages of strategic management process, assigning to each stage five tools used by the surveyed companies for that particular purpose most frequently. This taxonomy was based on the practical application of SM tools at different stages of strategic management process. Clark's taxonomy is similar to that developed by Webster et al (1989) – both of these taxonomies have a defined relationship with the strategic management (planning) process. It should be noted however that these authors use different structures of strategic management process: Clark's view of the process is more detailed, so it can be argued that he expanded the taxonomy developed by Webster et al, at the same time revealing some additional aspects of practical application of SM tools.

Miles et al (1997) studied application of seven strategic planning techniques in the US agricultural sector. Differently from the above-mentioned taxonomies, in this case application of SM tools was compared between agricultural firms and other companies. The established statistically significant differences between tools surveyed by Miles et al (1997) suggest that SM tools can be classified not only by their role in the strategic management or strategic planning process, but also by industry.

Other taxonomy was developed by Rigby (2001a, 2001b, 2005), who has been studying the application of 25 key tools by top managers in various countries. These

tools include a number of SM tools. Since, like in Clark's (1997) case, Rigby's taxonomy was based on the tools' practical application, he classified them based on a certain rating, namely: frequency of tool's application in the surveyed organisations, satisfaction of using it, and effort required for tool's application. Thus, Rigby's taxonomy is distinctive from the others in that he used such 'sophistic' criteria as satisfaction and effort. To some extent 'effort' in this case can be regarded as a category integrating the criteria suggested by Webster et al (1989): time, human and financial resources, skills and computer resources necessary for tool's application.

Summarising the literature review, it can be argued that each of the above-mentioned taxonomies reflects a different context of SM tools' application, which suggests that the need for SM tools may be caused by different reasons.

The current study was aimed at uncovering Lithuanian managers' experience related to application of SM tools and at determining the patterns of this application in Lithuanian organisations.

Research methods used included questionnaire survey and testing of managers using semi-open questions.

### Questionnaire Survey Method: Sample and Research Design

#### Demographic characteristics of the research sample

Questionnaire survey was used to reveal respondents' views and attitudes. Out of 500 copies of the questionnaire 436 were distributed and 216 were returned. The number of valid questionnaires was 212, i.e. the return ratio came to 48.6%, which can be regarded as average.

The working concept of 'managers' included business owners who in many cases are also managers, middle level managers and key specialists.

Out of 210 respondents 30% were owners, 33% top managers and 37% middle level managers and specialists.

95 companies represented in the sample were from the services sector, 47 – from wholesale or retail, 17 – from manufacturing, and 53 were involved in several sectors.

Although the sample included only relatively few manufacturing companies, their proportion reflects the real situation, as there are not many companies in Lithuania engaged in purely manufacturing activities. Despite a relatively smaller number, manufacturing companies are represented in the sample, not least because a few of them were assigned to the category 'other' in case they were also operating in other sectors, e.g. wholesale or retail.

An important characteristic is the number of employees, which is one of the key indicators of the company size in many countries. Figure 1 shows distribution of cumulative frequencies that show the number of employees of the surveyed companies.

One can see from Figure 1 that about 70% of the surveyed companies employ 50 or fewer employees. In order to achieve higher dispersion and comparability of the surveyed attributes, the sample included a larger proportion of big companies and organisation (24 or 11%) than that actually found in Lithuania (0.3%).

Respondents were also asked to classify their companies by size and type, and distribution of their responses is similar to that portrayed in Figure 1: 19% of the surveyed companies were classified as micro-enterprises, 37% as small enterprises, 35% as medium enterprises, and 9% as large enterprises. It should also be noted that respondents' classification of their companies by size was related to the actual classification based on the number of employees and the EU enterprise definition.

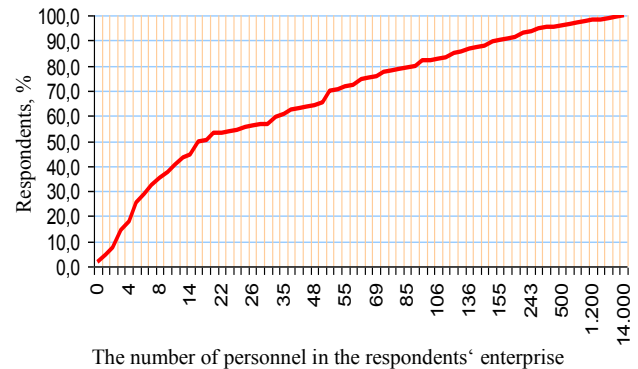


Figure 1. Distribution of the number of respondents by the number of employees in the enterprise, N=204

The measure of contingency between respondents' evaluation and formal classification reached the limit of 0.564. Specifically, Cramers V was calculated. The rate of determination reached the limit of 0.563.

This suggests a rather adequate evaluation of company size and status by respondents. It could be assumed that part of the dispersion unexplained by the coefficient of determination could be explained by the annual turnover. However the questionnaire did not include this question for the sake of confidentiality.

#### Research tool and measured attributes

The questionnaire contained 12 open-ended and 12 close-ended questions related to application of SM tools and managers' knowledge and experience. In addition, extra four open questions were asked. The overall structure (dimensions) of measured attributes is presented in Table 1, which also shows scales and subscales, constructed using factorial validation. In this case, 'dimension', 'scale' and/or 'subscale' are used as synonyms.

Table 1

The Structure of Measured Attributes

Scales and sub-scales	Number of test items
Application of SM tools: managers' knowledge and experience	In total 12 attributes
Application of SM tools	6
Application of strategic analysis tools	6
Ratio of open and closed questions in the questionnaire	
Number of closed questions	12
Number of open questions	12 (+4*)

\* Four questions had an additional open question.

This way of presenting questions and responses has certain advantages. Firstly, it allows diagnosing not only formal knowledge of respondents about strategy, but also its actual application. Secondly, it provides possibilities for open responses and comments, which give indirect indication about knowledge and ability to apply it. Finally, open responses can be processed by content analysis (Šaparnis and Merkys, 2000), whether using quantitative or qualitative methodology.

**1. What is PORTER's 5 FORCES model? If yes, briefly explain this model and the benefits of applying it to business.**

This is the first time I find out about it

I have known about it but I do not have enough knowledge to discuss it

Yes, I have heard about it; PORTER's 5 FORCES model is:

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**Figure 2.** An example of test segment illustrating typical question and response format

To determine the actual application of SM tools by Lithuanian businesses a test was constructed. The classi-

cal test theory is based on dichotomous responses, i.e. either the question has been answered correctly or not. However, for the purposes of this study, this response format was too schematic, therefore a three-stage response format was used allowing a possibility to provide written comment (Figure 2). This kind of test was subjected to factorial validation and control of internal consistency of responses (Table 2).

As one can see from the factor analysis, two theoretically meaningful dimensions – ‘application of SM tools’ and ‘application of analysis tools’ – have been identified. Although both sub-tests were not long, they have a rather high internal consistency of responses, as suggested by Crobach's Alpha coefficients 0.83 and 0.84. Differential capacity of test items is also rather high.

Content analysis of open and semi-open questions allowed assessing and summarising the experience of practical application of SM and analysis tools by managers. Content analysis was conducted in two stages. Firstly, using manifest content analysis the statements were grouped based on similarity, later grouping the most similar statements into sub-categories. In the second stage, we conducted hermeneutic (latent) content analysis of sub-categories and individual attributes and constructed the meaning categories defining the application of specific tools. Content analysis was used to analyse SWOT, Vision, Porter's 5 Forces Model, Product Portfolio, Scenarios, PEST and DELFI tools.

Based on the findings of the study, it can be argued that the tool and the test used in the research are of high methodological quality or, in some cases, at least tolerable.

Table 2

**Application of SM Tools: Managers' Knowledge and Experience, N=212**

Index, sub-scale	Test items	L	i/tt	$\alpha$	$r_{mean}$	$r_{min}$	$r_{max}$	%	KMO
APPLICATION OF SM TOOLS	1. Have you ever heard about company's mission?	0.81	0.725	0.84	0.47	0.26	0.71	49.75	0.85
	2. What is a strategic goal?	0.79	0.724						
	3. What is organisation's management structure?	0.75	0.667						
	4. Have you ever heard about company's vision?	0.73	0.664						
	5. What are strategic alternatives?	0.67	0.606						
	6. What is a management style (TopM)?	0.38	0.356						
APPLICATION OF ANALYSIS TOOLS	1. What is Product Portfolio Matrix?	0.82	0.713	0.83	0.45	0.20	0.67	47.88	0.86
	2. What is PEST analysis?	0.82	0.717						
	3. What is Porter's 5 Forces model?	0.81	0.715						
	4. What is DELFI method?	0.58	0.516						
	5. What is Scenario Model?	0.54	0.496						
	6. Have you ever heard about SWOT analysis?	0.50	0.465						

*L* – Factor; *i/tt* – Corrected Item-Total Correlation (Item-total-correlation);  $\alpha$  – Cronbach's Alpha Based on Standardized Items;  $r_{mean}$  – Inter-Item Correlation, mean;  $r_{min}$  – Inter-Item Correlation, minimum;  $r_{max}$  – Inter-Item Correlation, maximum; % – Extraction Sums of Squared Loadings % of Variance; *KMO* – Kaiser-Meyer-Olkin Measure of Sampling Adequacy.

*Calculating Tool:* The principal analysis of components

The surveyed managers' knowledge and experience with regard to SM tools have been classified using hierarchical cluster analysis. Cluster model featured in Figure 3 was constructed using Ward's method.

### Managers' survey results: knowledge and experience

Cluster analysis showed that tools used by Lithuanian managers in strategic management practice can be classi-

ified by two criteria: 1) management and 2) analysis (Table 2). More detailed analysis of the cluster model (Table 4) suggests that, based on the index mean, it can be divided into two static categories: 1) tools, which are frequently applied and 2) tools, which are rarely applied. It should be noted that, according to distribution of the positive responses, SWOT analysis is more frequently used in strategic management of Lithuanian organisations than analysis of organisation's management structure. For this reason, SWOT analysis appeared in the cluster of strategic management and not that of strategic analysis methods.

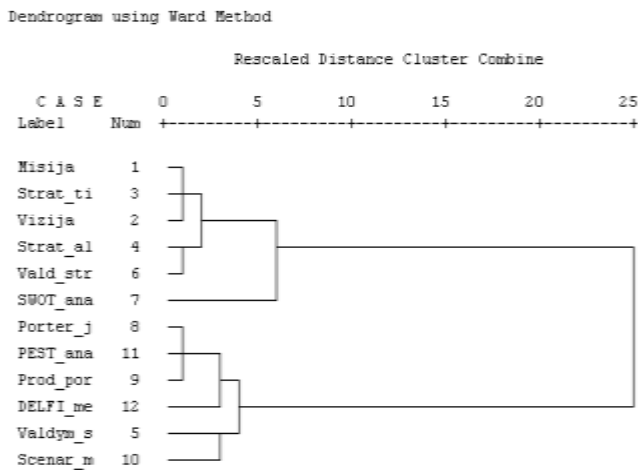


Figure 3. Cluster model of SM methods (variable names are presented in Table 3)

The cluster model suggests that strategic analysis tools are less frequently applied in the strategic management practice. At the same time, based on the literature review and results of this study, it can be argued that SWOT is the most frequently used strategic analysis tool in Lithuania, similarly to the UK and New Zealand. However the possibility of directly comparing application of tools across these countries is limited due to the use of different research methodologies.

Table 3

Abbreviations Used in the Cluster Model

Short title	Full title
Misija	Mission
Strat_ti	Strategic goal
Vizija	Vision
Strat_al	Strategic alternatives
Vald_str	Management structure
SWOT_ana	SWOT (SSGG) analysis
Porter_j	Porter's 5 Forces Model
PEST_ana	PEST analysis
Prod_por	Product Portfolio Matrix
DELFI_me	DELFI method
Valdym_s	Management (TopM) style
Scenar_m	Scenario model

Cluster analysis showed that Lithuanian managers are more familiar with SM tools than with strategic analysis tools (Figures 4 and 5).

As illustrated in Figure 4, over half of the surveyed managers described their experience in relation to vision development (~59%) and strategic goals (~52%). Slightly less than half (~48%) shared their experience in relation to practical application of mission. The least number of the surveyed managers (~14%) told about their experience of applying management style (TopM). Overall, findings suggest that a rather high proportion of managers, when developing organisational strategy, are applying SM tools and that only a small number of managers have never heard about specific SM tools before.

Table 4

Application of Strategic Management and Analysis Tools in Practice (Results of Hierarchical Cluster Analysis, N<sub>managers</sub> = 212)

Cluster/type number		Mean	Type
1	Have you ever heard about company's vision?	2.55	Frequently applied
	What is a strategic goal?	2.48	
	What is organisation's management structure?	2.40	
	Have you ever heard about company's mission?	2.39	
	What are strategic alternatives?	2.20	
	Have you ever heard about SWOT analysis?	2.00	
		<b>2.34</b>	
2	What is a management style (TopM)?	1.82	Rarely applied
	What is Scenario Model?	1.73	
	What is DELFI method	1.66	
	What is Product Portfolio Matrix?	1.61	
	What is Porter's 5 Forces model?	1.57	
	What is PEST analysis?	1.53	
		<b>1.65</b>	

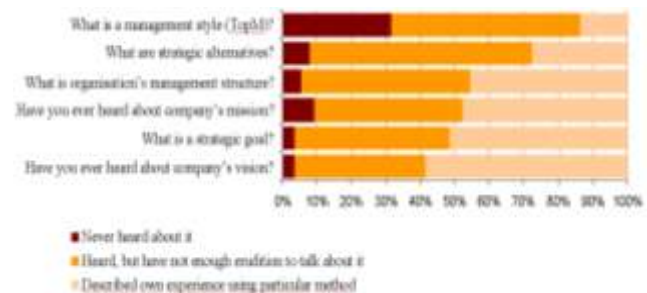


Figure 4. Application of SM tools, work out of separate tasks, percent, N=212

Compared to SM tools, the application of analysis methods, models and techniques is much less frequent (Figure 5), especially application of such methods as PEST (~56%) and Porter's 5 Forces model (~52%). The findings also show that relatively few managers described their experience of using analysis tools. Thus, it can be

argued that analysis in Lithuanian organisations is much less common activity than ‘overall’ strategic management.

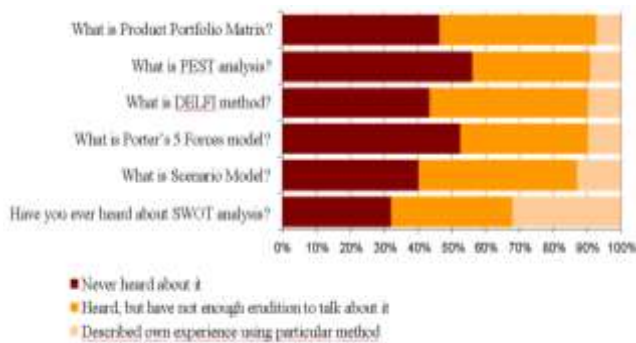


Figure 5. Application of analysis tools, work out of separate tasks, percent, N=212

Summarising the findings of the study, it can be argued that strategic management in Lithuanian organisations is only to low extent based on formal analysis. Intuitive application of SM tools is accompanied by particularly sophistic strategic analysis (not based on hard data). This claim is partly confirmed by high frequency of SWOT analysis application in Lithuanian organisations.

### Strategic management and analysis tools: areas of practical application

Content analysis revealed that Lithuanian organisations often confuse company’s mission with goals and/or vision. This suggests that a number of the surveyed managers use mission either rarely or incorrectly. Relatively few surveyed managers have defined mission correctly, identifying it with company’s role in society. A number of managers defined it as an expression of competitiveness. In one case, a manager expressed his disappointment with mission in these words: *‘nice statement which often has nothing in common with the quality of company’s services, number of clients or sales...’*

To summarise, Lithuanian managers have difficulties with developing organisational mission due to the rather rapid changes in the market and frequent adjustment of their companies’ operation areas. Also, it should be noted that mission is not common in Lithuanian organisations in terms of being a part of company’s identity.

The situation with vision is completely different however. Content analysis suggests that vision was rather often described as an imaginary model of the company or its operation – in quite a few cases vision was identified with the notions of ‘place’ and ‘operation’. In other words, vision was often described as an imaginary positioning of an organisation in relation to space and operation. It was also frequently identified with formal planning procedures, managers regarding it as a step in the planning process. It must be noted that a much larger percentage of managers have correctly described the notion of the vision as opposed to the mission. This may indicate that Lithuanian managers are more concerned with positioning their businesses in the future, which suggests rela-

tive orientation to the process approach<sup>1</sup>. It is based on the view that it is important to know the aims, while the environment will adjust to them.

Content analysis of responses to the question *‘What is a strategic goal?’* further confirmed the assumption about relative preference for the process approach. Some managers tend to focus on one specific goal at a certain point in time, suggesting that the aspired aim is seen as more static than company’s environment.

Analysis of perception of a strategic goal also revealed that a number of managers related it to the formal planning procedures. This suggests that some Lithuanian managers use classical approach to strategy. As it was mentioned, features of formal planning have also been identified in the analysis of mission and vision. Some managers related all these concepts to each other and indicated their logical sequence. However, calling this a classical approach is complicated by a relatively small number of statements indicating company’s focus on profit maximisation, for example: *‘business expansion, growth of financial capacity’*, *‘a goal that company must reach in a certain period of time, e.g. financial goal, position in the market’*. Some statements could be classified as suggesting systemic approach to strategy, e.g. *‘A long-term goal defining organisation’s future and politics. Benefits: clearly defined direction’*. Responses of a number of managers also indicate evolutionary approach to strategy, e.g. *‘a goal which in a certain period of time is a priority goal for the company. The extent of achieving this goal will make a major impact on the other goals of the company (profit, turnover, etc.)’*. Another example: *‘To achieve business development and profitability the goals must be strategic, planned and consistent; only then they will be achieved.’*

To summarise, responses of the majority of managers seem to be representing the process approach to strategy, while other approaches are represented to a lesser extent. However the research sample was not big enough to make claims about clear patterns characteristic to small, medium and large companies. This could be a question for further research.

In terms of the strategic analysis tools, content analysis related to SWOT shows that this method is in most cases perceived as helping to identify company’s strengths, weaknesses, opportunities and threats. This suggests that a number of the surveyed managers referred to the theoretical knowledge of the SWOT rather than its practical application experience while others probably failed to focus on the question, which resulted in a partial and very academic description of this method. Some managers have not clearly defined the SWOT method. Part of them described it as a method used for analysing organisation’s internal environment while others indicated that it is used for analysing the external environment. These statements suggest that although these managers have heard about SWOT, having not applied it in practice they described it only in part. Only a small part of the managers indicated the subject of SWOT analysis.

SME managers have willingly shared their experi-

<sup>1</sup> Based on Whittington’s (2001) four generic approaches to strategy.

ences of practical application of the SWOT method. A rather large number of managers use SWOT for assessing their business competitiveness, and many of these managers reported its everyday use. Some managers use SWOT to analyse their competitors. Content analysis suggests that SWOT is frequently used in the formal organisational planning, which could be explained by Lithuanian SMEs increasingly working on a project basis.

Porter's 5 Forces model was known to relatively few managers and was defined as a method for assessing competitiveness. Although the method is aimed at analysing five forces, some definitions suggest that it overlaps with SWOT analysis, e.g. 'this method is used for identifying company's threats and opportunities under the effect of the following environments: suppliers' and clients' power, threat of substitutes and new competitors, existing competition...'. This can be explained by the fact that the data collected using Porter's model can be further analysed using SWOT.

Product Portfolio Matrix, likewise Porter's model, was identified with company's competitiveness, only in this case in relation to products and their positioning in the market. In some cases managers related it to product positioning in relation to all company's products: 'Relative importance of company's certain products/ services. Benefits: developing certain products, giving up the non-profitable ones'. In other cases it was related to the products on the market: 'All products on the market. It is important to maintain our position in all parts of the matrix in relation to our competitors.' This suggests that Lithuanian managers are rather well informed about the Product Portfolio method.

However a rather low number of responses to this question suggest that this method, likewise Porter's model, is relatively rarely applied in strategic management by Lithuanian organisations.

Scenario model was described by managers as an tool for modelling the expected events and advanced decision-making, e.g. 'a model of forecasted situations', 'simulation of future activities – forecasting of future results: forecast of several future 'scenarios' and their possible results'. Differently from other methods, some managers assigned the scenario model to formal strategic planning, e.g. 'it is recording company's actions related to the future', 'when a certain plan is developed and followed', 'outlining the actions and measures of achieving company's strategic goal'.

Content analysis of PEST descriptions showed that this method, although rarely, is used by Lithuanian organisations in strategic management. Nevertheless, some statements emphasising globalisation suggest that larger companies more commonly apply PEST analysis: 'analysis of political, economic, social, technological and educational trends and challenges in the global and national context.' It should be noted however that in this case a manager is referring to a modified version of PEST adjusted for educational institutions. A rather small number of responses in relation to PEST make it difficult to determine the relationship of PEST application to the company size.

Certain distinctions can be noticed in relation to

managers' description of the DELFI method. Differently from other tools, DELFI method was defined as relevant for decision-making, e.g. 'this is a decision-making method, using which decisions are made by a certain group. Its benefit for organisation is that this group can arrive at the best decision through discussion.' This suggests that some managers have good knowledge about application of the strategic analysis methods. For example, some of them correctly pointed out such details of this method as expert survey by post, advance data collection, etc. ('data is collected from experts by post and later compared several times', 'expert evaluation method; results of questionnaires given to pundits of certain areas are summarised and given to experts to evaluate').

Content analysis of the open questions revealed the ability of Lithuanian managers, including those of SMEs, to use strategic analysis tools on a professional level. At the same time, it can be concluded that managers apply strategic management methods relatively more frequently than strategic analysis methods, although they made mistakes more frequently when defining strategic management methods. One possible way to explain this could be that knowledge gained through general education is not sufficient to engage in effective strategy development.

## Conclusions

1. Findings of the study suggest that strategic management in Lithuanian organisations is to a little extent based on formal analysis. It is characterised by intuitive application of strategic management tools accompanied by especially sophisticated strategic analysis (not based on hard data). This claim is partly confirmed by an especially frequent application of SWOT analysis in strategic management of Lithuanian organisations.
2. Cluster analysis showed that the surveyed tools applied in Lithuanian strategic management practice can be classified based on two relatively theoretically significant criteria: 1) management, and 2) analysis.
3. Based on the index mean, strategic management tools can be classified into the two static categories: 1) those relatively frequently applied in strategic management, and 2) those relatively ignored.
4. Content analysis of the open questions showed the ability of Lithuanian managers, including those of SMEs, to apply strategic analysis methods on a professional level. At the same time, managers tend to use strategic management methods more frequently than strategic analysis methods. This brings to light the paradox as the surveyed managers made mistakes more frequently when defining strategic management methods. One possible way to explain this could be that knowledge gained through general education is not sufficient to engage in effective strategy development.

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### Strateginio valdymo instrumentų taikymas Lietuvoje: vadovų žinios ir patirtis

Santrauka

Šiame straipsnyje aptariama praktinė Lietuvos vadovų patirtis taikant strateginio valdymo instrumentus bei įvertinamos jų pastarųjų instrumentų naudojimo žinios. Ligi šio straipsnio strateginio valdymo instrumentų taikymas tirtas įvairių studijų metu. Vienos jų buvo skirtos instrumentų taikymui apibrėžti, kitos įvertinti konkrečių instrumentų patrauklumui organizacijose vykdomai valdymo praktikai. Dalis šių tyrimų buvo atlikti vienoje šalyje, kitų dėka apžvelgtas instrumentų taikymas bent keliose skirtingose šalyse. Toks tyrimo konteksto kaitaliojimas byloja apie tyrimo problemos įvairialypiškumą. Atlikti tyrimai leido pažinti instrumentų taikymo aspektus priklausomai nuo organizacijos dydžio ir tipo.

Literatūros analizė atskleidė faktą, jog ligi šiol jau sukaupta daug duomenų apie strateginio valdymo instrumentų taikymo praktiką įvairiose šalyse (Webster et. al., 1989; Clark ir Scott, 1995; Clark, 1997; Miles et. al., 1997; Stonerhouse ir Pemberton, 2002; Fuentes M. C. et. al., 2003; Rigby, 2001a, 2001b, 2005). Iki straipsnyje aptariamo tyrimo strateginio valdymo instrumentų taikymo praktika tirta ir apžvelgta įvairiais aspektais: pradedant instrumentų taikymo taksonomijų formavimu ir baigiant instrumentų taikymo dažnumu bei pasitenkinimu tirtose organizacijose. Minėti tyrimai, sudarė galimybės organizacijoms lengviau pasirinkti praktiniam strateginiam valdymui tinkamus instrumentus.

Literatūros apžvalgos rezultatai leido teigti, kad kiekviena aptarta taksonomija perteikia skirtingą strateginio valdymo instrumentų taikymo kontekstą, kurio specifiskumas byloja, jog strateginio val-

dymo instrumentų poreikis gali priklausyti nuo įvairių priežasčių. Šių taksonomijų lyginamoji analizė rodo, kad gali būti ir daugiau priežasčių, lemiančių strateginio valdymo instrumentų pasirinkimą, kurių ligi šiol išskirti neleido tyrėjų naudoti tyrimo metodai. Be to, iki šio tyrimo strateginio valdymo instrumentų taikymas Lietuvos organizacijose nebuvo tirtas, todėl šis tyrimas įgalino pažinti Lietuvos organizacijų gebėjimus taikyti strateginio valdymo instrumentus savo veikloje.

Šio tyrimo tikslas buvo iširti Lietuvos vadovų patirtį taikant strateginio valdymo instrumentus ir nustatyti strateginio valdymo instrumentų taikymo dėsningumus Lietuvos organizacijose.

**Tyrimo objektas** – strateginio valdymo instrumentai.

**Tyrimo metodai:** vadovų anketinė apklausa ir testavimas naudojant pusiau atviro tipo klausimus.

Klausimyne buvo 12 klausimų, atskleidžiančių Strateginio valdymo instrumentų taikymą: vadovų žinias ir patirtį. Visi jie uždaro tipo ir buvo papildyti to paties turinio atvirais klausimais. Taip pat buvo užduoti keturi papildomi atviro tipo klausimai.

Faktinio strateginio valdymo instrumentų taikymo Lietuvos verslo praktikoje tyrimui sukonstruotas specialus testas. Jis skyrėsi nuo klasikinėje testų teorijoje priimtinių testų konstravimo principų tuo, jog sukonstruoto testo atveju pritaikytas trijų pakopų atsakymo formatas, kai trečioje atsakymo kategorijoje numatyta papildoma galimybė atsakymą pateikti raštu. Tokia užduočių ir atsakymų pateikimo forma pasirinkta dėl kelių priežasčių. Pirma, diagnozuotas ne tik formalus respondentų informuotumas apie strategiją, bet ir faktinis jos taikymas. Antra, atsirado galimybė pateikti atvirą atsakymą, komentarą, iš kurio netiesiogiai jau galima spręsti apie žinias ir pasirengimą taikyti strateginio valdymo instrumentus. Galiausiai atviri atsakymai vėliau galėjo būti apdorojami taikant kontentinę analizę. Savo ruožtu kontentinė analizė gali būti atliekama kiekybinės ir kokybinės metodikos priemonėmis.

Sudarytas testas buvo tikrinamas faktoriales validacijos ir atsakymų vidinės konsistencijos kontrolės būdu. Rezultatas – išskirtos dvi teoriškai prasmingos dimensijos – „strateginio valdymo instrumentų taikymas“ ir „analizės instrumentų taikymas“.

Į sudarytą klausimyną įtrauktų atvirų ir pusiau atvirų klausimų kontentinė analizė leido geriau įvertinti ir apibendrinti vadovų strateginio valdymo ir analizės instrumentų praktinio taikymo patirtį. Kontentinė analizė vyko dviem etapais. Pirmajame etape buvo atliekama manifestinė kontentinė analizė. Ją atliekant sugrupuoti teiginiai pagal panašumą. Vėliau panašiausi teiginiai sujungti į subkategorijas. Antrajame etape atlikta hermeneutinė (latentinė) subkategorijų ir pavienių požymių kontentinė analizė ir sudarytos prasminės kategorijos, apibrėžiančios konkrečių instrumentų naudojimą įmonės veikloje. Pasitelkus kontentinę analizę, apžvelgti SWOT, Misija, Vizija, Porterio 5 jėgų, Produktų portfelio, Scenarijų, PEST ir Delfi instrumentai.

Galima teigti, kad pavyko sukurti nuomonių ir nuostatų tyrimo instrumentą bei testą, kurio metodinė kokybė yra aukšta arba atskirais atvejais bent jau toleruotina.

Apklaustų vadovų žinios apie strateginio valdymo instrumentus ir praktinio jų taikymo patirtis klasifikuoti naudojant klasterinės analizės hierarchinį modelį. Klasterinės dendrogramos analizė parodė, kad tirti Lietuvos organizacijų strateginio valdymo praktikoje naudojami instrumentai remiantis respondentų atsakymais gali būti suklasifikuoti pagal du sąlyginus kriterijus: 1) valdymo ir 2) analizės (žr. 2 lentelę). Atliekant detalesnę analizę nustatyta, kad klasterinį modelį pagal indekso vidurkį galima skirti į dvi statistines kategorijas: 1) organizacijos strateginiame valdyme realizuojamus instrumentus ir 2) apleistus.

Sudarytas klasterinis modelis parodė, kad analizės instrumentai rečiau naudojami tirtų organizacijų strateginio valdymo praktikoje. Atlikus tyrimą paaiškėjo, kad daugelis vadovų, formuodami įmonės strategiją, praktiškai taiko strateginio valdymo instrumentus, ir tik nedidelė dalis vadovų apie konkrečius strateginio valdymo instrumentus girdėjo pirmą kartą.

Analizės metodų, modelių ir technikų taikymas palyginti su strateginio valdymo instrumentų taikymu, kur kas labiau atsilieka. Itin daug vadovų pirmą kartą girdėjo apie analizės instrumentus. Tyrimas taip pat parodė, kad tik nedidelė dalis vadovų apibūdino analizės

instrumentų taikymo patirtį. Atlikto tyrimo rezultatai rodo, kad analizės veiksmams Lietuvos organizacijose kur kas labiau apleista sritis nei „bendrai paėmus“ strateginis valdymas.

Atvirų atsakymų kontentinė analizė parodė Lietuvos organizacijų vadovų, taip pat ir MVĮ vadovų, gebėjimą naudoti strateginės analizės instrumentus profesionaliai. Be to, šia analize nustatyta, jog vadovai palyginti dažniau naudoja strateginio valdymo, o ne analizės metodus. Tai patvirtino palyginti didesnis apibūdinusių strateginio valdymo instrumentų naudojimą vadovų skaičius. Vertinant šį teiginį paradoksaliai atrodo kitas faktas – Lietuvos organizacijų vadovai dažniau klydo apibūdindami strateginio valdymo, o ne strateginės analizės metodus. Hipotetiškai tai gali būti paaiškinta tuo, kad bendrojo išsilavinimo žinių sėkmingam įmonės strategavimui nepakanka.

*Atliktas strateginio valdymo instrumentų taikymo tyrimas Lietuvos organizacijose leido daryti šias pagrindines išvadas:*

1. Tyrimo rezultatai parodė, jog Lietuvos organizacijose vykdomas strateginis valdymas yra beveik nepagrįstas formalia analize. Jam būdingas strateginio valdymo instrumentų naudojimas. Šiuos instrumentus taikant intuityviai atliekama itin sofistikuota (formaliais faktais nepagrįsta) strateginė analizė. Šį teiginį iš dalies patvirtina ir ypač aukštas SWOT analizės taikymas Lietuvos organizacijų strateginio valdymo

praktikoje.

2. Iš klasterinės dendrogramos analizės paaiškėjo, kad tirti Lietuvos organizacijų strateginio valdymo praktikoje naudojami instrumentai gali būti klasifikuojami pagal du sąlyginius teoriškai reikšmingus kriterijus: 1) valdymo ir 2) analizės.
3. Analizuojant klasterinį modelį nustatyta, kad pagal indeksų vidurkį strateginio valdymo instrumentus galima skirti į dvi statistines kategorijas: 1) sąlygiškai realizuojamus organizacijos strateginiame valdyme instrumentus ir 2) sąlygiškai apleistus.
4. Atvirų atsakymų kontentinė analizė parodė Lietuvos organizacijų vadovų, taip pat ir MVĮ vadovų, gebėjimą naudoti strateginės analizės instrumentus profesionaliai. Šia analize nustatyta, jog vadovai palyginti dažniau naudoja strateginio valdymo, o ne analizės metodus. Pastarojo teiginio šviesoje paradoksaliai atrodo faktas, kad Lietuvos organizacijų vadovai dažniau klydo apibūdindami strateginio valdymo, o ne strateginės analizės metodus. Hipotetiškai tai gali būti paaiškinta tuo, kad, matyt, vien bendrojo išsilavinimo žinių sėkmingam įmonės strategavimui nepakanka.

Raktažodžiai: *instrumentai, strateginė analizė, strateginis valdymas, strateginis planavimas, strategija.*

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