

Modelling of Strategic Analysis in Strategic Management

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The concept of strategic analysis is understood and defined differently by various authors as well as it is differently positioned in the process of strategic management. Nevertheless, certain logic can be envisaged. In many cases, their conceptions are indirectly related to the context in which they were introduced. The authors who described general principles of strategic management perceived strategic analysis in one way, those who analysed strategic management of small and medium-sized enterprises perceived it in another way and still different perception was held by the authors who analysed strategic planning. Enterprises are very diverse in their possibilities and interests. Some have one employee and are established in the same building where the owner lives; others are multinational companies with tens of thousands of employees and managing property worth billions in several countries. It is obvious that such a situation calls for diversification of strategic analysis in the context of strategic management. Then the question is what the key principles of diversification are, i.e. what determines the choice of strategic analysis model.

This article compares various authors' notions of strategic analysis, highlights their essential differences and suggests an operating concept of strategic analysis in the process of strategic management. The suggested operating process of strategic management was analysed using an opinion and attitude questionnaire. The questionnaire was used to study opinions and attitudes of the managers of organizations of various sizes and activity areas. To achieve statistical significance, the portion of SME managers was reduced to 91 percent, although it comprises 99.7 percent in Lithuania at the moment. In this way the sample of large organizations' managers was created and strategic analysis in SMEs became comparable to strategic analysis in large organizations.

Validity and reliability of answers was assessed using psychometric statistics and answer consistency analysis. The rates of psychometric quality obtained are fairly high or at least tolerable. The structure of the questionnaire and the obtained rates of psychometric quality enabled cluster analysis of the strategic analysis process. Opinions and attitudes of the surveyed managers were classified according to 9-3 cluster models. The developed cluster model was interpreted qualitatively, considering the notional cohesion of cluster components and their rating position.

Qualitative interpretations obtained using cluster model were associated with the operating model of strategic management process in a subsequent stage of the research. In this way changeable and unchangeable

stages of strategic analysis were envisaged. The findings of the research made it possible to identify the essential differences of strategic analysis related to the size of organization and enabled to draw a hypothetical conclusion about possible differences related to the nature of organizational activity.

The developed model of strategic management process not only brings better understanding of strategic analysis, but also enables managers to make decisions on what and to what extent it should be analysed when performing strategic analysis. Moreover, this model makes it possible to partially explain why there has been no consensus on the issues of strategic management process sameness so far.

Keywords: *strategic analysis, strategic management, strategic planning, strategic management process, cluster model.*

Introduction

The literature suggests that a great number of models have been proposed for strategic management (Vasiliauskas, 2005; Analoui and Karami, 2003; Rigby, 2001(a and b); Beal, 2000; Berry, 1998; Jucevicius, 1998; Grant, 1998; Teare *et al*, 1998; Clark, 1997; Rowe *et al*, 1994; Foster, 1993; Johnson and Scholes, 1993; Aram and Cowan, 1990; Thompson *et al*, 1990; Stoner and Fry, 1987; Shuman and Seeger, 1986; Green and Jones, 1982; Linneman, 1980; Porter, 1980) Strategic analysis has different perceptions in strategic management models. Some authors attribute more functions to it (Vasiliauskas, 2005; Analoui and Karami, 2003; Rigby, 2001(a and b); Jucevicius, 1998; Teare *et al*, 1998; Johnson and Scholes, 1993; Thompson *et al*, 1990; Stoner and Fry, 1987) than others (Grant, 1998; Clark, 1997; Rowe *et al*, 1994; Porter, 1980). Jucevicius (1998) suggested the broadest definition of strategic analysis, whereas its narrowest definition was introduced by Clark (1997). Literature analysis leads to believe that the clearest definitions of strategic analysis in the process of strategic management were suggested by Johnson and Schools (1993), Clark (1997), Jucevicius (1998) and Teare *et al* (1998). However, although their concepts of strategic analysis differ from others by their pattern and schematic nature, they are not the same.

Johnson and Scholes (1993) directly associate strategic analysis with developing the strategic situations that are typical to any organization. On the basis of this attitude Teare *et al* (1998) distinguish three main elements of strategic analysis that serve strategic management and

provide objective information to a strategist: on external environment of an organization; on its internal environment, and on culture and expectations of the shareholders (see Table 1.1.1). It should be mentioned that according to Teare *et al* (1998), understanding of organization's strategic position is *strategic analysis*; determination of potential actions, their assessment and choice of the most suitable one is named *strategic alternatives*; and the plan how to energise a chosen strategy and to manage necessary changes is *strategy implementation*.

The notion of strategic analysis by Worrall *et al* (1998) is similar to that of Teare *et al* (1998). Besides, the concept of strategic analysis in the management context by Worrall *et al* (1998) as well as that by Johnson and Scholes (1993) involves internal and external analysis of enterprise environment; however, they differ in that the concept of strategic analysis by Worrall *et al* (1998) does not include the element of organizational culture and shareholders' expectations. Worrall *et al* (1998) specify ten procedural variables of strategic management, the second of which is strategic analysis:

1. establishment of organizational value and main strategic goals;
2. strategic analysis of external and internal environment;
3. processing, interpretation and comparison of strategic analysis findings with core values and goals of an enterprise;
4. distinction and assessment of possibilities;
5. formation of strategic alternatives and choice of priorities;
6. establishment of general developmental trends necessary for the development of other plans and programs;
7. creation of budget and resource allocation plans reflecting priorities;
8. creation of supporting plans aimed at the implementation of strategic goals;
9. implementation of plans and programmes;
10. monitoring, review and activity management as such and as the input of organizational learning process.

Clark (1997) approached strategic analysis and its place in strategic management from a completely different perspective. He developed the sequence of strategic management actions that involves 32 items. The author grouped those items into three activity phases and in this way formed the model of strategic management process. The procedural model differs from those of other authors by the simplicity of actions and logical consistency. Moreover, it is distinctive because the author separated the analysis phase from strategic analysis (see Table 1.1.2). Clark named the first phase 'situation assessment' and attributed to it the core variables such as organization and its environment which is divided into activity environment and remote environment. The second phase of strategic management is called 'strategic analysis' and involves three actions: generation of alternative strategies, assessment of alternative strategies and selection of specific strategy. Clark called the third phase of strategic management 'strategy implementation' and attributed to

it three items: development of action plan; implementation of action plan; and monitoring of strategic activity. Comparing this concept to the previously discussed ones, it can be argued that before Clark's definition of strategic management process, strategic analysis was a part of a broad definition of strategy; yet Clark formulated the concept of strategic analysis so that it fits not only into a broad, but also into a narrow definition of strategy.

Rigby (2001(a, b)) understands strategic analysis from the perspective of management structure in the following way: mission, competitive analysis of external environment and analysis of organizational environment. This concept of strategic analysis essentially does not differ from those by Johnson and Scholes (1993), Worrall *et al* (1998) and Teare *et al* (1998), except that Rigby (2001) gives prominence to the mission when attributing it to a separate phase of strategic planning. When comparing the concepts of strategic analysis by Rigby and Stoner and Fry (1987), it can be noticed that Rigby (2001) as well as Clark and Scot (1995) recommend to study the mission from the perspective of analysis but not from the perspective of activity.

In Lithuania, strategic analysis in the context of management received little attention, with the exception of Jucevicius (1998) who focused his work on strategic analysis. This author reviewed most of the studies on strategic analysis released until 1995 and presents different attitudes towards an integrating concept of strategic analysis. It is worth mentioning the systematic model of analysis developed by Jucevicius (1998).

Jucevicius (1998) associates strategic analysis with assessment of opportunities of external environment and the threats that it poses as well as competition. Therefore the systematic approach to strategic analysis of an organization proposed by him involves all specified elements. Jucevicius's approach is associated with the position of Johnson and Scholes (1993), and yet the approach of the Lithuanian scientist is broader. The mentioned model of strategic analysis by Johnson and Scholes (1993) as well as other models reviewed so far do not reflect the sequence of strategic analysis factors and the model proposed by Jucevicius already has this new advantage. Jucevicius names three main factors that determine strategy in the model: holistic competence of an organization, potential activity conditions (external environment); preconditions for competitiveness. It is possible to state that when developing this model, Jucevicius integrated the concepts used in the works of Porter (1980), Rowe *et al* (1994) and Grafnt (1998).

When comparing his model with the concepts of strategic analysis proposed by Clark (1997) and other above mentioned authors, it can be argued that Jucevicius's model can be regarded as a joined model of Clark and other authors. Its width encompasses all the models of strategic analysis mentioned in the article and largely integrates in itself all the discussed concepts of strategic analysis.

During literature analysis, it was noticed that the models of strategic analysis in strategic management are static in nature, i.e. the models themselves do not anticipate the change in the scope of strategic analysis, although this change may be envisaged indirectly when comparing those models. Strategic analysis in strategic management may be described applying the analogy of

lungs. A human being may breath superficially using only up to 15 percent of lung volume (for example, when sleeping) or he may breath deeply using all lung volume (for example, when doing sports). On the grounds of various authors' works, one may assume that strategic analysis performed in an organization may be based on the principle of lung volume.

The subject of the study – the strategic analysis in the process of strategic management.

The aim of the study was to establish the pattern of change of strategic analysis during the process of strategic management and to name possible reasons for this change.

Methodology of the Study: Research Sample and Tools

Questionnaire method chosen as a research tool is based on the analysis of respondents' opinions and attitudes. 436 questionnaires were disseminated, 216 of which were returned. 4 of them were rejected and 212 were processed. Response rate reaches 48.6 % and may be defined as moderate.

In this context, it is important to define respondents that were recruited to the research sample. Organizations having various activities were surveyed. 95 of them provided services, 47 were in wholesale and/or retail trade 17 dealt with manufacturing, 53 were engaged in mixed activities.

Relatively there are fewer enterprises that deal only with manufacturing. Nevertheless the distribution corresponds to the actual reality as there are relatively few enterprises in Lithuania that are engaged only in manufacturing. Despite this relatively smaller subset of the sample, manufacturing enterprises have their representatives in the sample since a part of manufacturing enterprises were attributed to the category 'other'. The category includes enterprises with mixed activities. Such enterprises deal with both manufacturing and trade.

The number of employees is an important characteristic. Together with annual turnover it is the most important criterion to identify the size of an enterprise in many countries. Figure 1 depicts the distribution of cumulative frequencies that show the number of employees in the enterprises that belong to the sample.

In the process of this study an operational notion of 'managers' was defined. The owners of the above mentioned enterprises who in most cases are executive managers of an enterprise, sometimes hired managers and important specialists of an enterprise, were included into this category of people. In total, the sample of 210 respondents comprised 30% owners, 33% specialists of the top management level and 37% managers and specialists of lower level.

According to the nature of enterprise activity, most SMEs included in the sample were providing services (95 organizations), 47 were engaged in wholesale/ retail, 17 – were engaged in manufacturing, and 53 were engaged in mixed activities.

The distribution reveals that 50 employees fall into approximately the 70th percentage range (percentile). This means that 70% of all investigated enterprises had 50 and less employees. In comparison, 100 employees fall into the 80th percentage range. The limit of up to 10 employees falls into the 40th percentage range. There are no doubts that the

nucleus of the sample is small and medium-sized enterprises make a prevailing group in Lithuania. To achieve greater dispersion and comparability of the surveyed attributes, a small number of large business enterprises and organizations (in total 24) were included into the sample.

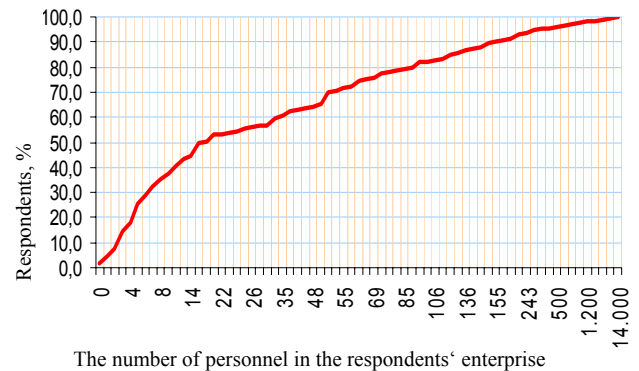


Figure 1. Distribution of the number of respondents by the number of employees in the enterprise, N=204

In the course of study, it was controlled how respondents classified their enterprise according to its size and type. Corresponding distribution meaningfully relates to earlier discussed content of cumulated frequencies schedule. The sample contains about one fifth of micro enterprises (19 %), one third of small and medium-sized enterprises respectively (small – 37 % and medium – 35 %), and the remaining tenth part is large organizations (9%). It is symptomatic that classification of enterprise size indicated by the respondents is related to the actual distribution of enterprises performed by the author on the grounds of specified number of employees and EU enterprise definition. 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 shows that respondents assess the size and status of their enterprise fairly adequately. The assumption may be made that the part of dispersion not explained by the rate of determination could be explained using the rate of enterprise annual turnover. Nevertheless, for the sake of confidentiality, these issues were not dealt with in the questionnaire.

Table 1

Number of Questionnaire Items in Subscales

Scales and subscales	Number of questionnaire items
Managers' attitude to the significance of strategy in business success	In total 36 attributes
Resources	10
Factors determining daily organizational activity	5*
Factors determining long-term organizational success	4
Factors determining organizational success in the activity environment	6
Factors determining impact of remote organizational environment	5
Significance of strategic analysis factors	3
Significance of strategy implementation factors	3

*Including the average of resources

Managers' Attitude to the Significance of Strategy in Business Success, N=212

Indices, sub-scales	Test items	L	i/tt	α	r_{mean}	r_{min}	r_{max}	%	KMO
Organizational resources	1. Analysis and evaluation of product distribution.	0.50	0.59	0.76	0.24	0.1	0.5	25.01	0.78
	2. Analysis and evaluation of human resources.	0.47	0.57						
	3. Continuous concern with non-material property (knowledge, brand, image).	0.48	0.56						
	4. Analysis and evaluation of efficiency of manufacturing operations.	0.47	0.55						
	5. Development of enterprise information system, installation of new data banks and analysis tools.	0.47	0.54						
	6. Analysis of management system and its application to changing environment of an organization.	0.47	0.54						
	7. Encouragement of employees to innovate, creation of appropriate conditions.	0.39	0.44						
	8. Continuous analysis and evaluation of changes in financial resources.	0.37	0.43						
	9. Recognition of abilities significant for enterprise development and their constant development.	0.34	0.38						
	10. Purchase, selling, renovation, change of purpose, etc. of available material resources	0.29	0.34						
Daily (routine) activity of an organization: success factors	1. Organizational resources	0.73	0.60	0.76	0.39	0.2	0.5	40.84	0.75
	2. Analysis of impact of organizational management structure on long-term business success.	0.72	0.60						
	3. Continuous monitoring and evaluation of cultural changes in an organization.	0.63	0.53						
	4. Continuous monitoring of impact of management style on long-term business success of an organization.	0.62	0.54						
	5. Clearly defined structure of an organization and its management.	0.44	0.38						
Factors of organization's long-term success	1. Anticipation and consistent implementation of enterprise's development strategy.	0.69	0.50	0.65	0.31	0.2	0.4	32.84	0.66
	2. Explanation of enterprise's business development goals to employees.	0.64	0.47						
	3. Formulation of mission and vision of an organization (enterprise) and its introduction to all employees.	0.51	0.40						
	4. Setting organizational and business development goals for a period longer than 5 years.	0.41	0.33						
Environment of organizational activity: success factors	1. Analysis of existing and potential markets to expand business opportunities.	0.77	0.60	0.69	0.27	0.1	0.6	31.52	0.75
	2. Analysis and evaluation of changes in the sector.	0.72	0.54						
	3. Competitors' activity analysis to reduce possible threats.	0.60	0.49						
	4. Customer needs analysis in order to preserve existing market segments or to acquire new ones.	0.44	0.35						
	5. Continuous search for key factors that may determine enterprise performance in the future.	0.38	0.32						
	6. Periodical analysis of shareholders' needs, interests and expectations.	0.28	0.25						
Remote organizational environment: success factors	1. Monitoring, analysis and assessment of social changes.	0.79	0.60	0.72	0.34	0.1	0.5	36.42	0.77
	2. Analysis and assessment of enterprise's economic environment.	0.64	0.50						
	3. Analysis and assessment of political events.	0.63	0.51						
	4. Monitoring of legal acts.	0.53	0.48						
	5. Improvement of technologies used by an enterprise, search, acquisition and/or development of new technologies.	0.34	0.30						
Strategic insight as success factor	1. Analysis and assessment of strategic alternatives and selection of the most promising ones.	0.77	0.65	0.77	0.46	0.4	0.6	46.74	0.69
	2. Continuously seeking situations that enable strategic choice.	0.73	0.61						
	3. Formation of strategy optimal to an enterprise.	0.61	0.53						
	4. Continuous efforts to generate strategic ideas.	0.61	0.53						
Factors of strategy implementation	1. Systematic analysis and assessment of strategy implementation.	0.87	0.75	0.85	0.66	0.6	0.7	65.83	0.72
	2. Following the direction indicated in the strategic plan.	0.81	0.72						
	3. The detailed strategic plan is being developed by an enterprise.	0.76	0.69						

The item that was not attributed: analysis of enterprise suppliers of raw materials and sub products..

Questionnaire survey was chosen. A test-questionnaire comprising 168 close-ended and 16 open-ended questions was prepared. 36 close-ended questions were devoted to determine the managers' attitude to significance of strategy in business success. Having processed survey data, the questions were grouped into seven subscales (see Table 1) that subsequently were summarized in the scale *Managers' Attitude to the Significance of Strategy in Business Success*.

In order to reduce the risk that the respondents were not sincere (for example, they systematically provided the answers focused on social expectations), the analysis of answer consistency was performed. Validity and reliability of the survey was evaluated using psychometric statistics (Merkys, 1999a; Rost, 1995; Steyer and Eid, 1995; Lienert and Raatz, 1994; Jovaisa, 1975).

When applying factor analysis and reliability analysis, the subscales developed on the basis of the whole survey were also assessed (controlled). The obtained rates of psychometric quality are sufficiently high or at least tolerable (see Table 2). Cronbach's Alpha Based on Standardized items of the responses was quite high: it varies from 0.65 to 0.86. On the basis of those questions and received answers, scale averages were counted that quantitatively reflect the expression of the named dimensions.

It is purposeful to approach the obtained factorizations not only from the perspective of answers' consistency, but also from the perspective of the content. Factorization of the analyzed group of questions is meaningful from the viewpoint of strategic theory. For instance, the first factor includes attributes (questions) that reflect enterprise resources in one way or another; the third one includes attributes that reflect the factors of long-term success; the fourth reflects the environment of enterprise activity, etc.

Findings

The opinions and attitudes of the surveyed managers were classified using 9-3 cluster models. The results obtained are presented in the dendrogram (see Figure 2). It shows that the process of strategic management in small and medium-sized enterprises splits into three main clusters, each of which can be further subdivided into three clusters. According to the size of a rating value (general cluster average $X_{max} = 3.11$) cluster marked as 1/3 in the dendrogram is named TOP RATING. This cluster covers procedures and stages of strategic management that are popular and more often implemented.

The second cluster according to the size of a rating value (general cluster average $X_{mean} = 2.87$) is formally defined as MIDDLE RATING. This cluster includes procedures and stages of strategic management that are implemented only partially. In the dendrogram the middle rating is marked as 2/3 cluster. The cluster having the smallest size of a rating value (general cluster average $X_{min} = 2.60$) is named BOTTOM RATING. It involves the procedures and stages of strategic management that are relatively rarely used. The bottom rating in the dendrogram is marked as 3/3 cluster.

The developed cluster model was interpreted qualitatively, taking into account the meaning of cluster compo-

nents and their rating position. This implies that three and nine cluster models may be categorized according to the nature of performed actions. Consequently, the following three categories are attributed to a three cluster model:

- 1) Routine (daily) enterprise activity,
- 2) Strategic planning and management (periodic, cyclic enterprise activity) and
- 3) Organization's positioning in a constantly changing environment.

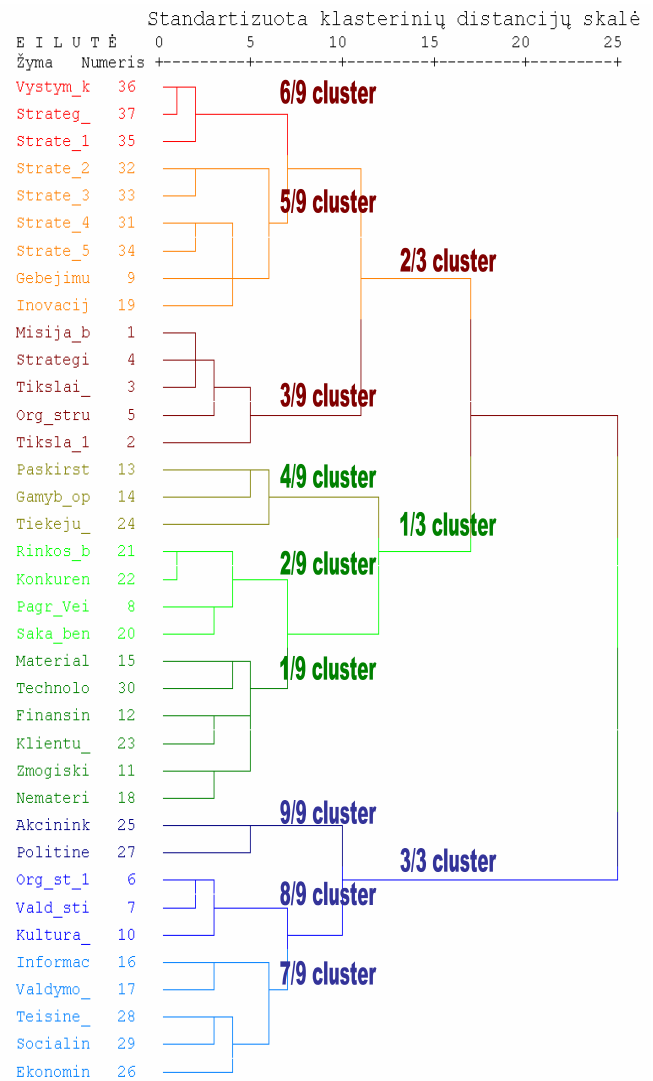


Figure 2. Cluster model of opinions/attitudes to strategic management (explanations of labels are provided in Table 3)

Nine qualitative subcategories that are evenly distributed around qualitative categories of a three cluster model were attributed to a nine cluster model. Consequently, the first category of a three cluster model 'routine (daily) enterprise activity' acquired three subcategories in a nine cluster model: 1) basic daily activity that determines enterprise's competitiveness (1/9 cluster), 2) the means to enhance (establish) short-term competitiveness (2/9 cluster) and 3) the means to sustain short-term competitiveness (4/9 cluster). Having conducted a more detailed subcategory analysis, it is possible to maintain that analysis and assessment of changes in financial resources is most often performed in enterprises (the average of index

reached 3.52 out of 4.00 possible (on the scale from 1 to 4, where 1 stands for unimportant and not performed and 4 stands for very important and performed)). Managers perform customer needs analysis fairly often (3.32) as well as the search for main factors that can determine enterprise performance in the future (3.20). The indices attributed to the third subcategory ‘the means to sustain

short-term competitiveness’ are considered to be less important factors of the category ‘routine (daily) enterprise activity’. The following three indices belong to the subcategory: 1) analysis and evaluation of product distribution channels (2.91), 2) analysis and assessment of the efficiency of manufacturing operations and 3) analysis of enterprise suppliers of raw materials and sub products.

Table 3

Abbreviations Used in the Cluster Model

Abbreviation	Full name	Abbreviation	Full name
Akcinink	Periodical analysis of shareholders’ needs, interests and expectations.	Saka_ben	Analysis and evaluation of changes in the sector.
Ekonomin	Analysis and assessment of enterprise’s economic environment.	Socialin	Monitoring, analysis and assessment of social changes.
Finansin	Continuous analysis and evaluation of changes in financial resources.	Strate_3	Analysis and assessment of strategic alternatives and selection of the most promising ones.
Gamyb_op	Analysis and evaluation of efficiency of manufacturing operations.	Strate_4	Continuous efforts to generate strategic ideas.
Gebejimu	Recognition of abilities significant for enterprise development and their constant development.	Strateg_	Systematic analysis and assessment of strategy implementation.
Informac	Development of enterprise information system, installation of new data banks and analysis tools.	Strate_2	Continuously seeking situations that enable strategic choice.
Inovacij	Encouragement of employees to innovate, creation of appropriate conditions.	Strate_1	The detailed strategic plan is being developed by an enterprise.
Klientu_	Customer needs analysis in order to preserve existing market segments or to acquire new ones.	Strate_5	Formation of strategy optimal to an enterprise.
Konkuren	Competitors’ activity analysis to reduce possible threats.	Strategi	Anticipation and consistent implementation of enterprise’s development strategy.
Kultūra_	Continuous monitoring and evaluation of cultural changes in an organization.	Technolo	Improvement of technologies used by an enterprise, search, acquisition and/or development of new technologies.
Material	Purchase, selling, renovation, change of purpose, etc. of available material resources	Teisine_	Monitoring of legal acts.
Misija_b	Formulation of mission and vision of an organization (enterprise) and its introduction to all employees.	Tiekeju_	Analysis of enterprise suppliers of raw materials and sub products.
Nemateri	Continuous concern with non-material property (knowledge, brand, image).	Tiksla_1	Setting organizational and business development goals for a period longer than 5 years.
Org_stru	Clearly defined structure of an organization and its management.	Tikslai_	Explanation of enterprise’s business development goals to employees.
Org_st_1	Analysis of impact of organizational management structure on long-term business success.	Vald_sti	Continuous monitoring of impact of management style on long-term business success of an organization.
Pagr_Vei	Continuous search for key factors that may determine enterprise performance in the future.	Valdymo_	Analysis of management system and its application to changing environment of an organization.
Paskirst	Analysis and evaluation of product distribution.	Vystym_k	Following the direction indicated in the strategic plan.
Politine	Analysis and assessment of political events.	Zmogiski	Analysis and evaluation of human resources.
Rinkos_b	Analysis of existing and potential markets to expand business opportunities.		

Three subcategories obtained using a nine cluster model also attributed to the second three cluster category: 1) the means of strategy dissemination (3/9 cluster), 2) actions of strategy implementation (5/9 cluster) and 3) strategic planning (6/9 cluster). The discussed category is characterized by a large number of factors related to direct strategy formation, strategy dissemination among enterprise employees and strategy implementation. In the second category, the values of index average range from $X_{max}=3.17$ to $X_{min}=2.65$ (on the scale from 1 to 4). Three indices of the ninth cluster get a fairly low average in this category, which suggests that the stages of formal strategic planning and especially implementation are less often used.

The third three-cluster category is distinguished by a notably low average of the index ($X_{mean} = 2.17$). It is also comprised of three subcategories: 1) factors of enterprise interaction with the remote environment (7/9 cluster), 2) factors of enterprise interaction with the organizational environment (8/9 cluster) and 3) factors of enterprise interaction with the political environment (9/9 cluster). The third category differs from others in that its indices require specific, exceptional attention. According to the author, an exceptional role in this situation is played by small and medium-sized enterprises. As soon as they are involved in routine procedures, it is complicated to control intangible elements such as culture, social, legal and political environments. Since in the majority of cases these enterprise environments are almost uncontrolled, the acceptance of their significance is not high among the surveyed enterprise managers. Besides, it is possible to state that political factor is not important for small and medium sized enterprises due to the two reasons: 1) small number of shareholders enables small and medium sized enterprises to recognize their needs without an additional analysis. It is often the case that the owner and the manager of a micro and small enterprise is the same person. Consequently, the analysis of shareholders' expectations is meaningless; 2) a notably low assessment of political events' analysis was conditioned by the lack of impact of small and medium sized enterprises on the political environment. During the survey it was noticed that the factors that depend on a respondent often were evaluated better, whereas those that indirectly influence him were evaluated worse. Accordingly, having surveyed the managers, politics was positioned at the end of the rating.

To summarize the results of the cluster analysis, it may be stated that a relatively large focus on the routine procedures is typical to small and medium-sized enterprises, whereas focus on strategic management and planning is more typical to large organizations. In the course of study, it became clear that SME may be associated with informal strategic management that is distinguished by a more immediate dissemination of strategy between the strategist and employees, whereas more formal strategic planning is characteristic to large organizations. Finally, it can be maintained that strategic management process of SME is especially weakly oriented to the monitoring and control of organization's strategic management as well as to understanding of organization's remote environment, while this was much more important for large organizations.

Strategic Analysis in the Process of Strategic Management

The performed investigation of strategic analysis application to enterprises enabled to see strategic management in different light. On the one hand, according to the author, there was no ground to propose that strategic management has been an unrecognised sphere until this study. On the other hand, strategic management and analysis in particular has been studied on the level of unified (isolated from size and context) enterprise theory so far. One cannot state that this is wrong. This circumstance allowed gathering relatively many tools to solve the issues of organization's strategic management. Furthermore, it enabled to design some instruments so that they could be applied more widely than it was anticipated in the first version. For example, SWOT tool, used to identify internal advantages and disadvantages as well as external possibilities and threats, later was applied in project, and sometimes in research, activity. Thus a fairly large tool basis allowed providing necessary information to any phase of strategic management process. Eventually, when several discussion trends, attempting to prove that the cumulative standard basis of tools for strategic management and analysis was meant only for a particular organization type, appeared, it was emphasized for a long time that only large organizations are capable of strategic planning, since small and medium-sized enterprises are too small to use such a large amount of existing tools of strategic management. On the one hand, the statement was correct, especially considering time and financial resources possessed by SMEs. On the other hand, the attempt to distinguish only some tools from the whole set designed for a unified organization confirmed the earlier mentioned statement about "disability" of a small and medium sized enterprise in the sphere of strategic management and analysis.

The potential of SME strategic management was highlighted by the managers' opinion survey. Having performed it, the process of strategic management was reconstructed and the model of strategic management process was developed (see Figure 3). Having clustered opinions and attitudes towards strategic management expressed by managers, it was noticed that SME strategic management has some differences compared to a unified model of strategic management¹. When strategic management process was graphically linked to the findings of cluster analysis, the peculiarities of SME strategic management became obvious and they partially denied the statement that due to considerable time and financial costs, small and medium-sized enterprises are too small to use a large quantity of existing tools for strategic management and analysis.

The developed model of SME strategic management enabled to notice that strategic management process occurring in a small and medium-sized enterprise is relatively shorter than that in large organizations. This means that some particular actions related to strategic manage-

¹ Clark's (1997) model of strategic management was chosen as a unified model of strategic management process, since it was designed empirically, involving organizations of various size (including SME) into the research.

ment in a unified organization are not necessary in small and medium-sized enterprises. This is partially related to the number of employees in small and medium-sized enterprises. Here, it is purposeful to note that, for instance, in an individual entrepreneurial enterprise with approximately ten employees and where a manager is an owner, it is not always meaningful to perform a formal analysis of culture, shareholders or their groups, and management style. Moreover, in such an enterprise where there is a direct communication among enterprise employees, formal information or administration system is hardly needed. Another solid argument is that lobbyist interests and the possibility to implement them are expressed less strongly in small and medium-sized enterprises. The latter statement explains why SME managers indicated the analysis of political environment as relatively insignificant. One more argument may be introduced when considering SME managers' opinions and attitudes to the analysis of legal, social and economic environments. These phases of strategic management are considered to be less significant by SME managers for the following reasons; firstly, the smaller an enterprise is, the smaller impact it has on the mentioned environments; secondly, the smaller an enterprise is, the more flexible it is from the perspective of changes occurring in the envi-

ronment.

Thus, it may be stated that a small enterprise can make decisions that could be used to change the direction of its development in the event of serious changes in the remote environment. Consequently, less attention may be paid to the analysis of the remote environment.

Decision making, which enables small and medium sized enterprises to change the direction of their development fairly easily in case of serious changes in the remote environment, partially explains why relatively minor significance was attributed to the phase of strategy implementation. One can maintain hypothetically that being relatively more flexible, small and medium-sized enterprises may change a chosen developmental direction according to their need, whereas large organizations that are characterized by greater inertia of development are forced to search for solutions how to remain in the set developmental direction. Therefore, small and medium sized enterprises that conditionally do not experience loss so often may change their strategy, and large enterprises striving not to experience loss may only adjust the existing strategy. According to the author, precisely due to the named reasons, strategy implementation was given relatively less prominence in the model of SME strategic management.

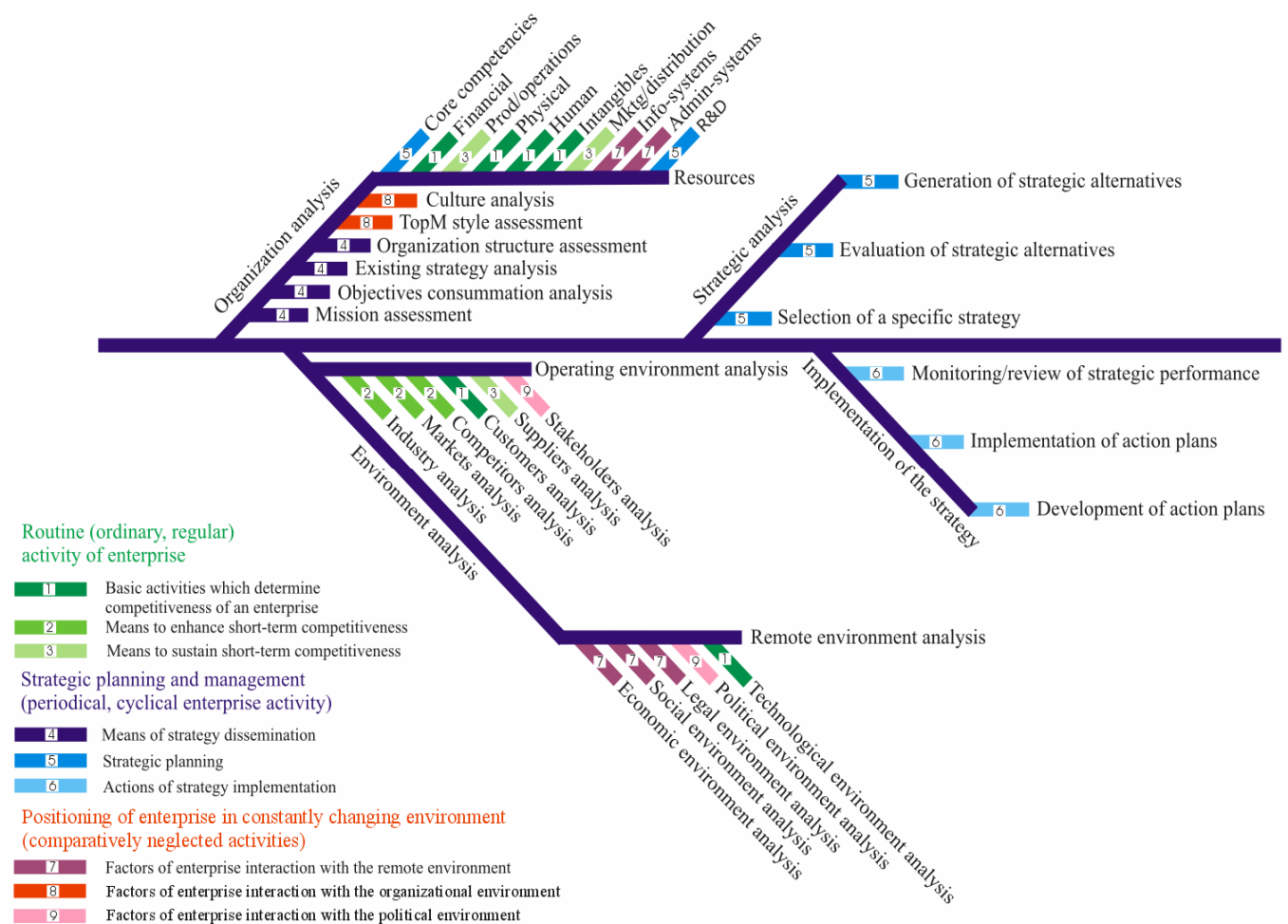


Figure 3. Model of SME Strategic Management

(Developed on the basis of the findings of opinion-attitude clustering and using Clark's (1997) model of strategic management)

Finally, it should be mentioned that when designing a model of strategic management process, the attention was paid to the fact that SME managers emphasized the analysis of core competences. Besides, the analysis of core competences was attributed to the group of organizational resources analysis during factorization. On the grounds of the mentioned circumstances, it was decided to supplement the phase of resource analysis of strategic management with an item of core competence analysis. It should be mentioned that management of core competencies (together with analysis) is conditionally less important for small and medium-sized enterprises than for large organizations. This is due to the fact that when a small enterprise loses an employee, one or even several competencies are likely to be lost. Meanwhile in a large enterprise one competence is often supported by a group of employees and when one of them leaves, the large enterprise does not experience loss in this respect. Therefore, the management of core competences is more important for small than for large enterprises.

To summarize, a conclusion may be drawn that the developed model of strategic management enables not only to know strategic analysis better but also empowers organization managers to make right decisions about what and to what extent needs to be analysed in the process of strategic analysis. Moreover, this model allows a partial explanation why there was no consensus reached on the issues of identity of strategic analysis and strategic management.

Survey findings enabled to see differences of strategic analysis that become apparent when the size of organization changes. When performing the study, it was noticed that analysis may change not only due to the size of an organization. One can state hypothetically that one of criteria when selecting the phases of strategic analysis may be its activity profile. Nonetheless, the pursued survey does not allow stating that, and validation or negation of the hypothesis may be the object of further research into strategic analysis.

Conclusions

The undertaken study enabled to draw the following conclusions:

1. Cluster analysis allowed to state that a relatively high focus on routine procedures characteristic to organization is typical to small and medium-sized enterprises, whereas focus on strategic management and planning is more typical to large organizations.
2. In the course of study, it became clear that SME may be associated with informal strategic management that is distinguished by more immediate strategy dissemination between the strategist and enterprise employees, whereas more formal strategic planning is characteristic to large organizations.
3. Strategic management process of SME is especially weakly targeted at the monitoring and control of organization's strategic management as well as at the understanding of organization's remote environment, while it is much more important for large organizations.
4. The designed model of SME strategic management

suggests that the strategic management process in small and medium-sized enterprises is relatively shorter than that in large organizations. Consequently, some particular actions related to strategic management in a unified organization are not necessary to be performed in small and medium sized enterprises.

5. Decision making, which enables small and medium sized enterprises to change the direction of their development fairly easily in case of serious changes in the remote environment, partially explains why relatively minor significance was attributed to the phase of strategy implementation. One can hypothetically argue that being relatively more flexible, small and medium sized enterprises may change a chosen developmental direction according to their need, whereas large organizations that are characterized by greater inertia of development are forced to search for solutions how to remain in the set developmental direction. Therefore, small and medium sized enterprises that relatively do not experience loss so often may change their strategy, and large enterprises striving not to experience loss may only adjust the existing strategy.
6. When designing a model of strategic management process, the attention was paid to the fact that SME managers emphasized the analysis of core enterprise competences. Besides, the analysis of core competences was attributed to a group of organizational resources analysis during factorization. On the grounds of the mentioned circumstances, it was decided to supplement the phase of resource analysis of strategic management with an item of core competence analysis.
7. The developed model of strategic management not only enables to better understand strategic analysis, but also empowers managers to make the right decisions about what and to what extent needs to be analysed in the process of strategic analysis. Moreover, this model allows a partial explanation why there was no consensus reached on the notions of strategic analysis and strategic management.
8. One can hypothetically argue that one of the criteria when selecting the phases of strategic analysis may be organization's activity profile. However, the conducted survey does not confirm this, therefore validation of this hypothesis may be an object of further research into strategic analysis.

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Sigitas Vaitkevičius

Strateginės analizės modeliavimas strateginiame valdyme

Santrauka

Šiame straipsnyje palyginamos įvairių autorių strateginės analizės sampratos. Pabrėžtina, kad autoriai skirtingai suvokia ir apibrėžia strateginės analizės sampratą bei skirtingai ją pozicionuoja strateginio valdymo procese: vieni jai priskiria daugiau funkcijų (Rigby, 2001(a ir b); Jucevičius, 1998; Teare ir kt., 1998; Johnson ir Scholes, 1993; Stoner ir Fry, 1987), o kiti mažiau (Grant, 1998; Clark, 1997; Rowe ir kt., 1994; Porter, 1980). Plačiausiai iš visų šių autorių strateginę analizę apibrėžė Jucevičius (1998), tuo tarpu atitinkamą sąvoką siauriausiai apibrėžė Clark (1997). Literatūros šaltinių analizės metu nustatyta, kad aiškiausiai strateginės analizės sampratą strateginio

valdymo procese pateikia Johnson ir Scholes (1993), Clark (1997), Jucevičius (1998) bei Teare ir kt. (1998). Pastarųjų autorių strateginės analizės sampratos iš kitų išsiskiria savo struktūra ir schematiškumu, tačiau jos yra nevienodos.

Vis dėlto savitą logiką galima išvėgti. Visų paminėtų autorių sampratos daugeliu atveju netiesiogiai buvo susijusios su kontekstu, kuriame jos pateiktos. Vienaip strateginę analizę vertino autoriai, aprašę bendrus strateginio valdymo principus, kitaip – autoriai, analizavę MVĮ strateginį valdymą, dar kitaip autoriai, apžvelgiantys strateginį planavimą. Kita vertus, įmonės savo galimybėmis ir interesais yra labai skirtingos. Vienos jų turi po vieną darbuotoją ir išsikūrusios tame pačiame pastate, kuriame gyvena jos savininkas, kitos yra multinacionalinės kompanijos, turinčios kelias dešimtis tūkstančių darbuotojų ir valdančios milijardais įkainojamą nekilnojamąjį turtą keliose dešimtyse šalių. Akivaizdu, kad tokia situacija verčia diversifikuoti strateginę analizę strateginio valdymo kontekste, tik kyla klausimas, kokie esminiai diversifikavimo principai arba kas lemia strateginės analizės modelio pasirinkimą.

Literatūros analizės metu pastebėta, kad autorių pateikiamoms strateginės analizės strateginio valdymo procese modeliams būdingas statiškumas, t.y. patys modeliai nenumato strateginės analizės apimties kaitos. Nors šią kaitą netiesiogiai galima išvėgti lyginant minėtų modelių tarpusavyje. Strateginę analizę strateginio valdymo procese galima apibūdinti pritaikius plaučių analogiją. Žmogus gali kvėpuoti paviršutiniškai, išnaudodamas tik iki 15 proc. plaučių tūrio (pvz., miegodamas) arba giliai kvėpuoti, išnaudodamas visą plaučių tūrį (pvz., sportuodamas). Sprendžiant iš įvairių autorių darbų, manytina, kad organizacijoje atliekama strateginė analizė gali remtis tuo pačiu plaučių tūrio principu.

Tyrimo tikslas – nustatyti strateginės analizės kitimo strateginio valdymo procese modelius ir įvardyti galimas šio kitimo priežastis.

Sudarytas darbinis strateginio valdymo procesas buvo tiriamas pasitelkus nuomonių-nuostatų klausimyną. Klausimynu tirtos įvairaus dydžio ir skirtingomis veiklomis užsiimančių organizacijų vadovų nuomonės ir nuostatos. Siekiant statistinio reikšmingumo, MVĮ vadovų dalis tyrime redukuota iki 91 proc., kai tuo tarpu šiuo metu Lietuvoje ji sudaro 99,7 proc. Tokiu būdu pavyko sudaryti didelę organizacijų vadovų lizdą ir užtikrinti palyginamumą tarp strateginės analizės MVĮ ir didelėse organizacijose.

Atsakymų validumas ir patikimumas įvertintas psichometrinės statistikos priemonėmis, atliekant atsakymų konsistencijos analizę. Gauti psichometrinės kokybės rodikliai yra gana aukšti ar bent jau toleruoti. Klausimyno konstrukcija ir gauti psichometrinės kokybės rodikliai įgalino strateginės analizės procesą nagrinėti klasterinės analizės metodu. Apklaustų vadovų nuomonės ir nuostatos klasifikuotos naudojant 9 – 3 klasterių modelius.

Sudarytas klasterinis modelis interpretuotas kokybiškai, atsižvelgiant į klasterio komponentų prasminius sąryšius ir jų reitinginę poziciją. Taigi trijų klasterių modeliui priskirtos trys kokybinės kategorijos:

1. rutininė (kasdieninė, įprastinė) įmonės veikla,
2. strateginis planavimas ir valdymas (periodiška, cikliška įmonės veikla) ir
3. organizacijos pozicionavimas nuolat kintančioje aplinkoje.

Devynių klasterių modeliui priskirtos devynios kokybinės subkategorijos, tolygiai (po tris) pasiskirstančios apie trijų klasterių modelio kokybines kategorijas. Tokiu būdu trijų klasterių modelio pirmoji „rutininė (kasdieninė, įprastinė) įmonės veikla“ kategorija devynių klasterių modelyje įgijo tris subkategorijas: 1) bazinės, įmonės konkurencingumą lemiančios kasdieninės veiklos, 2) trumpalaikio konkurencingumo sustiprinimo (įtvirtinimo) būdai ir 3) trumpalaikio konkurencingumo palaikymo būdai.

Antrajai trijų klasterių kategorijai taip pat priskirtos trys subkategorijos, gautos naudojant devynių klasterių modelį: 1) strategijos sklaidos priemonės, 2) strategijos realizavimo veiksniai ir 3) strateginis planavimas.

Trečioji trijų klasterių kategorija pasižymi itin žemu vidutiniu indekso vidurkiu. Ją kaip ir pirmąsias dvi sudaro trys subkategorijos: 1) įmonės sąveikos su nuotoline aplinka veiksniai, 2) įmonės sąveikos su organizacijos aplinka veiksniai ir 3) įmonės sąveikos su politine aplinka veiksniai. Trečioji kategorija iš kitų išsiskiria tuo, kad į ją patekę indeksai reikalauja specifinio, išskirtinio dėmesio.

Atliktas strateginės analizės taikymo įmonėse tyrimas suteikė galimybę kitoje šviesoje pažvelgti į strateginį valdymą. Viena vertus pusės, iki šio tyrimo nebuvo pagrindo teigti, kad strateginis valdymas yra nepažinta sritis. Kita vertus, strateginis valdymas, o ypač analizė,

iki šiol buvo tiriami unifikuoti (atsietos nuo dydžio ir konteksto) įmonės teorijos lygmenyje. Negalima teigti, kad tai yra blogai. Ši aplinkybė leido sukaupti sąlygiškai daug instrumentų, skirtų organizacijų strateginio valdymo klausimams spręsti. Tokiu būdu sukurta sąlygiškai didelė instrumentų bazė iš esmės leido būtina informacija aprūpinti bet kurį strateginio valdymo proceso etapą. Ilgainiui, pradėjus formuoti kelioms diskusinėms kryptims, besistengiančioms įrodyti, kad sukaupta strateginio valdymo ir analizės instrumentų norminė bazė skirta tik konkrečiam tipui organizacijų, ilgą laiką buvo akcentuojama, kad strategiškai planuoti sugeba tik didelės organizacijos, kadangi mažos ir vidutinės įmonės yra per mažos panaudoti tiek daug egzistuojančių strateginio valdymo instrumentų. Viena vertus, išsakytas teiginys buvo teisingas, ypač pažiūrėjus į MVĮ turimus laiko ir finansinius išteklius. Kita vertus, bandymas išskirti tik kai kuriuos instrumentus iš viso jų rinkinio, skirto būtent unifikuotai organizacijai, lyg ir patvirtino anksčiau jau išsakytą teiginį apie mažos ir vidutinės įmonės sąlyginį „neįgalumą“ strateginio valdymo ir analizės srityje.

MVĮ strateginio valdymo potencialą išryškino vadovų nuomonės tyrimas. Jį atlikus rekonstruotas strateginio valdymo procesas ir sudarytas strateginio valdymo proceso modelis. Klasterizavus vadovų pareikštas nuomones ir nuostatas į strateginį valdymą, pastebėta, kad MVĮ strateginio valdymo procesas turi sąlygiškų skirtumų, palyginti su unifikuoju strateginio valdymo proceso modeliu². Grafiškai sujungus strateginio valdymo procesą su klasterinės analizės metu gautais rezultatais, akivaizdžiai išryškėjo MVĮ strateginio valdymo proceso ypatumai, iš dalies paneigiantys teiginį, kad mažos ir vidutinės įmonės dėl sąlygiškai didelių laiko ir finansinių kaštų yra per mažos panaudoti daug egzistuojančių strateginio valdymo ir analizės instrumentų.

Apibendrinant tyrimo rezultatus galima teigti, kad :

1. Mažoms ir vidutinėms įmonėms būdingas sąlygiškai didelis susitelkimas į rutines organizacijai įprastines procedūras, tuo tarpu didelės organizacijos – labiau į strateginio valdymo ir planavimo dedamąją.
2. Su MVĮ samprata gali būti siejamas neformalus strateginis valdymas, pasižymintis labiau betarpiška strategijos sklaida tarp stratego ir įmonės darbuotojų nei kur kas formalėsiu strateginiu planavimu, būdingesniu didelėms organizacijoms.
3. MVĮ strateginio valdymo procesas itin silpnai orientuotas į organizacijos valdymo stebėseną ir kontrolę bei į nuotolinės organizacijos nekontroliuojamos aplinkos pažinimą, tuo tarpu didelėms organizacijoms tai buvo kur kas svarbiau.

4. Mažoje ir vidutinėje įmonėje vykstantis strateginio valdymo procesas yra sąlygiškai trumpesnis nei didelėse organizacijose. Tai reiškia, kad mažose ir vidutinėse įmonėse nėra būtina atlikti kai kurių konkrečių, su strateginio valdymo procesu unifikuoju organizacijoje susijusių, veiksmų. Tai iš dalies yra susiję su darbuotojų skaičiumi mažose ir vidutinėse įmonėse.
5. Sprendimų priėmimas, kurių dėka mažos ir vidutinės įmonės nesunkiai gali keisti savo raidos kryptį, įvykus rimtiems nuotolinės aplinkos pokyčiams, iš dalies paaiškina, kodėl sąlygiškai mažesnė reikšmė buvo teikiama būtent strategijos įgyvendinimo etapui. Galima hipotetiškai teigti, kad mažos ir vidutinės įmonės, būdamos sąlygiškai lankstesnės, gali sau leisti keisti pasirinktą raidos kryptį pagal poreikį, o didelės organizacijos, pasižyminčios didesniu vystymosi inertškumu, yra priverstos ieškoti sprendimų, kaip išlikti užsibrėžtoje raidos kryptyje. Vadinasi, mažos ir vidutinės įmonės, palyginti dažniau nepatirdamos nuostolių, gali keisti strategiją, o didelės įmonės, siekdamas nepatirti nuostolių, gali tik koreguoti turimą strategiją.
6. Sudarant strateginio valdymo proceso modelį, atkreiptas dėmesys į tai, kad MVĮ vadovai akcentavo esminių įmonės kompetencijų analizę. Be to, esminių kompetencijų analizė faktorizacijos metu buvo priskirta organizacijos išteklių analizės blokui. Remiantis įvardytomis aplinkybėmis, buvo apsispręsta strateginio valdymo proceso išteklių analizės etapą papildyti esminių kompetencijų analizės žingsniu.
7. Sudarytas strateginio valdymo proceso modelis leidžia ne tik geriau pažinti strateginę analizę, bet ir įgalina organizacijų vadovus teisingai apsispręsti, ką ir kiek reikia analizuoti atliekant strateginę analizę. Be to, šis modelis leidžia iš dalies paaiškinti, kodėl iki šiol nebuvo pasiekta konsensuso strateginės analizės ir strateginio valdymo proceso tapatumo klausimais.
8. Hipotetiškai galima teigti, kad vienas iš strateginės analizės etapų atrankos kriterijų gali būti ir jos veiklos profilis. Vis dėlto atliktas tyrimas to teigti neleidžia, todėl pastarosios hipotezės patvirtinimas ar paneigimas galėtų būti tolimesnių strateginės analizės tyrimų objektas.

Raktažodžiai: *strateginė analizė, strateginis valdymas, strateginis planavimas, strateginio valdymo procesas, klasterinis modelis.*

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² Unifikuoju strateginio valdymo proceso modelio pavyzdžiu pasirinktas Clark (1997) strateginio valdymo proceso modelis, kadangi jis buvo sudarytas empiriškai, į tyrimą įtraukiant įvairaus dydžio organizacijas (tarp jų ir SVV).

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