

# The Role and Importance of Strategy Workshops

Findings of a UK Survey



Professor Gerard P. Hodgkinson, University of Leeds  
 Professor Gerry Johnson, University of Strathclyde  
 Professor Richard Whittington, University of Oxford  
 Dr Mirela Schwarz, University of Southampton

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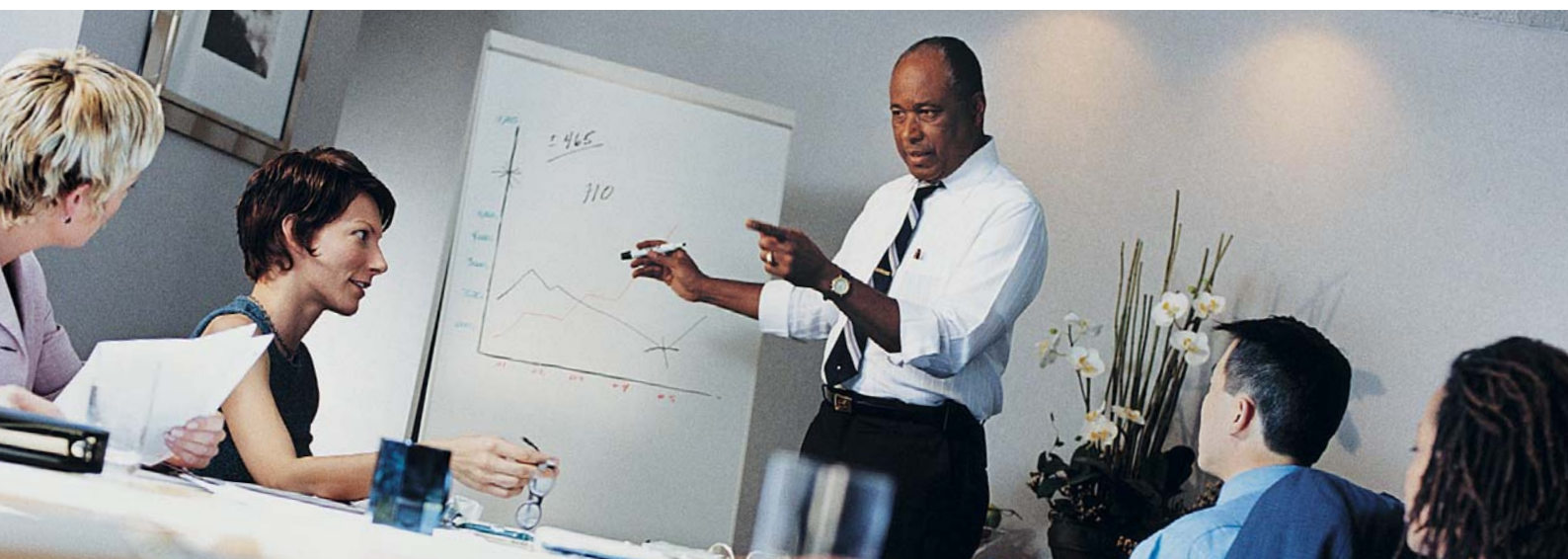
## Introduction

Twenty years ago strategy was synonymous with formalised strategic planning. Nowadays, although strategic planning systems still exist in organisations, they are not seen as the main or only vehicle through which strategies actually develop. It is recognised that other managerial processes play an important role.<sup>1</sup>

One of those processes is strategy workshops or away days and it seems that these have become very commonplace. They typically take the form of managers taking time from their everyday tasks to consider the strategic situation facing the organisation and how they might best move forward.

Although there has been much research into traditional strategic planning systems, we know very little about strategy workshops. Indeed at the start of the project summarised in this report we found that even basic information, such as how often these workshops take place, which types of organisation undertake them, who goes on them, the perceived effectiveness of these events, and so on, is simply not known. So here we have a common phenomenon, supposedly influencing the strategy development of organisations, about which we know virtually nothing. In the absence of such information how can organisations improve the practice of strategy workshops, developing individuals to play an effective role in these events? The project reported here was undertaken to help address this major shortfall in our knowledge of this sphere of management practice.

Our study constitutes the first ever attempt to establish a better picture of what goes on at such workshops and their effectiveness. The findings provide a number of key insights into the scale and scope of these activities and the extent to which and in what ways they help contribute to the effective development and implementation of strategies in organisations.





## Research Method

In the summer of 2004, AIM Fellows Gerard Hodgkinson and Gerry Johnson, working together with Richard Whittington of the Saïd Business School at Oxford University and Mirela Schwarz of the University of Southampton approached the Chartered Management Institute (the Institute) with a view to collaborating on a postal survey to gather this type of basic data. A survey was designed jointly between the researchers and the Institute and was distributed via the Institute to a stratified random sample of 8000 of its members, drawn across all management levels, sectors and size of organisation.

- A total of 1,337 returns were received, a response rate of 16.71%<sup>ii</sup>;
- The sample is roughly evenly divided between not for profit and public sector organisations (42.8%) and for profit organisations (57.2%);
- The sample is also fairly evenly divided in terms of organisational size (number of employees): ≤ 250 = 39.3%; 251-5000 = 31.4%; over 5000 = 28.9%;
- As shown in Tables 1 and 2 respectively, there is a wide cross-section of sectors and management functions represented in the sample, but, in keeping with the composition of the Institute membership, the sample is weighted toward general management functions;
- The sample of completed questionnaires is also somewhat more weighted toward director (30.7%) and senior (45.7%) managerial levels, just 22.4% drawn from other ranks;
- In total, 301 (22.5%) of the respondents are female; lower than that in the general population of UK managers.<sup>iii</sup>

**Table 1. Sample broken down by sector.**

Sector	%
Central/local government	15.1
Education	11.4
Other business services	10.1
Manufacturing	7.6
Health/social work	7.3
Engineering	7.1
Uniformed/emergency services	6.6
Construction	4.7
Banking/insurance/finance	4.3
Computer/IT services	3.8
Utilities	3.0
Transport	1.6
Retail	1.4
Sales/marketing/advertising	1.3
Other	14.3

**Table 2. Sample broken down by management function.**

Function	%
General management	31.5
Management consultancy	10.2
Production/operations	9.3
Administrative/management services	8.9
Business development	7.7
Finance/accounting	3.8
Marketing/sales	3.4
Personnel/HR	3.4
IT/computing	3.3
Facilities management	1.9
Purchasing/contracting	1.2
Corporate affairs/public relations	1.1
Miscellaneous	15.6



## Key Findings

The results of our survey confirm that strategy workshops are indeed a common practice, often involving very senior managers and that such deliberations feed directly into the strategy development process of organisations.

Almost half (44.8%) of our sample reported that strategy workshops occur within their organisations at least once per year, 15.4% reported an occurrence once every 2 years, while 14.7% reported occasional use of workshops (once every 3-4 years) and 22.7% stated that such workshops never occur in their organisations, based on analysis of 1305 valid responses (i.e. the total number of participants who answered the relevant question)<sup>iv</sup>.

As shown in Table 3, there is evidence to suggest that the annual turnover of organisations is associated with how often strategy workshops occur. The results indicate that they are more frequent in large organisations, as measured by turnover.

As might be expected, there is a strong association between managerial level and the extent of participation in workshops, senior managers and directors being significantly more likely to report higher levels of involvement in comparison with their junior counterparts.<sup>v</sup> In total, 28.89% of directors report no experience of such workshops, compared with 33.2% of senior managers and 47.1% of junior managers. Conversely, 60% of directors take part in such events very regularly (i.e. at least once per year) compared with 49.4% of senior managers and 35% of junior managers.

**Table 3. Crosstabulation of frequency of occurrence of strategy workshops by annual turnover of organisations**

How often do strategy workshops occur in your organisation?					
What is the annual UK turnover of your organisation?	Never	Occasionally (once every 3-4 years)	Regularly (once every 2 years)	Very regularly (at least once per year)	Total
Up to £1m	9.2%	1.9%	1.7%	5.8%	18.6%
£1m – £10m	4.6%	2.8%	2.6%	8.0%	18.0%
£11m – £100m	4.4%	4.3%	3.5%	10.2%	22.5%
£101m – £500m	2.4%	1.9%	3.1%	8.4%	15.9%
Over £500m	2.6%	4.0%	4.8%	13.6%	25.0%
<b>Total</b>	<b>23.2%</b>	<b>15.2%</b>	<b>15.7%</b>	<b>46.0%</b>	<b>100.0%</b>

### Purposes of Workshops

As shown in Tables 4 and 5 respectively, the purposes of workshops and the triggers or reasons for holding them are many and varied. Approximately two-thirds of the sample indicated that workshops are part and parcel of their organisations' regular strategy development processes. Other common reasons include organisational development purposes (such as team building) and changes to the organisational structure. It is clear from the data presented in Tables 4 and 5 that very few workshops seem to be crisis-driven, the overwhelming majority being triggered by developmental needs. The major purpose is to challenge/question strategy or come up with new ideas.<sup>vi</sup>

## Format of Workshops

In order to gain a sense of what actually takes place in strategy workshops, we asked respondents to reflect upon the most recent workshop they had attended. The overwhelming majority of respondents (78%) reported that they were regular participants, as opposed to facilitators (16.2%) or had some other role (5.1%), based on a total of 861 valid responses.

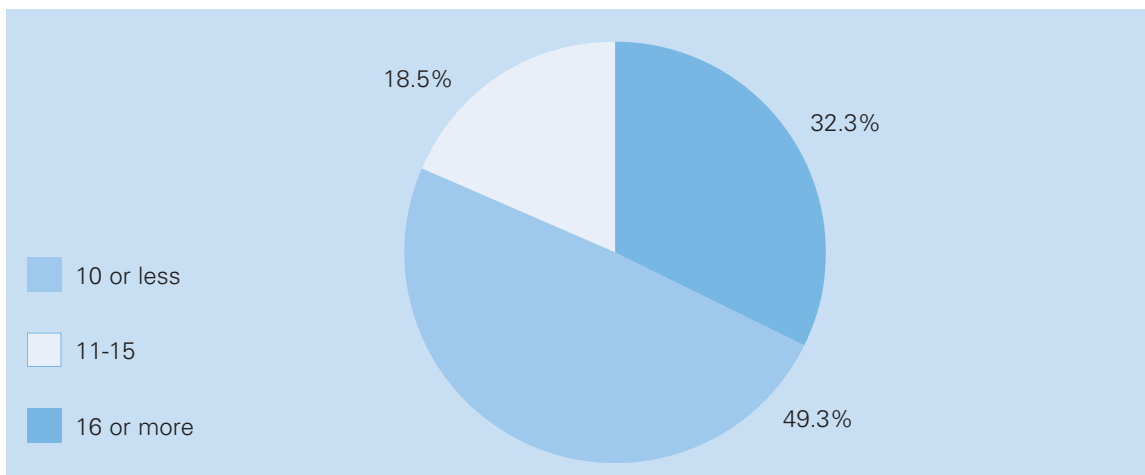
As shown in Figure 1, roughly half of the respondents reported that the most frequent workshop they had attended involved 10 participants or less, suggesting that the majority of these events involve relatively small numbers of individuals. There are few discernible links between the number of participants and the purpose(s) of the workshop, as shown in Table 4, except that the larger events appear to be more concerned with achieving the implementation of strategy (examining blockages, achieving buy-in and communicating strategy).

**Table 4. Purpose(s) of the workshop broken down by number of participants (percentages are based on valid returns within columns).**

Purpose(s)	10 or less participants (401 valid responses)	11-15 participants (152 valid responses)	16 or more participants (266 valid responses)
Generate new ideas and solutions	197 (49.1%)	66 (43.4%)	132 (49.6%)
Reconsider or challenge existing strategy	185 (46.1%)	77 (50.7%)	141 (53%)
Formulate new strategy	163 (40.6%)	38 (25.0%)	74 (27.8%)
To undertake strategic analysis as a contribution to strategy development	140 (34.9%)	59 (38.8%)	102 (38.3%)
Plan implementation	132 (32.9%)	61 (40.1%)	88 (33.1%)
Communicate strategy	75 (18.7%)	54 (35.5%)	96 (36.1%)
Monitor progress of a strategy	71 (17.7%)	27 (17.8%)	53 (19.9%)
Achieve buy-in to a strategy	69 (17.2%)	50 (32.9%)	75 (28.2%)
Examine blocks to implementation	68 (17.0%)	41 (27.0%)	68 (25.6%)
Skill and capability development of attendees	65 (16.2%)	35 (23.0%)	68 (25.6%)

**Table 5. Responses to the question: 'What was the trigger or cause for holding the last strategy workshop you attended? (Please tick all that apply)'**

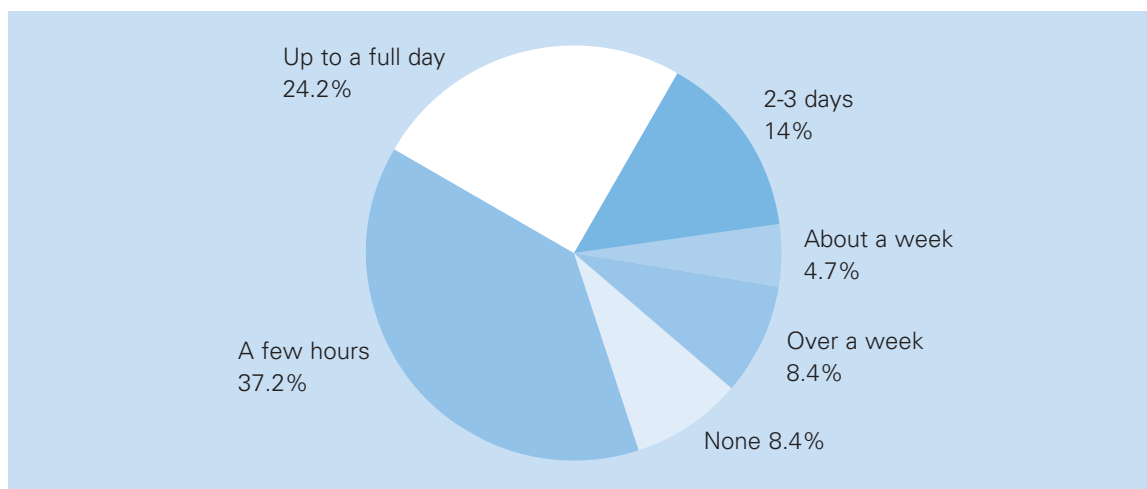
	%
Part of the regular strategy development process	62.6
Organisational development needs (e.g. teambuilding)	35.8
Change in organisational structure	29.3
Increased competitive activity	10.3
Downturn in company performance	7.1
Technological change	7.1
Change in management team	15.0
Takeover or threatened takeover	1.4
Other	9.8



**Figure 1. Number of participants in most recent workshop.**

### **Preparation for Workshops**

As shown in Figure 2, the amount of time spent on preparation for workshops is quite limited, suggesting that the majority of participants rely on their existing managerial experience as opposed to systematic preparation when attending these events. Only 22.8% invest two or more days in preparation. At the other extreme, over half of the regular participants (53.7%) invest a few hours (43.8%) or no time at all (9.91%) in preparation. However, a different pattern emerges when the data are compared directly across participants and facilitators. More than half (55.1%) of those adopting the role of facilitator spent at least 2-3 days or more in preparation. Only 13.4% of facilitators spent a few hours in preparation, 2.17% no time at all. The proportions of facilitators and regular participants are roughly equal in terms of those spending up to a full day in preparation (29.7% vs. 23.5% respectively). As can be seen from Table 6, it does not appear that participants prepare more for strategy workshops dealing with formulating new strategy as opposed to planning implementation. However it would seem that strategy workshops oriented towards generating new ideas and solutions and/or the reconsideration/challenging of existing strategy entail considerably more preparation than workshops that monitor the progress of a strategy.



**Figure 2. Total time spent in preparation for the most recent strategy workshop attended.**

**Table 6. Purpose(s) of the workshop broken down by amount of preparation (percentages are based on valid returns within columns).**

Purpose(s)	None (67 valid responses)	A few hours (317 valid responses)	Up to a full day (206 valid responses)	2-3 days (122 valid responses)	About a week (38 valid responses)	Over a week (70 valid responses)
Generate new ideas and solutions	31 (46.3%)	152 (47.9%)	100 (48.6%)	55 (25.1%)	25 (65.8%)	34 (48.6%)
Reconsider or challenge existing strategy	26 (38.8%)	148 (46.7%)	110 (53.4%)	61 (50.0%)	21 (55.3%)	38 (54.3%)
Communicate strategy	23 (34.3%)	78 (24.6%)	53 (25.7%)	33 (27.0%)	12 (31.6%)	27 (38.6%)
To undertake strategic analysis as a contribution	18 (26.9%)	115 (36.3%)	71 (34.5%)	55 (45.1%)	15 (39.5%)	27 (38.6%)
Plan implementation	18 (26.9%)	99 (31.2%)	78 (37.9%)	41 (33.6%)	16 (42.1%)	31 (44.3%)
Formulate new strategy	16 (23.9%)	106 (33.4%)	70 (34.0%)	49 (40.2%)	15 (39.5%)	21 (30.0%)
Achieve buy-in to a strategy	14 (20.9%)	70 (22.1%)	50 (24.3%)	31 (25.4%)	10 (26.3%)	21 (30.0%)
Examine blocks to implementation	14 (20.9%)	58 (18.3%)	53 (25.7%)	30 (24.6%)	8 (21.1%)	13 (18.6%)
Skill and capability development of attendees	14 (20.9%)	58 (18.3%)	46 (22.3%)	23 (18.9%)	13 (34.2%)	14 (20.0%)
Monitor progress of a strategy	10 (14.9%)	55 (17.4%)	37 (18.0%)	26 (21.3%)	9 (23.7%)	14 (20.0%)

### Duration and Location

Our results indicate that the overwhelming majority of workshops (90%) are of short duration, that is two days or less, and held off-site (73%), either in-house but not at the respondent's regular place of work (21.8%) or at a hotel or other venue (51.2%).

Almost half of these workshops (44.3%) are one-off events, as opposed to one of a series on the same theme, either attended by a common group of participants (32.8%) or different participants on each occasion (18.9%).

Well over half (62.5%) of respondents indicated that their organisation has a formal strategic planning process and, in response to a question asking whether the workshop they last attended was intended either to provide input to, a consequence of, or unrelated to that system, 41.3% saw it as an input, 22.4% a consequence, while only 8.6% did not see any connection. In other words, strategy workshops are generally part of an ongoing strategic planning process.

### Workshop Processes and Activities

The overall pattern of findings emerging from the above analyses suggests that strategy workshops are regular events linked to formal strategic planning systems. We also asked a series of questions concerning what actually goes on during these events.

As shown in Figure 3, a substantial majority of workshops (61.1%) are led by senior directors (including the Chairman or Chief Executive Officer). Relatively few are led by other internal members of staff (such as members of the HR function or line managers) or external consultants.

The data presented in Table 7 suggest that a wide cross-section of stakeholders might well attend some workshops, but more typically they are populated by senior managers and executive directors (and to a lesser extent middle management and line managers). Significantly, customers and suppliers, the major external stakeholder groups of virtually all organisations, are rarely involved in these events.

We also asked respondents to indicate how far they agreed that the objectives of the workshop had been clearly communicated, using a five-point response scale. The vast majority (79.8%) agreed or strongly agreed that this was the case. However, there are also indications of a tendency among facilitators to respond on average slightly more positively (mean = 4.19; SD = 0.912) than participants (mean = 3.90; SD = 0.834).<sup>vii</sup>

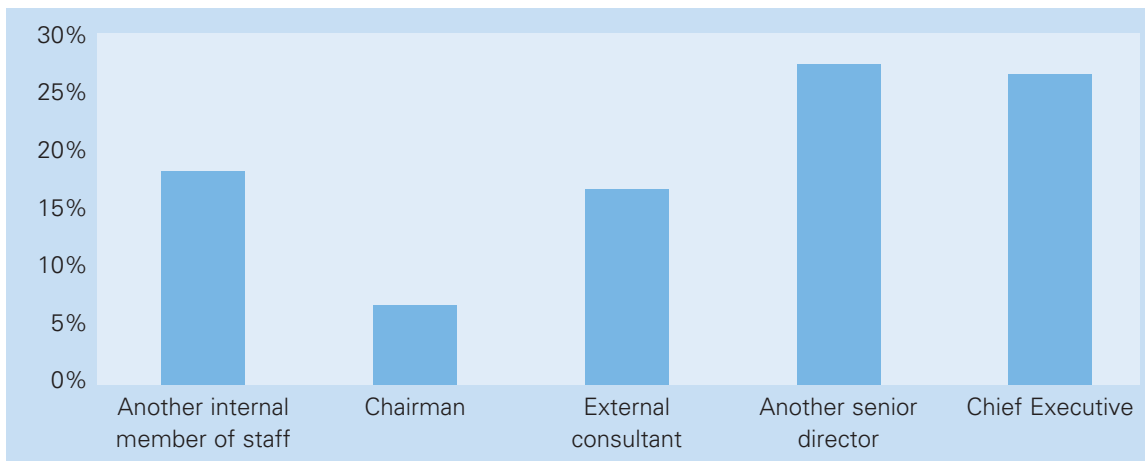


Figure 3. Distribution of responses to the question: 'Who lead the strategy workshop?'

Finally, we asked a question about the use of analytical tools during workshops. As can be seen from Table 8, the tools most typically deployed are fairly basic, SWOT being far and away the most popular (62% of cases). Of the other tools we asked about, stakeholder analysis (30%) and scenario planning (28.5%) are commonly employed, as are to a lesser degree market segmentation (22.6%) and competence analysis (21.5%).

**Table 7. Stakeholder groups involved in strategy workshops.**

	%
Senior management	76.3
Executive directors	50.8
Middle management	44.4
Line managers	33.2
Employee representatives	22.6
Consultants	18.3
Non-executive directors	15.7
Customers	5.5
Suppliers	2.4
Other	6.3

**Table 8. Analytical tools applied in strategy workshops.**

	%
SWOT	62.0
Stakeholder Analysis	30.0
Scenario Planning	28.5
Market Segmentation	22.6
Competence Analysis	21.5
PEST(EL) Analysis	17.2
Value Chain Analysis	15.1
BCG Matrix	8.6
Porter's Five Forces	8.5
Cultural Web	5.5
McKinsey's 7 S's	5.3
Other	12.5

## Workshop Outcomes

A majority of respondents agree (60.4%) or strongly agree (10.2%) that the strategy workshop they last attended achieved its objectives. However, a significant number (10% of the sample) disagree (8.5%) or strongly disagree (1.5%), the remainder (13.5%) being neutral. As with the question concerning the extent to which the workshop objectives had been clearly communicated, when the average (i.e. mean) responses were compared across the facilitator and regular participant groups there was clear evidence of a tendency for facilitators to respond on average slightly more positively (mean = 3.97; SD = 0.71) than participants (mean = 3.69; SD = 0.85).<sup>viii</sup> As might be expected there is a large and significant correlation between perceptions of clarity of workshop objectives and the extent to which those objectives are perceived to have been met.<sup>ix</sup> The overall conclusion to be drawn from this pattern of findings is that the majority of respondents (participants and facilitators alike) are satisfied that workshop objectives are both clearly communicated and largely met through workshop activities.

We also asked a series of questions concerning the extent to which and in what ways participants felt the strategy workshop had had an impact on various aspects of the organisation, such as its business processes, internal communications, people development and understanding of corporate values. It is clear from the findings presented in Table 9 that:

- The greatest impact of strategy workshops is on the content of organisational strategy;
- Over one-third of respondents also reported a wide range of other organisational benefits, in particular improved understanding of corporate values, benefits to business processes and the development and motivation of people;
- However, over one-third of respondents reported no impact other than on strategy content;
- Over 40% perceived either no impact or a negative impact of workshops on measurable outputs, including productivity and profitability, while in contrast roughly another third perceive a positive impact on these outcomes;
- Over 40% perceived either no or a negative impact on levels of innovation;
- Over 50% perceived no or a negative impact on functional aspects of the organisation such as brand management or the use of technology.

Table 10 reports the distribution of responses to a series of questions concerning the impact of workshops on the organisation's relations with a variety of stakeholder groups (both internal and external). Our findings suggest that:

- In terms of building relationships, workshops may enhance internal working relationships (perhaps because such people are involved in the workshops themselves);
- Workshops are perceived to improve relationships with customers and investors (perhaps because the focus is on strategy);
- However, there is less evidence of improving relationships with suppliers.

**Table 9. Distribution of responses (%) to the question: ‘What impact did the strategy workshop have upon the following aspects of your organisation?’**

	Very negative	Negative	No impact	Positive	Very positive
Business plan/strategy	0.2	1.3	12.3	61.7	14.3
Vision/mission statement	0.6	1.7	35.2	38.7	11.2
Understanding of corporate values	0.4	2.4	30.6	43.0	9.8
Business processes	0.2	2.5	30.1	46.4	7.1
Products and services	0.5	1.8	32.3	42.0	7.6
People development	0.8	4.6	28.0	45.2	8.5
Motivation & morale among employees	1.3	7.9	26.8	42.0	7.9
Organisational structure	0.2	3.8	43.6	32.0	5.8
Internal communications	0.5	4.4	29.5	42.6	8.5
Brand management	0.5	2.1	52.9	19.6	4.7
Innovation levels	0.7	2.8	43.2	29.4	4.7
Use of technology	0.6	1.9	49.5	26.1	4.1
Productivity	0.5	4.6	39.1	33.6	3.8
Profitability	0.1	3.4	39.7	30.5	5.2

Lastly, we asked a series of questions concerning the impact of strategy workshops on the respondent’s personal relationships with a number of stakeholder groups (Table 11) and their personal understanding of the organisation and their own motivations and career goals (Table 12). Taken as a whole, these findings indicate that:

- Strategy workshops play a positive relationship-building role amongst managerial peers and at senior levels of managers;
- But have less impact with regard to personal relationships with junior colleagues or relationships external to the organisation;
- However, they strongly contribute to participants’ understanding of organisational strategy and enhance the motivation and skill levels of participants;
- Therefore, whether by intent or not, there is a personal development benefit to be derived from these events.

**Table 10. Distribution of responses (%) to the question: ‘What impact did the strategy workshop have upon the organisation’s relationships with the following groups?’**

	Very negative	Negative	No impact	Positive	Very positive
Managers	0.8	5.9	22.1	47.5	6.0
Employees	0.9	7.0	26.9	48.5	5.1
Customers	0.2	1.5	38.3	41.0	5.2
Suppliers	0.2	1.7	60.1	18.4	1.3
Stakeholders (e.g. shareholders, investors)	0.4	1.5	37.7	37.1	5.7
Other external stakeholders	0.1	0.8	47.6	27.0	3.5

**Table 11. Distribution of responses (%) to the question: ‘What impact did the workshop have upon your relationships with the following?’**

	Very negative	Negative	No impact	Positive	Very positive	N/A
Senior managers	1.1	5.4	14.5	45.8	20.3	3.2
Colleagues	0.2	2.4	14.0	52.2	20.0	1.3
Junior managers	0.1	2.2	31.8	35.3	6.5	7.7
Customers	0.1	0.7	44.0	25.6	6.0	7.2
Suppliers	0.1	1.4	53.8	15.0	2.6	9.9
Stakeholders	0.4	1.2	38.4	25.7	7.0	7.6

**Table 12. Distribution of responses (%) to the question: ‘How far do you agree that attending the workshop improved your own understanding of the following?’**

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Organisation’s future plans	0.5	3.2	8.5	57.9	24.4
Other departments’ activities	0.7	4.4	30.9	41.9	10.4
Products/services	0.5	4.7	34.7	41.6	8.3
Competitor activity	1.7	8.9	40.1	29.6	6.0
Personal motivations	0.7	6.4	24.6	47.5	11.3
New skills/competences required	1.1	5.4	28.0	45.6	9.1
Your career development plans	2.6	7.7	38.0	31.3	8.0



## Summary and Conclusions

In recent years formalised planning systems have been augmented or in a number of cases supplanted by a range of alternative approaches to the development of organisational strategy. One approach in particular, the strategy workshop or away day, appears to have risen to the fore. However, little is known about this apparently widespread management practice. Hence, the study summarised in this report set out to investigate a number of basic questions concerning the nature and significance of strategy workshops, such as how often they occur, the reasons for their occurrence, what goes on in them and the extent to which they are perceived to contribute to organisational effectiveness and well being.

The overall costs of such workshops clearly depend on such factors as where they are held, the number and levels of managers and other stakeholders involved, the cost of external facilitation, if used, and their frequency of occurrence. Rough estimates of cost for a single two day residential event away from the office, say for a workshop involving senior executives in an international business, with external facilitation, vary from £10,000 to £50,000. Clearly they represent events of significant cost and with significant strategic expectations riding on them. So how effective are they? A number of useful conclusions regarding the nature, role and perceived effectiveness of strategy workshops can be deduced from our findings, as follows:

### **The Nature and Role of Strategy Workshops**

- Strategy workshops are now an integral part of the strategy making processes of many organisations;
- They are used primarily to question, challenge and innovate new strategies, not as a response to crises;
- They are of short duration, i.e. two days or less and usually held away from the office;
- Typically, they are led by members of the senior management team rather than external facilitators. However external facilitators are used in about 16.5% of cases;
- While in a number of cases other stakeholder groups are involved, in the majority of these events senior and middle-level managers predominate;
- In terms of preparation, participants typically spend half a day or less, implying a high dependency on managerial experience.

### **The Effectiveness of Strategy Workshops**

- About 75% of respondents reported that workshops provided an effective input into the strategic plan of the organisation;
- Other positive benefits from workshops are that they help participants improve their understanding of the organisation's goals and clarify their personal motivations. Such events, therefore, seem to play a significant organisational and personal development role, as well as addressing issues more directly concerned with the strategy of organisations;
- Less clear, however, is the extent to which and in what ways such workshops impact on objectively measurable aspects of organisational performance or objectively observable outputs (e.g. improved productivity and innovation). Our data in respect of such outcomes were limited to self-reported, subjective perceptions, but, to the extent that these perceptions are valid indicators of these outcomes, workshops appear to have only limited beneficial effects in this respect.

- Our research findings suggest insights which require further investigation in order to establish a clearer explanation of the effectiveness of such events:
  - In many cases little pre-preparation takes place in the run up to workshop but there is some evidence that relatively greater positive outcomes may occur when participants spend longer on pre-preparation than when they spend little time. However the relationship between preparation and effectiveness needs further investigation.
  - Very few of the sophisticated analytical tools and techniques which are commonplace in the standard textbooks and business school curricula on strategic management seem to be used with high frequency in these events, but to what extent and in what ways might these methods contribute to the effectiveness of workshops?
  - Numbers attending strategy workshops for the purpose of strategy development are less than those for the purposes of communicating strategy. There are also some preliminary indications that events attended by smaller rather than larger numbers of people are likely to be more effective. But the optimum composition of workshop participants in terms of the number and range of stakeholders involved given the different purposes of workshops needs to be examined further.

However, it should be remembered that this survey was based entirely on self reported perceptions of workshop events and outcomes. Arguably, a more objective consideration of the form of such events, as supported by our data, leads to a further important observation. The relatively tightly bounded participation in such events, the low levels of pre-preparation and usage of strategy tools and techniques and the relative absence of external facilitators, leads us to question the extent to which there is a systematic questioning of strategy precepts and organisational assumptions, an observation perhaps supported by the relatively low reported impact on potential 'hard' outcomes, including innovation and productivity levels.



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Advanced Institute of Management Research  
6-16 Huntsworth Mews, London, NW1 6DD  
Tel: +44 (0)870 734 3000  
Fax: +44 (0)870 734 3001  
Email: [aim@london.edu](mailto:aim@london.edu)  
Web: [www.aimresearch.org](http://www.aimresearch.org)



Chartered Management Institute  
3rd Floor, 2 Savoy Court  
Strand, London, WC2R 0EZ  
Tel: +44 (0)20 7497 0580  
Fax: +44 (0)20 7497 0463  
E-mail: [enquiries@managers.org.uk](mailto:enquiries@managers.org.uk)  
Web: [www.managers.org.uk](http://www.managers.org.uk)