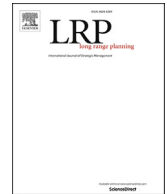




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Long Range Planning

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Organising environmental scanning: Exploring information source, mode and the impact of firm size

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ARTICLE INFO

Article history:
Available online xxx

Keywords:
Environmental scanning
Scanning mode
Exploration
Case study research

ABSTRACT

Recent research on environmental scanning has shown it to be an important part of many organisational processes related to strategy. A fundamental aspect of scanning behaviour is the mode or channel through which information is gathered. Existing research on mode selection and source use has suggested that managers prefer to use personal sources that are either internal to or external to the organisation depending on context. What is not clear, however, is why one source may be preferred to another and how different scanning modes might complement each other. We explore these issues through the collection and analysis of interview data from seven organisations of widely differing sizes. Using the organisation itself as the unit of analysis, we offer a number of theoretical contributions concerned with mode and source use in environmental scanning activity. We find that quality of information source may be less important in explaining source use than previous studies suggest. We also uncover heavy reliance on internal reporting on the environment, compiled using multiple channels, in larger companies. Furthermore, we present a variety of instances where scanning modes were used to complement one another in different ways, the patterns changing according to organisation size. Our findings, while exploratory and theoretical in nature, also have practical implications for growing organisations that wish to ensure their environment is scanned as effectively as possible.

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Introduction

Environmental scanning is the process through which an organisation gathers information about its external environment (Aguilar, 1967). Scanning is a key input into scenario planning (Sharma and Yang, 2015), an antecedent to strategic change (Ben-Menahem et al., 2013) and a driver of innovation (Berghman et al., 2013; Martini et al., 2017). In more general terms scanning has come to be viewed as part of a wider process of organisational learning (Daft and Weick, 1984; Drew, 1999; Sadler-Smith et al., 2001), and an integral component of the 'sensing' aspect of an organisation's dynamic capabilities (Danneels, 2008; Fainshmidt and Frazier, 2017; Teece, 2007; Wilden et al., 2013).

The activity of environmental scanning itself has been examined extensively in preceding literature, and appears to be driven in its focus and intensity by the level of perceived environmental uncertainty in strategically important sectors of the environment (Boyd and Fulk, 1996; Elenkov, 1997; Stewart et al., 2008). Systems for scanning the environment have been studied for their effectiveness and, while early results on their usefulness were mixed (e.g. Fahey and King, 1977; Jain, 1984), there now seems general agreement that more effective systems should be integrated into the planning and decision-making processes of the organisation (e.g. Lenz and Engledow, 1986; Mayer, 2011; Yasai-Ardekani and Nystrom, 1996).

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A key characteristic of scanning behaviour that emerges from the literature is the medium or channel through which information is gathered, often referred to as *scanning mode* (Daft et al., 1988; May et al., 2000). Research on mode has found that size of organisation is more important than industry setting in driving channel selection (Haase and Franco, 2011), and more recently that organisations use a variety of both primary and secondary sources to scan their environments even when formal systems do not exist (du Toit, 2016). Yet there is little to explain why some sources are more popular than others and research to date has struggled to address the way in which different information sources complement each other in the organisation. We seek here to explore both these issues, using detailed qualitative data from seven different organisations.

This paper is organised as follows. We first examine the current state of environmental scanning literature and provide an overview of the methods employed in our research. We then look at the relative importance of different information sources in scanning and offer some possible explanations for the choices made. Following on from this, we propose three tentative models of scanning mode use, dependent on the size of the organisation. These models together capture some of the ways in which different sources are used by organisations to develop a picture of the environment and provide further insight into the way in which different information channels might complement one another.

Theoretical background

Scanning research has examined a variety of issues and there has been a move towards studying scanning in relation to other organisational variables in recent years. These include scanning's contribution to new product development and innovation (Danneels and Sethi, 2011; So-Jin and Sawyerr, 2014), its role in the development of sustainable supply chains (Fabbe-Costes et al., 2014) and its importance in wider competence development and knowledge management (Bedford and Harrison, 2015; Taipale-Er vala et al., 2015).

A number of country-specific studies have also been conducted, demonstrating that country of origin may impact aspects of scanning behaviour (Barron et al., 2012; Stewart et al., 2008), and that deliberate scanning as an input into planning processes can affect companies' responsiveness to change (Olamade et al., 2011). At the same time, the need for proper internal information systems to support scanning has also been identified (Mayer et al., 2013).

A review of research related to scanning mode reveals a number of key themes and issues, the first of which is concerned with the term mode itself. Very early work by Keegan (1974) used interviews with senior managers to establish the information sources used to scan the environment, finding scanning to be informal and unstructured in nature. These were categorised as either internal or external sources, and as either human or documentary types of information. A similar breakdown was used by Daft et al. (1988) but new terminology was used and the expression *scanning mode* introduced. This was in contrast to research published around the same time (Ghoshal, 1988), which examined sources of information used by managers to scan the environment but used the word 'mode' to refer to intensity of scanning in four categories, viewing, monitoring, investigation and research.

The approach adopted in later research (e.g. Elenkov, 1997; Jogaratnam and Wong, 2009; May et al., 2000; Sawyerr, 1993; Stewart et al., 2008), and the approach followed in this paper, has been to treat mode and source/channel as synonymous. A breakdown of four scanning modes, *internal personal*, *internal impersonal*, *external personal* and *external impersonal*, is provided in Fig. 1, along with source examples. This figure provides a framework for reviewing prior research on scanning mode below. First we examine existing knowledge of personal versus impersonal channels and second we examine the use of internal versus external media. Table 1 provides an overview of papers that directly address scanning mode, with notes on findings about internal and external, and personal versus impersonal sources. The third column provides a summary of the paper's primary focus. These studies are reviewed next with a view to proposing research questions.

	Internal	External
Personal	Colleague or Subordinate	Contact in another company
Impersonal	Internal reports	News report Industry intelligence report

Fig. 1. Four scanning modes with source examples (based on Daft et al., 1998; Elenkov, 1997 and others).

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