

Strategy Process as Learning - Organizations at the Edge of Their Zone of Proximal Development?

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ABSTRACT

Because of the practical nature of management studies, epistemological and ontological issues are rarely profoundly considered in the studies of the discipline. However, an organization consists of people, and the world view and the conception of the human being that the management is based on has a fundamental impact on the management practices.

This paper calls into question the conception of human being of the traditional strategic management studies, and illustrates the consequences of the pragmatist-constructivist concept of human being and learning for the strategic management. The strategy process from pragmatist view on learning is considered in a case study of a Finnish municipality. In the case study, the implementation of the city strategy is studied in the Services for the elderly. We can conclude that, in our case organization, the strategies were not implemented because of the mechanistic strategic management. As a result of our study, we suggest that a successful strategy process where the strategies are implemented, calls for more leaning centered and holistic approach.

INTRODUCTION

Nowadays strategy work and strategic management are generally seen as the key tools for success in increasingly turbulent and unpredictable business environment. A strategy process is expected to set the course for an organization and provide competitive advantage in tightening business environment. Moreover strategy-work is expected to provide solution for active change management, problem solving as well as generating innovations and new knowledge. Hence the strategy process is at the core of organizational development, thus most public and private organizations in western countries have a strategy. Accordingly, the strategic management has emerged as a separate research focus as the leading school in management studies. Despite of the notable financial investment, strategy-research and work contribution on behalf of firms and employees the strategy processes the implementation of the strategies is often inadequate.

A reason for this may be that although research on strategy has remarkably advanced our understanding about the strategy process and preconditions of powerful strategic management the everyday practices of strategy work in organizations often fail to innovate and improve to reflect this progress. For example, managers are often using management tools which are based on older, mechanistic school of strategic management. We suppose that this happens simply because the modern concepts of strategy and strategy process are abstract, complex and ambiguous. Hence the older schools of strategic management are a line with “layman theories of management” and plainly more simple, concrete and easier to assimilate. This suggests not only that there is a problematic gap between sophisticated theories of strategic management and the everyday practices of strategy work but also that the researchers should pay more attention considering practical implications of sophisticated theories of strategy and thus contribute to the improvement of strategy work.

In this paper we explore the pragmatist constructivist conception of human being and it's implications for strategic management, and we consider empirically the significance given to the strategy work by employees and their sense of agency in the strategy process in a case study of a Finnish municipal organization.

STRATEGIC MANAGEMENT RESEARCH

The concept of strategy originates from the military. In Ancient Greek the word “Strategos” referred to the art of warfare (Cummings 1993). The concept of strategy was adapted to management studies in the early 60’s (Ansoff, 1984; Mintzberg 1994). In last fifty years, strategic management and strategy process have been studied from various different perspectives.

In the 1950’s the long term planning became common in organizations and it was followed by the era of strategic planning. In the early studies on strategic management, a strategy process was seen as a combination of specific decision making rules, by which the organizational behavior is managed (Ansoff 1984). The strategy was created by the top management and was rarely discussed with the operative level (Chakravarthy et al. in Chakravarthy et al 1993, 2). The strategic planning perspective considers the strategy process as an orderly, mechanistic process (de Vit et al. 2004, 120) and it can be said to be based on a mechanistic conception of human being.

However, according to many scholars including our selves, planning is oversimplifying approach when dealing with as complex phenomena as the strategy. Also the behavioral and cultural issues should have to be taken into account. Strategic incrementalism is a perspective which is criticizing the mechanistic approach of strategic planning. According to incrementalists, the strategy process involves “confronting people’s cognitive maps, questioning organizational culture, threatening individuals’ current interests and disrupting the distribution of power within the organization”. (de Vit et al. 2004, 120-122, Mintzberg et al. 1998, 179-182) Since the 1980’s strategies have been studied as cognitive processes in decision makers’ minds. There is the case of a loose collection of research which is loosely based on cognitive psychology, rather than a tight school of thought. (Mintzberg et al. 1998, 149-173) Accordingly, the modern strategy scholars (like Mason & Mitroff 1981) emphasize the complexness and continuousness of the strategy process.

Since 1960’s the strategic management has been studied from several different perspectives. However there are some general study-branches. Accordingly the strategy studies can be divided into two different subfields: strategy content research and strategy process research. The first one focuses on the strategic positions of the firm, whereas the

second one studies the administrative systems and decision processes of organization (Chakravarthy & Doz 1992). A third branch of strategic management studies can also be perceived: the research on strategy context (see e.g. de Wit et al. 2004, Mintzberg et al. 2003). The strategy context sets of the circumstances in which the strategy process and the strategy content are defined (de Wit et al. 2004). Unlike the two other branches of study, the strategy process research addresses the behavioural issues of individuals, groups and organizational units (Hirsch 1991 in Chakravarthy & Doz 1992). Even the strategy process research itself is not a cohesive discipline, but the field is fragmented into different perspectives. The classification into three subfield is either unambiguous, but the strategic management studies may as well be divided for example into ten schools (e.g. Mintzberg et al. 1998).

Despite of different approaches, the research on the behavioral aspects of the strategy process is still insufficient. The researchers are often making groundless assumptions of existing subject-object-relations in organizations. Their researches are concerned with how an individual or a group communicates its intentions to the rest of the organization. They examine a strategy process as a transparent process in which the source of input and the purpose connected to it is clear, instead of considering strategy formation as a relational, collective phenomenon. (Chakravarthy et al. 1993, 236)

Since 1990's organizational learning approach has become more and more popular field of strategy studies (Mintzberg et al. 1998, 175-231). Those studies have shed a light on, how an organization can survive in its turbulent environment by continuous learning. Organizational learning studies focuses on learning in organizational level. However, relationship between individual learning processes and a strategy process has rarely been the subject of the studies. In this paper we explore the strategy process as a holistic learning process in which individual and shared collaborative process are entwisted.

STRATEGY WORK AS LEARNING

A reason why results of the strategy work have rarely caught up the high expectations may be that strategy work is expected to provide high quality learning (e.g. Senge 1990), although preconditions for meaningful learning are not considered while conducting the

process. This article explores preconditions for successful strategy process in the terms of pragmatist view of learning.

The idea, that active learning is at the core of the strategy work both as a goal, e.g. to create competitive advantage or innovations, and as a mean to attain the goals, is of course not new. However, the process preceding this goal and its implications to strategic management are less self-evident, if we along with view stressed by pragmatists. Pragmatist view considers learning as the most important coping mechanisms available to human being, both from a biological and social point of view. From a pragmatist point of view learning not only enable us to adapt to changes, innovations and new demands, but also provide means to steer change and to take responsibility for it. (Dewey 1916, Mead 1938, Rauste-von Wright & von Wright 1997, Pyhältö 2003, Soini 1999). Although, from an evolutionary point of view we learn by nature: we learn from our actions and the resulting feedback, and the function of learning is that the learner becomes able to act more adequately in his or her life-surroundings. However, we do not automatically learn only right things e.g. only meaningful action strategies. Hence, attaining the core goal of the strategy process the high quality learning is not self-evident or easy, although strategy work can be used as a tool to promote this goal.

Research on learning has shown that acquiring and developing skills, knowledge, attitudes, and beliefs is an active process of the learner. Learners always actively select, code, interpret and test the information and the feedback gained from their actions. Even though learning is not always highly intentional or consistent process, it is still always learner's own active effort after meaning. (see, e.g. Scardamalia & Bereiter 2003, Bransford et al. 2000, De Corte 2003, Resnick 1989, Paris & Paris 2001, Sale 2001) This means that the strategy, cannot be "transmitted" successfully to employees, but they should be seen and taken as active agents and participants through the process. Accordingly, the *personnel should be seen as active subjects*, who create and implement the strategy in a continuous, dynamic and interactive process. The view differs from the traditional top-down view of strategy process which is common in Finnish municipalities.

Learning is mediated by the learner's prior knowledge, expectations, interest and values as well as by social framework. This means, that staff's prior learning experiences – for example, personal experiences with management, change, and strategy work – mediate new

learning. Accordingly, successfulness of the strategy process is strongly dependent on *significance given to the strategy work by the employees*. Spontaneous strategy-representations usually include both profitable and disadvantageous ideas, expectations and attitudes about the strategy work. Hence, it is often necessary to reconstruct and process some strategy related ideas and experiences from the CEO to a messenger boy. Therefore, as the starting point for strategy process, it is important that employees externalize their existing understanding about the basic strategy process, and receive feedback about this understanding from peers and superiors. (Compare with e.g. Pyhältö 2003) The goal for employees involved in the process is to achieve valuable information from the customer interface for the business environment analysis, and to identify problems in current practices, plans and strategies as well as personnel's professional representations, that can be formulated as questions and problems to be answered and solved in order to attain the goals. The task of a leader is to build an organization where people are continually expanding their capabilities to shape their future –that is to say, leaders are responsible for learning (Senge 1990). Thus it is essential for successful strategic management to know what employees experience as problematic, what the questions to which they seek answers for are and what their characteristic action strategies are like to be able to facilitate the strategy process that enable continuous learning.

Learning never occurs in a vacuum but always in some specific situation - in a context. The context always influences how the events are interpreted and how the knowledge is organized. The context determines what is seen as a problem and what is accepted as a solution. The most important contexts of learning are the interactions in which the learner participates actively. This means that the quality of social interaction is one of the main determinants of powerful learning environments. As a result, the quality of learning is heavily dependent on the properties of the organisation as a learning environment (e.g. Lindblom-Ylänne et al. 2002, Vermunt & Verloop 1999) Many authors suggest that an open learning environments, which embed acquisition processes in complex and authentic contexts, tend to facilitate high quality learning and thinking skills because they are meaningful for the learners and require a learner's own initiative, experimentation, planning, elaboration and self-regulation (e.g. Brown 1994, De Corte 2000, Hakkarainen et al. 2004, Sfard 2000). However, learning and strategy process as a learning process are not only cognitive activity, but they include feelings, emotions, goals, aims as well as fears are always involved. Hence in addition, effective learning environments for successful strategy

work need to be varied. At the same time, the learning environment should be emotionally safe for the experience of trust, which is a strong regulator of selective attention and readiness to try out new action strategies flexibly. Moreover, effective strategy process should integrate the acquisition of the subject-matter domains within the relevant collective meta-processes and provide room for collaboration. .

The emphasis on strategy process, in this era of innovations, should be on developing *a culture of thought*, that is, should focus on creating intellectually stimulating environments, by asking provoking questions and fostering employees' responsibility and agency over for their own learning (Costa 1992). This kind on knowledge creation involves not only individual learning but also participation in which employees intentionally promote active and shared learning. In Vygotsky's terms (1962) the successful strategy process should provide a powerful learning environment which enables the members of the organization to co-operate in the edge of their zone of proximal development, thus together solve complex problems and create innovations. And vice versa the strategic managers should adjust and aim their managerial activities to promote the personnel's learning at the edge of the zone of proximal development. Hence, it is likely that employees who consider themselves active agents of learning community are more successful in coping with change and implementing innovations in their work. Accordingly strategy work should encourage and empower employees to become collaboratively oriented, active self-regulative learners. This requires that also leaders consider themselves as "advantaged" members of learning community and master the art of active learning both as a part of their professional expertise and skill to be fostered in their staff (e.g. De Corte 2000, Soini et al 2003)

In following, above presented prerequisites of a successful strategy process, *the significance given to the strategy work by the employees and the personnel's sense of agency in the strategy process*, are empirically studied in context of a Finnish municipality. The city strategy can be compared to corporate strategy and it is supposed to be implemented in all organizational level. As a case study, we examine the implementation of the city strategy in the home care services in one Finnish municipality.

THE CONTEXT AND PARTICIPANTS OF THE STUDY

The data was collected in the Innovative Operating Models for Improving Municipal Services (KIMPPA) project of Helsinki University of Technology. The aim of this research and development project was to develop social and healthcare service networks in municipalities. The project started in the beginning of 2005 and it is financed by the Finnish Funding Agency for Technology and Innovation (TEKES) and five pilot municipalities in Finland. One of the sub research themes of the project is the strategy process. Research and development of strategy processes started with setting of objectives with the pilot municipalities, continued with visual modeling of their strategy processes, followed with interviews, climaxed with participative interventions (one for each pilot municipality), and ended with data analysis and the end report.

The project was carried out by using case-based action research approach. The data collection and analysis methods were qualitative, including semi-structured interviews, visual modeling of the strategy processes, observation of group discussions during the intervention day, and analysis of transcribed interviews and discussions. The research questions are based on a pragmatist view on learning. Firstly, we are studying the significance given to the strategy work by the employees. Secondly, we research employee's sense of agency, i.e. do they consider them selves as active subjects in a strategy process.

DATA COLLECTION AND ANALYZIS

The constructivist theories of learning and instruction emphasize the subjective construction of reality. Hence employees were considered the best informants of their thoughts about strategy and themselves as strategy workers and an un-obstructive approach was chosen. The data was collected by ten interviews and in an intervention.

The strategy process of the city strategy affect the whole municipal organization, therefore we interviewed personnel in all organizational levels from the mayor of the city to the home care worker (Figure 1). The purpose of the interviews was to perceive the process of city strategy, what the roles of different actors are and how the interviewees wish the process should be improved. All the interviews were recorded and transcribed.

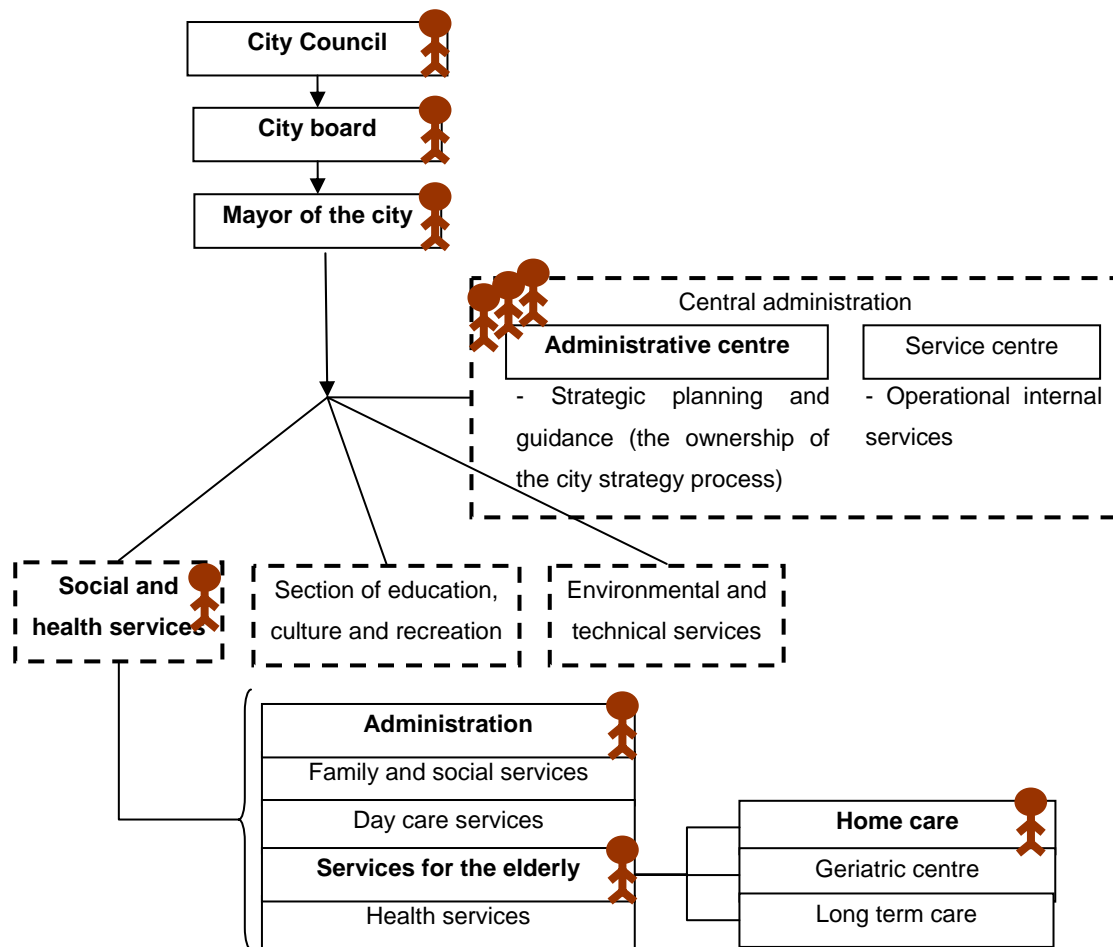


Figure 1 Organization map and the interviewees (represented by match men)

The purpose of the intervention was for the participants to achieve a holistic understanding about the current strategy process and to collect ideas about how to improve the process (to build up an ideal strategy process). There were 45 participants: 10 civil servants and 3 elected officials of the case city, 7 representatives of four other cities in Finland, 4 private service providers, 3 representatives of private organizations and 17 researchers. On the first half of the day the visual model of the strategy process was talked through (in about three hours). The researchers facilitated the discussion. In the second half, the participants were divided into groups of 4-5 people, where they developed improvement ideas for the strategy process. Every group had their own researcher as a facilitator. The intervention was video taped, audio recorded and the audio tape was transcribed.

The data analysis method used was the content analysis. All the ten transcribed interviews and the transcription of the intervention were systematically analyzed. The analysis was

based on pragmatist-constructivist conception of human being and learning. In the context of the city strategy process, we studied two types of fundamental prerequisites of learning: 1) the significance given to the strategy work, and 2) the experience of agency in the strategy process.

EMPIRICAL RESULTS

The owner of the whole city strategy process was the manager of the central administration. The central administration was coordinating the strategy process. The people of central administration participated in the weekly strategy meetings, but the staff of services for the elderly did not have any part in the strategy process. In the data we searched: 1) the significance the interviewees and the participants of the intervention gave to the strategy work, and 2) the employee's experience of agency in the city strategy process. As an overall notice we can say that the experiences were consistent inside organizational levels but they differed between. The participators of the strategy process can be divided into politicians (the members of the city council and the city board), the strategic level (the employees in the administrative centre and the mayor of the city) and the operative level (the employees in the social and health services).

The experience of agency of the employees differed between the organizational levels. The strategic level employees considered them selves as active subjects in the strategy process and talked about moving the strategies down into the operative level. They considered themselves as the strategy makers and the grass root level as strategy implementators.

- 'We've talked about how to how to move the strategy down to lower levels of the organisation.'
- 'This comes down to management of course. Every boss and their managerial skills are put into test when trying to carry out the City strategy at work places.'
- 'I don't think we have our own system for implementing the strategy, but in other fields, for example in elderly care, it is the profit centres own business to independently implement the strategy.'

However, in proportion the staff of the operative level did not see themselves as active participants in the process.

- 'Strategy, the city's strategy, comes down from the management in a way.'
- 'What they say in public is that they have decided this and that... at some point our boss talked about visions and such, stuck a poster into the wall and said:

"This in not for discussion, you have to get these things into your heads for them to come off".'

- 'The visions and the strategy of City and this huge poster... not for discussion.'

The politicians considered them self as active participants in the strategy process, but they criticized the bureaucratic municipal organization killing the motivation of their staff.

- '... you'll motivate no one, not the builder or the nurse, if you won't employ them first. And it won't be solved by this managerial attitude of "we'll include you but decide everything for you". It has to be the other way around and people, as the experts of their own field, have to be listened to seriously and respected'.
- 'They do what ever they like in municipalities. Things get decided awfully casually at the boards, even the decision about how much time a doctor can use per patient. Doctors can't decide for themselves anymore.'

Also the *significance given to the strategy process* was consistent inside but differed between the organizational levels.

The strategic level employees gave a high significance to the strategy process,

- '...this strategy covers everything in a way, because it contains different operative segments and considers separately services, industrial policy, employment, personnel, city structure and so on. It includes different functions and it is our starting point that it is the overall plan of the city. Of course it needs to be reevaluated annually because it goes to council with the budget and these two – the strategy and resources - have to be in reasonable harmony.'
- 'Every goal has criteria against which it'll be measured. We also monitor the realisation of goals three times a year and these will be evaluated by the trustees and the board.'

The people in the operative level did not consider the strategy and the strategy process significant at all.

- 'To be honest the strategic policy doesn't carry much weight and no one claims for it either.'

Politicians were critical of the whole strategy work, they did not find it significant to the operative activities.

- 'I don't think we (the municipality) should be too caught up with strategies. We should concentrate on teaching the children of Espoo, take care of the sick and maintain the city's infrastructure, because we've hired people to do these jobs and not to sit in strategy meetings, leave their phones unanswered and neglect teaching and health care.'

- ‘You don’t really need a strategy for health care or the work they do in health centres in principle. You’ve got highly educated people working in there, people with clear job descriptions, don’t’ you? You work here and take care of the people who are submitted to hospital, that should be enough and in that case you may not need a personal strategy’

The empirical results are summarized in the following table (Table 1).

Table 1 Summary of the empirical findings

	Experience of agency	Significance given to the strategy
Strategic level	Active	High
Operative level	Passive	Low
Politicians	active but critical	high in terms of politics but low in practice

CONCLUSIONS

The inspiration for this study emerged from our empirical perception, that a lot of effort was put in municipal strategy work, but the strategies were not properly implemented. We studied the strategy process of the case municipality through the central regulators of learning: the significance given to the strategy process and personnel’s experience of agency. The results showed a contradiction between the organizational levels in terms of meaning and significance given to the strategy process. The management level employees gave high significance to the strategy process, while the politicians considered strategy as a tool for policy making but did not find it operatively significant. The significance given to the strategy process by the operative level employees was low. As a result, the strategies were not implemented in everyday work in the care for the elderly. Furthermore, both the strategic and operative level employees considered the strategic level as active strategy makers and the operative level as passive receivers of the strategy. A city strategy which is made in central administration level and is supposed to be moved down into operational level is not able to create change in organization and the strategic decisions are not implemented.

Empirical results betoken, that preconditions for meaningful learning, in terms of agency and significance given to the strategy, were not met. The city strategy process was carried out in mechanistic top-down model instead of continuous and cyclic bottom up and top down process. This is a reason why strategy-work personals' commitment to the strategy was low and its implementation ineffective. Considering the grass root level employees like passive objects of the strategy is an indication of the mechanistic conception of human being. If we consider a strategy process as a learning process of the individuals in organization, the lack of seeing employees in all organizational level as learning subjects can be seen as an explanation to the unsuccessful implementation of the city strategy.

In the strategy process of our case municipality, the understanding of the strategy process seemed to be fragmented and rigid, because the spontaneous strategy representations were not problematized in the case organization. Thus, to build up meaningful understanding of the strategy process, the spontaneous strategy representations should be processed in all levels of the organization. Furthermore, to prevent the understanding from fragmentation, the strategy representations should be processed in a common process. In practice, we also find a need for the managers to carefully think over their conception of human being. According to our case study, those conceptions are not intentionally defined, but the base of strategic management is ambiguous. If supposed to be implemented, the strategy process should be seen as a continuous and comprehensive learning process.

DISCUSSION

Behavioral issues have been considered in numerous strategic management studies. However, those researches have focused on cognitive processes of the managers. There is a lack of understanding all the employees in all the organizational levels primarily as learning creatures.

In this paper we have theoretically discussed and empirically studied the strategy process from the perspective of pragmatist-constructivist view on human being and learning. Prerequisite for a successful (i.e. the strategy will be implemented) strategy process is to see personnel as active human beings who participate in the strategy formation and thereby commit to implement the strategy. Furthermore, the spontaneous strategy-representations

should be commonly processed in organizations to create meaningful understanding about the process.

If we consider learning as the central process of a human being, learning psychology should be holistically exploited in the management research. Strategic managers need management tools and we suggest that concept of “the zone of proximal development” should provide for managers a conception to outline, where the managerial activities should be adjusted. This provide that strategic management considers not only the general strategy vision but also personnel’s current ideas, problems and questions as a starting point for the strategy process. If the strategic manager ignores those opinions, the strategy process is unlikely to succeed, that is to say it will fail to generate change. To figure out the usefulness of the managerial implications of the conception of the zone of proximal development, there is a need for a further research.

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