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SITUATIONAL ANALYSIS AND ITS ROLE IN THE PROCESS OF STRATEGIC BUSINESS MANAGEMENT

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Abstract: The paper focuses on the purpose and the role of methods of situation analysis, including managerial methods used as strategic tools in the management of enterprises for the formulation and development of corporate strategies. The research started in 2016 on a test group of 456 enterprises from the Czech Republic which included all size categories. Mathematical and statistical methods were used (methods of dimension reduction and generalized linear model) to analyze and to evaluate the importance of a strategic situation analysis, including managerial methods, in the process of generation of a corporate strategy in comparison with a corporate value potential, and to identify impact on their competitiveness and sustainability in the current market environment. The decisive activities for manufacturing and industrial enterprises include scientific and technical development and input logistics; in the services sector, the decisive activities are marketing, management of material and after-sale servicing. Profitability and competitiveness in the primary sector are most significantly influenced by output logistics and services. The value chain has been proved to strongly influence economic results and profitability but a generally presented opinion has not been confirmed about the importance, necessity and universal character of internal and external strategic analyses for formulation and development of a corporate strategy.

Key words: situational analysis, value potential, methods of management

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Introduction

Euroregions With the existing business sphere in the national as well as the international context, it is increasingly possible to observe and indicate ground-breaking, often discontinuous changes in the business environment. The changes taking place in the external business environment have not induced or have had an adequate response in the internal business environment. This real-existing state by a renowned scientific community declared as a management paradigm is reflected in a number of contemporary economic and management theories, including strategic planning cycle methods, the basic scientific approach of which is strategic situational analysis. It is important to note that in recent years this trend has been accelerating and deepening, and in this reality, one of the reasons for the growing

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interest of the professional and lay public in the impact of the business environment on the profitability, development and competitiveness of enterprises can be seen.

Literature Review

The current business environment is very changeable, discontinuous and turbulent, even chaotic (Drucker, 1994; Minzberg, 2007; Kotler and Caslione, 2009; Pachura 2015; Grabara et al., 2016; Demir et al., 2017; Dagnino et al., 2017; Schendel, 1991). However, not all the changes can be considered disruptive, i.e. not all the changes are revolutionary and do not require a strategic response. It is important to assess if these changes distort the existing competitive advantage of businesses operating in a particular sector (Magretta, 2012; Mintzberg, 2007; Koscielniak et al., 2017; Ulewicz, 2018).

Strategic management in the Czech market environment is still considered to be a new area. Despite general knowledge of its definition, only the most common methods and general description are used. Special methods, approaches, research, and solutions used in the various competitive strategic management areas as applied in developed countries are still poorly known and limited in availability (Mallya, 2007; Mueller et al., 2007; Edwards, 2018). Managerial decision making is very difficult at present, managers are deciding in a highly vague environment; many of them fail to predict what will happen in half a year, a year or a much longer period of time such as in three to five years (Sliwka, 2011; Suikki, 2007; Borison and Hamm, 2010). In this sense, it is beneficial to take into account the possible occurrence of cognitive distortions (Frankovský et al., 2016).

By Keřkovský and Vykypěl (2006), the strategic situational analysis is a prerequisite for successful decision-making of managers, the assessment of the factors surrounding the business environment, requirements and changes in the behaviour of customers, competitors, suppliers, but also, the development of macroeconomic factors including the characteristics of internal company resources. Social intelligence of a manager plays an important role in this context (Frankovský et al., 2015). Similar opinion on defining situational analysis with tiny differences in the description and the context of micro-environment is shared by a number of authors, such as, Frynas and Mellahi (2011), Kislingerová and Nový (2005), Gomes, (2011), Nigel and Campbell (2002), Ginter et al. (2013), Weng (2013), Anttila and Jussila (20180. As reported by Jakubíková (2008), the Strategic Situational Analysis is a comprehensive approach to capturing significant factors influencing the company's business in a context that results in the creation of designs and possible strategies to the extent that the environment is stable or dynamic, simple or complex future behaviour of the company and is a prerequisite for the quality of the entire strategic process. Porter´s works (2012, 2015) are an important milestone in dealing with the situational analysis. In these works, it is reported, that business strategy is not dependent on the ability to anticipate change; the broad picture of what groups of customers and what needs would be strong in

the next three to five years are important. However, Porter admits that good analysis is crucial, but it is not, in his opinion, reasonable to create a business strategy in advance, as the company's path to finding a really good strategy can take several years (Magretta, 2012). The differences between the analytic approach and strategy design are also discussed by Abraham (2012) and Duggan (2007). In spite of these views, a strategic situation analysis is given a relatively strong meaning in a number of professional publications and is an integral part of the strategic planning cycle as one of the steps preceding the formulation of the corporate strategy (Gunn and Williams, 2007; Gaidelys and Dailydka, 2014; Abdulhussien and Hamza, 2012; Williams and Naumann, 2011).

After studying available references, it is possible to assume that it is useful to use certain analyses of situational analysis, in particular the Porter model of five forces (Zeng et al., 2001), the value chain (Fearne et al., 2012) or the strategic map of the sector (Ganushchak-Yefimenko, 2010), in the framework of strategic business management, but other analyses must serve as a supportive tool for creating a corporate strategy (Afonina, 2015). This assumption is based on the fact that it is necessary to take into account their structure and contents in the selection of suitable analyses, as some of them are not universal in character and cannot be used in a uniform unified manner. On a vastly extensive test file, these issues have been analysed and the outputs are a contribution to the ever-increasing professional discussion in the field of strategic management theory in today's market economy conditions.

Material and Methods

The research dealing with topics of strategic management and decision-making of Czech business entities started in 2016, it has been still underway and it is being extended and made more accurate. The research used an extensive questionnaire survey complemented with structured interviews with leading top managers of selected business entities. Before the beginning of field research, the questionnaire was consulted with representatives of the business sphere, as well as with representatives of the scientific community specialized in the respective area. In order to ensure a quality of the survey a team or inquirers was set up and trained and the research was conducted through personal contacts, as well as through electronic inquiries.

Testing used the method dimensional reduction (DR) and the Generalized Linear Model (GLM). Dimensional reduction is a method that estimates the dimension and central subspace of the general linear model. This means that we want to find p x d dimensional matrix B of the minimum rank d such that $F(y|x)=F(y|B'x)$, (Cook, 1998; Cook and Lee, 1999; Chiaromonte et al., 2002). The dimensional reduction calculation is based on the inverse distribution $F(x|y)$. In the analysis, the calculation methods of dimensional reduction referred to as incisive inverse regression (SIR), is used. The statistical software "R" is used for the calculation. GLM allows expressing the relation between the explained variable and the set

of explanatory variables (regressors) by a regression function that is a linear function of unknown estimated parameters (McClullagh and Nelder, 1989). The dimensional reduction reduces the dimension of the variables with respect to the explained variable, which in this case represented the profit/loss of enterprises (PL). Due to the assumed different function of the value potential of enterprises in various sectors of the national economy, the dimensional reduction was performed for each sector separately. The model is determined by the following formula:

$$\begin{aligned} \mathrm{dr}(\mathrm{formula} &= \mathrm{PL} \sim \mathrm{IPUTLOG} + \mathrm{OUTPUTLOG} + \mathrm{MAS} + \mathrm{SAOSS} + \mathrm{PUR} \\ &+ \mathrm{STD} + \mathrm{HRM} + \mathrm{CI}, \mathrm{data} = \mathrm{M} = \text{"sir"}) \end{aligned} \quad (1)$$

Variables of the value potential of an enterprise:

INPUTLOG – Input Logistics
OUTPUTLOG – Output Logistics
PUR – Purchase
MAS – Marketing and Sales
HRM – Human Resource Management
CI – Corporate Infrastructure
STD – Scientific and Technological Development
SAOSS – Service and other supporting services

Such a variable was used as an explanatory variable together with other factors (Internal Strategic Analysis, External Strategic Analysis, Management Methods and Value potential of an enterprise) in a generalized linear model to explain the profitability of companies. Due to the fact that the profitability was monitored only as a categorical variable, the multinomial distribution was used in the generalized model as the distribution of the explained variable together with a logit link function. The statistical software "Statistics" is used for the calculation. The model is determined by the following formula:

$$\begin{aligned} \mathrm{Ln}\left(\frac{\mathrm{mu}}{1-\mathrm{mu}}\right) &\sim \text{Internal Strategic Analysis} \\ &+ \text{External Strategic Analysis} + \text{Management Methods} \\ &+ \text{Value potential of an enterprise} \\ &+ \text{dummy variables of DIR} \end{aligned} \quad (2)$$

Results and Discussion

Results Using a Dimensional Reduction

The dimensional reduction of the entire sample of enterprises can be assumed to affect the success rate, respectively the competitiveness of enterprises (without their sectoral differentiation and size categorization), scientific and technological development, marketing activities and repair or other after-sales services (Table 1). Results of dimensional reduction within the sector differentiation have reported that the success of manufacturing and industrial enterprises depends, in particular,

on activities such as scientific and technological development and input logistics, and the importance of which enterprises attribute these activities.

Table 1. Dimensional reduction of the entire test file

Variable	Dir1
Input logistics	-0.09083
Production	0.09937
Output logistics	0.14260
Marketing and sales	0.57969
Repair and other additional services	0.43672
Purchase	0.09655
Scientific development	0.64961
Human resources	-0.04287
Enterprise Infrastructure	-0.04040

Dir 1 is the first cut to which data is distributed by the dimensional reduction method

In the case of service-oriented businesses, however, marketing activities material management and after-sales service are significant.

Table 2. Dimensional reduction in sectors of the sample

Variable	Dir1	Dir1
	Production and industry	Services
Input logistics	0.452607	-0.25018
Production	0.137702	0.28829
Output logistics	-0.183631	0.21485
Marketing and sales	0.006144	0.51556
Repair and other additions service	-0.073812	0.41392
Purchase	-0.393406	0.49602
Scientific development	0.642368	0.31494
Human resources	0.386175	-0.06629
Enterprise Infrastructure	0.142976	-0.14621

The above-mentioned results are possible to be discussed in terms of the content and structural differentiation of the tested sectors, and the significant differences between production and technological processes with a different level of human labour factor as a source of added value. At the practical level in manufacturing and industrial enterprises, scientific and technological development and input logistics are the basis for innovation potential, respectively for innovative changes that make it possible to obtain a competitive advantage, without the full implementation of human resources being fully implemented, and therefore the value of the "human resource management" variable is increased. Unlike the manufacturing sector, the decisive factors are those that depend mainly on direct contact between the service provider and the end customer. This is a fundamental difference from the manufacturing sector, where the performance and quality of the product are a measure of success in the production process and only subsequently

applied to the sale of marketing and other services. A dimensional reduction was also performed with regard to the size of the sample enterprises, for large enterprises with an assumption of differentiated results from small and middle-sized enterprises (Table 3).

Table 3. Dimensional reduction with specification for large enterprises

Variable	Dir1	Dir1
	Production and industry / large businesses	Services/ large businesses
Input logistics	0.15178	0.1017203
Production	-0.02926	0.6140118
Output logistics	0.02427	0.0003731
Marketing and sales	0.16944	0.3995610
Repair and other additions service	0.44038	0.1636882
Purchase	-0.55784	0.2210807
Scientific development	0.49925	-0.3185270
Human resources	0.33398	-0.5154513
Enterprise Infrastructure	-0.28441	0.1008628

Some specifics were revealed while comparing large enterprises to the total sample. Repairs and after-sales services, together with scientific and technological development, are particularly important for large manufacturing and industrial enterprises. This can be justified by the increasing weight of service and security services, respectively. A change in the nature of the work itself, which is increasingly replaced by modern technologies, is characterized by high demands on preparatory, service and security work. These jobs are gradually being held by middle management, unlike the past, when these jobs are performed by workers' professions. For the service sector, we can see a diametric increase in the value of our own service delivery process, which, in the case of large service enterprises, is the value base of this sector, which plays a significant role in creating added value.
Also, the importance of factors such as human resource management and scientific development is decreased in large enterprises. This seeming contradiction, when these factors, especially human resources, bring added value and uniqueness; for large companies, these parameters are on an approximately comparable basis; they are not perceived as a competitive opportunity and strength, their importance is growing in lower size categories and special services.The results prove that size is, not the decisive limit in creating the value potential of enterprises as it is in sector classification. The answer can be found in the general business theory of management and in the content and structure of managerial functions that vary in intensity, but in the general definition, they take place in all size categories. Business practice, however, points to the crucial influence of individual sectors, in manufacturing plants and on the other hand, these disparities are significant and, to a large extent, crucial and specific for services.

Results Using a Generalized Linear Model

Table 4 reveals the weights of different variables creating a new, reduced explanatory variable. These results can be regarded as crucial and important for further research activities.

Table 4. Results using a generalized linear model

Effect	PL - Credibility Test type 3 (Table1.sta) Distribution: MULTINOMIAL Link function: LOGIT			
	Degrees of freedom	Ln-credibility	Chí-sq.	p
Internal Strategic Analysis	2	-292,744	3,32434	0,189727
External Strategic Analysis	2	-291,358	0,55245	0,758643
Management Methods	2	-291,306	0,44906	0,798891
Dimensional reduction of the enterprises's value potential	**2**	**-305,539**	**28,91379**	**0,000001**
Sectoral Differentiation	2	-293,543	4,92168	0,085363
Size Classification	6	-293,068	3,97269	0,680372

The results in Table 4 unambiguously indicate the high significance of the value potential of all enterprises positively affecting their profit, regardless of their size categorization and sectoral differentiation. The use of internal and external strategic analyses, including managerial methods, is insignificant, but what is decisive is the individual activities that create the specific value potential of enterprises, on the basis of which companies gain a competitive advantage in a hard-to-compete market environment. These conclusions are listed:

- The importance of the value chain for profitability, profitability and economic sustainability has been demonstrated, regardless of the size categorization, but with respect to sectoral differentiation of enterprises.
- The study does not prove the common view of the importance, necessity and versatility of internal and external strategic analyses for the creation and formulation of a corporate strategy, the integral part of which is the definition of the value orientation of the respective enterprise. As the results of the survey in the corporate sector suggest, the knowledge and application of these methods are gradually losing the importance that has been attributed to them.
- A similar trend for internal and external analyses is noticed for management methods and tools such as Balanced Scorecard, Management by objectives, Total Quality Management, Kaizen etc. Their importance gradually decreases over the initial strong expansion, with some enterprises being negligible and insignificant already, especially in the case of fully automated and programmed production plants and services; on the other hand, for mass band production, they are still widespread.

– The decisive factors currently involved in the development of the corporate sphere are those that create the specific value potential of the enterprises, create their current uniqueness, on the basis of which companies gain a competitive advantage in a hard-to-compete market environment.

Before the beginning of the study, the authors conducted a detailed literary search of foreign sources in particular, which covered 100 leading scientific works. The search has proved that no similar survey has been ever performed in the Czech Republic. An analysis of foreign sources has shown that the scientific community is divided into two groups. The first group of authors, so far dominating, sees the situation analysis or its methods as the critical tool for evaluation of internal and external corporate environment for generation of a corporate strategy. The second group, smaller but ever more recognized in corporate practice, sees the situation analysis only as an auxiliary tool and it prefers the value chain as an appropriate analytical tool, which ensures uniqueness, originality and high level of competitiveness. The authors of this paper belong to the second group as the results they have obtained by now correspond to outputs of scientific works performed by the leading representative of the group (M. Porter). It must be observed that no similar studies have been yet published. For partial scientific outputs, we have found general conformity with results obtained by the authors of this paper.

Conclusion

The paper discussed an important part of the current paradigm of strategic management based on the role of situational analysis including management tools in the process of designing a corporate strategy. The results reveal the following conclusions.

The use of dimensional reduction and a generalized linear model is proved to be a well-chosen method for analytical work in situational analysis. The results of the above-mentioned mathematical and statistical methods confirm their ability to communicate and prove their ability to test the factors of the internal environment of enterprises in terms of their function in creating the value potential of enterprises, their prosperity and sustainability. Specially designed artificial variable allowed testing factors that are undoubtedly influencing the value potential of businesses and their profitability, internal strategic analysis, external strategic analysis, management methods, and partial factors in the value chain. There is a very controversial situation in the enterprise sphere related to the use of situational analysis and management tools, differentiated by both enterprise size categories and their sector differentiation. Knowledge (theoretical) of the methods of situational analysis increases with the growing size of enterprises, with an increased emphasis on the manufacturing sector. Small and medium-sized enterprises hardly ever report the practical implementation of situational analysis methods; for large enterprises and international corporations, the methods of situational analysis are used more often, with the use of full range of methods not occurring and the most frequent occurrence is indicated in SWOT analysis,

competitor analysis, portfolio analysis and Porter's five-strength model. It applies to medium-sized enterprises, but especially to large enterprises. Gradually, the importance of analysing value potential is increasing. Its uniqueness and originality of competitive advantage are usually highlighted by TOP managers. Methods of situational analysis including management methods in their totality are increasingly perceived by the management as auxiliary, complementary methods for elaborating detailed analysis of the value chain and determining the value potential of the company. The assumption that the methods used for situational analysis cannot be approached as unified has been proved, the methods have different structure, content and sectoral differentiation and from this point of view, it is necessary to approach their implementation in a practical business world with a market economy. The results suggest that in applying the common framework of the value chain, its structure, content and function is related to specific activities on which the chain is built and implemented, both in production and services. Manufacturing and industrial enterprises attach great importance to their competitiveness, in particular through research and development activities, input logistics and human resource management, these activities have a positive impact on their economic performance, far less importance is attached to production activities, corporate infrastructure and marketing activities.The primary sector creates its value potential through output logistics along with repair services, corresponding to its nature and structure. The service sector shows different values from previous sectors (production and primary), with the greatest impact on business competitiveness, marketing, material economy and service, less is devoted to science and technology development, service delivery and logistics output. This can be considered a real expression of the nature of the service. Size categorization of enterprises has been proved to be less significant than their sectoral differentiation. The analysis of all enterprises, irrespective of the size categorization and the sectoral differentiation from the viewpoint of the tightness of the dependence of the value potential of the enterprises on the economic result, research activities are the most inspiring. It is clear from the results of GLM that companies do not recognize the importance of using internal and external strategic analyses, including managerial methods, but especially they assess their value potential, as it significantly contributes to their competitive advantage in today's highly competitive environment.Taking into account the current state of knowledge and reflecting on the intense changes in the corporate environment, one can expect a growing importance of the corporate value chain in the generation of a corporate strategy, improvement of profitability and competitiveness. Structured interviews with leading managers have supported this conclusion and practices used by the most prestigious Czech enterprises indicate that in the future the value chain will play a dominant role in the development of competitiveness, profitability and sustainability of businesses.

Is this the crossroads of strategic management? Is using situational analysis, analysing the external and internal environment, and other management tools, such as Balanced Scorecard, Management by objectives, Total Quality Management,

Kaizen and others, not efficient as reported by some studies abroad? By the authors of the paper, such a conclusion would be premature and inaccurate. However, it is increasingly necessary to perform further research of the field including the classification of changes in the internal environment of enterprises. Only this way, theoretical bases of strategic management and practical methods and tools will be in line with changes in the production and non-production spheres both in the Czech Republic and abroad.

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ANALIZA SYTUACYJNA I JEJ ROLA W PROCESIE ZARZĄDZANIA STRATEGICZNYMI BIZNESAMI

Streszczenie: Artykuł koncentruje się na celu i roli metod analizy sytuacji, w tym na metodach zarządzania wykorzystywanych jako narzędzia strategiczne w zarządzaniu przedsiębiorstwami w zakresie formułowania i opracowywania strategii korporacyjnych. Badanie rozpoczęto w 2016 r. od grupy testowej 456 przedsiębiorstw z Republiki Czeskiej, które obejmowały wszystkie kategorie wielkości. Do analizy i oceny znaczenia analizy sytuacji strategicznej, w tym metod menedżerskich, w procesie generowania strategii korporacyjnej w stosunku do potencjału wartości korporacyjnej, oraz określenia wpływu na ich konkurencyjność i trwałość w obecnym otoczeniu rynkowym, zastosowano metody matematyczne i statystyczne (metody redukcji wymiarów i uogólniony model liniowy). Decydujące działania dla przedsiębiorstw produkcyjnych i przemysłowych obejmują rozwój naukowy i techniczny oraz logistykę nakładów; w sektorze usług decydującą działalnością jest marketing, zarządzanie obsługą materiałową i posprzedażną. Na rentowność i konkurencyjność w sektorze pierwotnym największy wpływ ma logistyka produkcji i obsługa. Wykazano, że łańcuch wartości silnie wpływa na wyniki ekonomiczne i rentowność, ale ogólnie przedstawiona opinia nie została potwierdzona w kwestii znaczenia, konieczności i uniwersalności wewnętrznych i zewnętrznych analiz strategicznych dla sformułowania i opracowania strategii korporacyjnej.
Słowa kluczowe: analiza sytuacyjna, potencjał wartości, metody zarządzania

战略分析及其在战略业务管理过程中的作用

摘要:本文着重分析管理与发展。该研究于2016年开始，对来自捷克共和国的456家企业进行了集体测试，其中包括所有规模类别。分析了数学和结构方法，包括公司和区域方法;并确定对市场的影响。工业和投入工程的决定性活动;在服务部门，决定性的活动是营销，材料管理和售后服务。物流和服务的盈利能力和竞争力。为证明社会和经济问题的发展，证明了这一链条的价值。
关键词:情境分析，价值潜力，管理方法