Strategy meetings and workshops

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Key topics

1. A practice perspective on meetings
2. Different meeting practices and their effects on strategy
3. Linking meetings over time
4. Relation between meeting and wider organization
5. Strategy workshops
6. Inter-organizational workshops
General views on the relevance of meetings

First view: Meetings as irrelevant and useless

Second view: Meetings as a place where the important things are going on

Third view: Meetings as shaping what is going on within them (practice perspective)
Some statistics

- Managers spend between 60-70% of their time in meetings.
- More than 11 million meetings take place in the USA each day.
- Organizations like 3M spend 7-15% of their personnel budget on meetings.

Definition of meetings

A planned and episodic communicative event that involves several participants co-located in the same (physical or virtual) space and whose purpose is ostensibly related to the functioning of the organization or group. (Seidl & Guérard 2015)

Central characteristics
• planned
• episodic
• focused on talk
• a gathering
• co-location in space
• official purpose

Examples
• On-site/off-site meetings
• Open/closed meetings
• Regular/irregular meetings
• Strategic/administrative meetings
• Organizational/inter-organizational meetings
• …
Meetings from a practice perspective

• Meetings are practices (i.e. routinized types of behaviour)

• Meetings can be part of other practices (such as strategic planning, budgeting)

• Meetings contain several practices that are specific to meetings (such as the use of a meeting agenda or the chairing of a meeting)

• Meetings contain practices that can also be found elsewhere (such as voting or the use of PowerPoint)
Different functions of meetings described in the literature

- **Coordination Function**
  - Synchronization
  - Pooling and distribution of information
  - Distribution and monitoring of tasks

- **Cognitive Function**
  - Sense-making
  - Critical reflection
  - Generation and development of new ideas

- **Symbolic Function**
  - Legitimation/validation of established order
  - Ritual
  - Status and status change

- **Political Function**
  - Setting and advancing an agenda
  - Bargaining
  - Formation of alliances & building support

- **Social Function**
  - Establishing relationships & networks
  - Team building
  - Development of org. identity

(Dittrich et al. 2011)
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What makes a meeting “strategic”

• Meetings that are explicitly labelled “strategic”
• Meetings that serve as sites of strategy work
• Meetings that are consequential
A framework for studying meeting practices

• **Initiation practices**: setting the conditions for the meeting and the relation to the organizational context

• **Conduct practices**: practices of communication

• **Termination practices**: linking the meeting back to the organizational context

(Hendry & Seidl 2003)
Initiation practices

Practices of setting up a meeting (Jarzabkowski & Seidl 2008)

- Setting the agenda
- Selecting chair
- Setting location
- ...

Shaping power dynamics in meeting discussions
Conduct practices I – some findings

Discursive practices of chairpersons (Wodak et al. 2011)
- Bonding
- Encouraging
- Directing
- re/committing
- Modulating

Discursive practices for developing collective view of strategy (Kwon et al. 2014)
- Re/defining
- Simplifying
- Equalizing
- Legitimating
- Reconciling

Different combinations used in shaping strategy

Practices employed in developing collective view of strategic issues
Conduct practices II – some findings

Turn-taking practices (Jarzabkowski & Seidl 2008)
- Free discussion
- Restricted discussion
- Restricted free discussion
- ...

Different effects on stability and change of strategic orientations

Practices of emotional displays (Liu & Maitlis 2014)
- “Energetic exchange”
- “Amused encounter”
- Discord interaction
- Recurrent confrontation
- Depleting barrage
- ...

positive emotion display: generative strategizing
negative emotion display: truncated strategizing
Termination practices

Linking to other meetings (Jarzabkowski & Seidl 2008)

- Rescheduling
- Setting up working group
- Voting
- Stage managing re-coupling

Shaping likelihood for uptake of new strategic ideas
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Study on how strategic issues travel across meetings (Jarzabkowski & Seidl 2008)

15 new strategic ideas in university context

The new ideas went through three different paths

Path 1: leading to positive selection (11 new ideas)
Path 2: leading to de-selection (2 new ideas)
Path 3: leading to de-selection (2 new ideas)
Influence of meeting practices on take-up of new strategic ideas

Paths of ideas for strategic change

Emergence of new ideas
- free discussion
- „restricted-free“ discussion

Development of ideas
- re-scheduling
- free discussion
- working groups

Selection of ideas
- „stage managing“

Change

Confirmation of Status Quo

Restriction on development of new ideas
- restricted discussion
- „restricted-free“ discussion

De-selection of new ideas
- voting

Status Quo

Status Quo
Key insights of the study

→ Different combinations of meeting practices across different meetings required for the development of new strategic ideas.

→ Combination of practices determines whether new ideas are developed to the stage of challenging existing strategic orientations or whether status quo is preserved.
The role of text in linking meetings: the development of a strategic plan across meetings (Spee & Jarzabkowski 2011)

Translation of meeting talk into text (strategic plan) “fixes” ephemeral meeting talk (de-contextualization)

Interpretation and re-contextualization of text in context of next meeting
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Impact of wider context on the meeting (Clarke et al. 2012)

• Inter-discursive relationships (e.g. previous talks)
• Extra-linguistic social and institutional context of the meeting (e.g. hierarchical position of the participants)
• Broader socio-political and historical context
Relation to pre-meeting talk

**Hoon (2007): committee meetings**
Informal conversions outside formal meeting creating alignment around strategic issues and providing opportunities for making pre-arrangements for the formal meeting

**McNulty and Pettigrew (1999): Board meetings**
Pre-meeting talk enables board members to increase chance of acceptance of their proposals
Hierarchical position shapes possibilities of contributing to developing a strategic plan

• People in superior positions: new proposals and right to make proposals tends to be accepted

• People in subordinate positions: need to negotiate right to make proposals
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Strategy workshops as particular types of meetings

Definition:
“the practice of taking time out from day-to-day routines to deliberate on the longer-term direction of the organization” (Hodgkinson et al. 2010)

Different purposes of strategy workshops
• Initiation of strategic change
• Communication of strategy
• Strategy implementation
• …

Hodgkinson et al. 2006; Aaken et al. 2013
Some statistics on strategy workshops

- Strategy workshops found in more than 70% of companies
- Lasting between half-a-day and several days
- More than 70% take place away from the organization’s premises

Hodgkinson et al. 2006; Aaken et al. 2013
Strategy workshops and the suspension of structures

Strategy workshops as “strategic episodes”

“The basic function of the episode is simply to make it possible to suspend and replace structure for a certain time period.” (Hendry/Seidl 2003)
Emergence of new ideas in workshops

“[Strategic change] usually requires **stepping out** of the existing management process – since these processes are set to sustain the ‘old’ cognitive perspective” (Doz/Prahalad 1987)

→ Strategy workshops allow for critical reflection and for the emergence of new ideas.
Strategy workshops and the liminal experience (Johnson et al. 2010)

Extent of liminal experience depends on

(1) level of ritualization of the workshop
   - Removal (e.g. geographic distance, activity differentiation etc.)
   - Liturgy (i.e. prescribed forms of interaction, e.g. use of tools)
   - Use of specialists (e.g. workshop facilitators)

(2) Legitimacy of liturgy and specialists

(3) Signaling suspension of structural roles by people in authority (e.g. CEO)
Effects of liminal experience in strategy workshops (Johnson et al. 2010)

- **Anti-structure**: temporary suspension of participant’s normal social status
- **Communitas**: communal commitment to the purpose of the workshop (“emotional energy”)

Allows for conflict of opinions without affective conflict

Fruitful context for the emergence of challenging new ideas
Problem: limitations to the transferability of new ideas to the organization at large

“Effectivity paradox” of workshops

“the very separation and anti-structure that [strategy workshops] foster may hinder the transfer of ideas and plans back to the everyday work situation”

(Johnson et al. 2006)

→ But how do some strategy workshops get around this problem
## Countering the effectivity paradox (MacIntosh et al. 2010)

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<th>Frequency</th>
<th>Seniority</th>
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Results of the study regarding effectivity paradox

• Single workshops unlikely to produce strategic change
• Effectiveness dependent on duration, frequency and seniority of participants

Explanation

• Resolution of “effectivity paradox” through a series of workshops – gradual interweaving of workshops and ongoing organizational processes
• Development of new ideas requiring time for experimentation, iteration, learning
• Frequency/rhythm providing momentum and sustainability
• Seniority of participants necessary for legitimizing new ideas to the organization at large.
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Increasing cases of inter-organizational strategizing workshops (Seidl & Werle 2018)

• Observation: Increasing cases of inter-organizational strategizing workshops

• Particularly when confronted with intractable “meta-problems” (Hardy et al. 2006) – characterized by uncertainty, complexity and unclear boundaries

• Purpose of inter-organizational workshops: development of joint strategy or to support strategizing of individual organizations

What is going on there? How can we explain that?
Inter-organizational workshops as means to extend ‘sensemaking capacities’

• Metaprocesses outstretch the “sensemaking capacities” (Weick 2006) of individual organizations

• “When a capacity to make sense is challenged by unexpected cues that cannot be located within existing mental models, rejection of these can mean that important opportunities or potential threats are missed […] resulting in […] ineffective decision-making.” (Wright 2006)

→ Inter-organizational workshops allow companies to “pool different perspectives” (Hardy et al. 2006) and to “search for solutions that go beyond their own limited vision of what is possible” (Gray 1989).
Different patterns of extending sensemaking capacities through inter-organizational workshops

- 'Triggering sensemaking' – Sequential sensemaking
- 'Complementary sensemaking' – Parallel sensemaking
- 'Selective Extension of sensemaking' – Selective transfer

→ In contrast to internal workshops, inter-organizational workshops not about suspending structure but to make use of sensemaking capacities of other organizations.
Conclusion
Key learnings about meetings/workshop

• Identification of different meeting practices and functions
• Confirmation of the impact of meetings on strategy
• Impact depending on combination of meeting practices
• Suspension of organizational structures through workshops
• Identification of the “effectivity paradox” of strategy workshops
• Series of workshops as means of dissolving the paradox
• Inter-organizational workshops as extension of sensemaking capacities
• ...
Some promising areas for further exploration

• Links between activities inside and outside meetings
• Relation between different meetings
• Relation of different meeting functions to each other
• Mechanisms of suspension in workshops
• Particularities of inter-organizational workshops
• Etc.
Questions
Hardy et al. 2006
References cont.


