



# 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
- ...



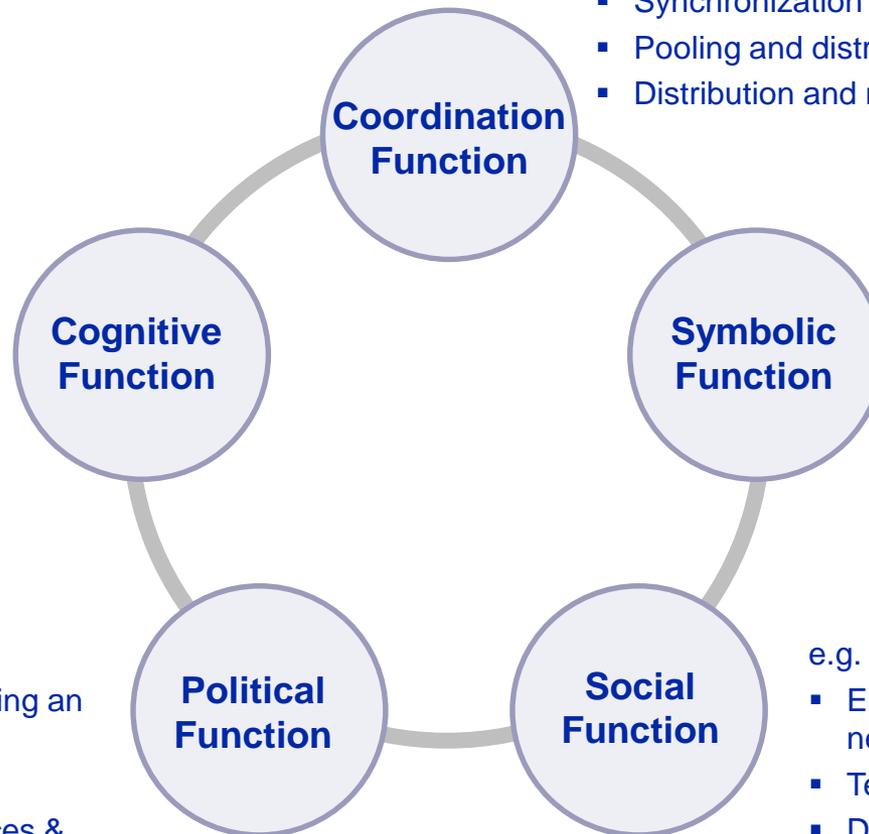
## Meetings from a practice perspective

- 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

e.g.

- Sense-making
- Critical reflection
- Generation and development of new ideas



e.g.

- Synchronization
- Pooling and distribution of information
- Distribution and monitoring of tasks

e.g.

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

e.g.

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

e.g.

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



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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



# 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

**Different combinations  
used in shaping strategy**

### Discursive practices for developing collective view of strategy (Kwon et al. 2014)

- Re/defining
- Simplifying
- Equalizing
- Legitimizing
- Reconciling

**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

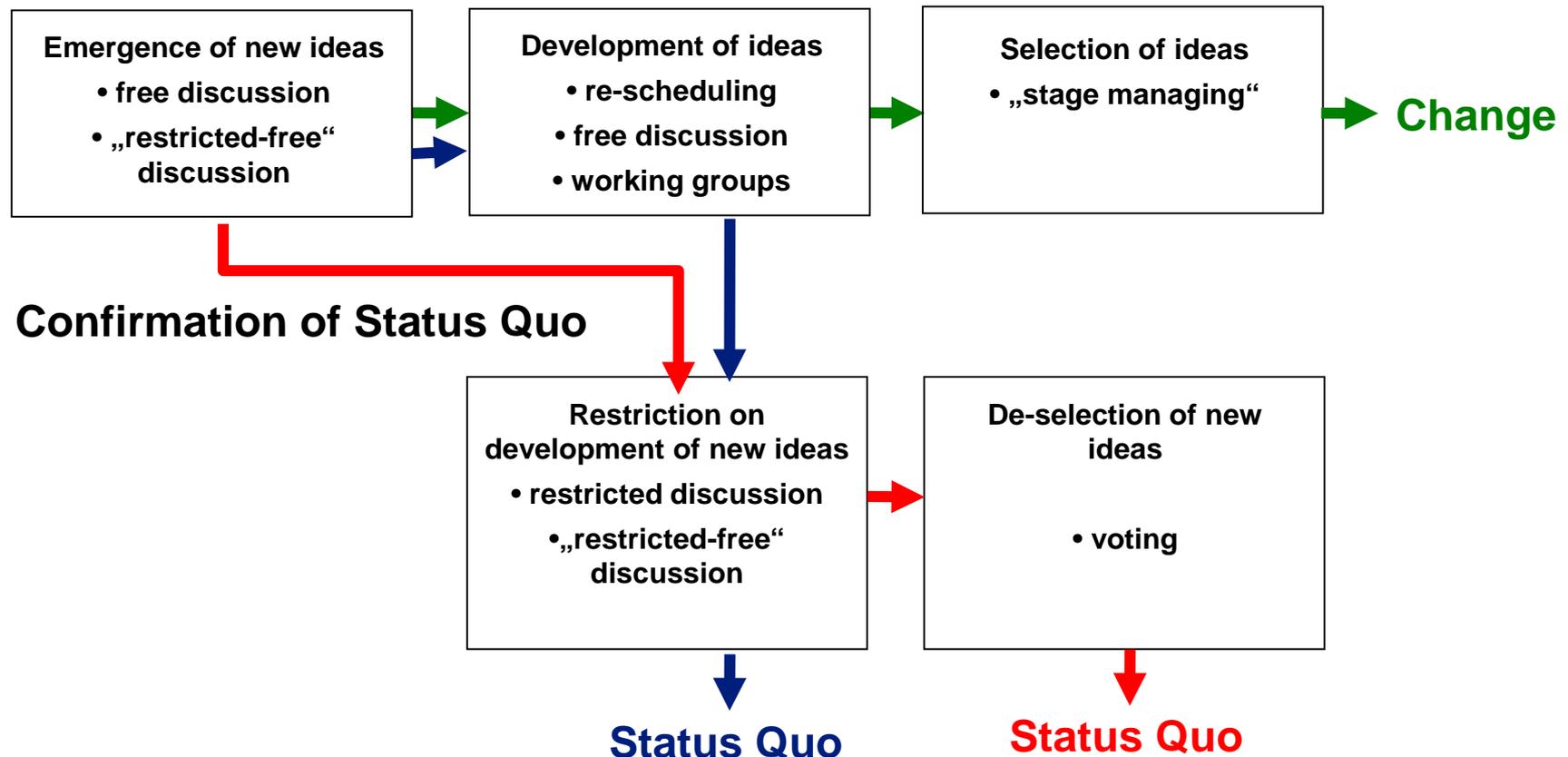
Path 1: leading to positive selection (11 new ideas)

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



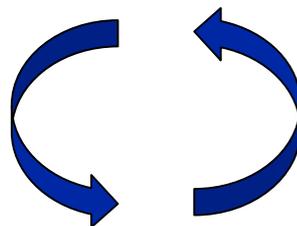


## Key insights of the study

- 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 conversations 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



## Organizational hierarchy (Asmuss and Oshima 2012)

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:

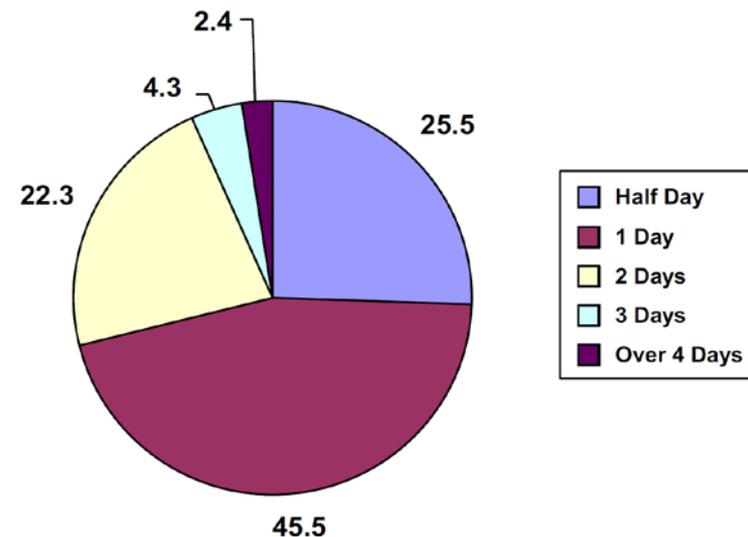
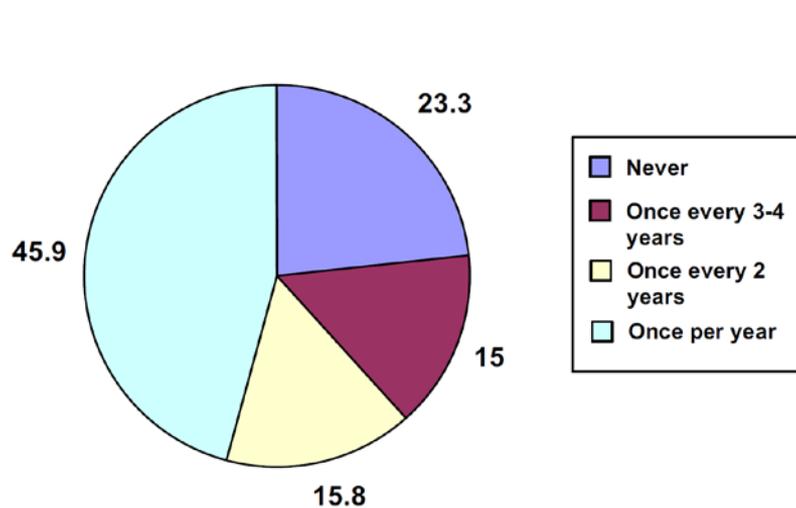
“the practice of taking time out from day-to-day routines to deliberate on the longer-term direction of the organization” (Hodgkinson et al. 2010)

### Different purposes of strategy workshops

- Initiation of strategic change
- Communication of strategy
- Strategy implementation
- ...

## Some statistics on strategy workshops

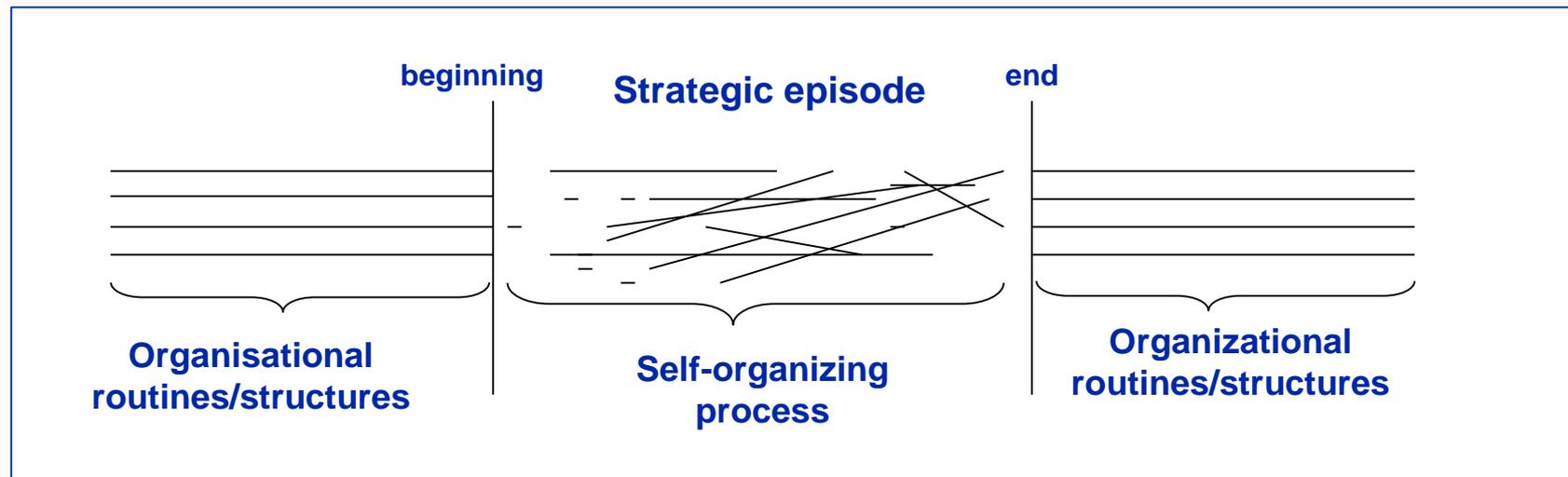
- Strategy workshops found in more than 70% of companies
- Lasting between half-a-day and several days
- More than 70% take place away from the organization's premises



# 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)

Organization	Number	Duration	Frequency	Seniority	Effect
<b>A</b>	34	18 months	High	High	<i>Change</i>
<b>B</b>	32	30 months	High	High	<i>Change</i>
<b>C</b>	9	12 months	Medium	High	<i>Change</i>
<b>D</b>	7	3 months	High	High	<i>Only init. change</i>
<b>E</b>	4	24 months	Low	Init. high	<i>Only init. change</i>
<b>F</b>	3	14 months	Low	High	<i>Only init. change</i>
<b>G</b>	2	3 months	Medium	High	<i>Only init. change</i>
<b>H</b>	6	3 months	High	Low	<i>No impact</i>
<b>I</b>	1	1.5 days	--	High	<i>No impact</i>
<b>J</b>	1	2 days	--	High	<i>No impact</i>

## 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 on-going 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’

- Metaproblems 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.

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# 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

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