Meetings as Strategizing Episodes in the Social Practice of Strategy

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ABSTRACT

Despite their pervasiveness and significance in everyday organisational life, meetings have received comparatively little serious academic attention as organisational phenomena. This paper argues that studying meetings as strategizing episodes can add to our understanding of the social dynamics of shaping strategy. Drawing on Hendry and Seidl's (2003) theoretical framework of strategizing episodes as micro-evolutionary mechanisms in the strategy process and based on empirical data of 51 strategic-level meeting observations, the paper elucidates the episodic nature of strategic meetings in shaping organizational strategy. In line with perspectives on strategy as a social practice, our study examines meetings as they occur within and contribute to the social dynamics of shaping an organization’s strategic orientations. The findings make three main contributions. First, they contribute to the strategy-as-practice research agenda by explaining how the conduct of meetings is related to consequential strategic outcomes, such as stabilization or change within an organization’s strategy. Second, they generate an empirically-informed taxonomy that shows how serial meetings link to each other, how topics are connected between these meetings, and how meetings have an impact upon wider organizational activities. Third, this taxonomy conceptually extends Hendry and Seidl’s (2003) framework by explaining the way different types of meetings shape the micro-evolutionary path that
variations take from proposal, through development to selection or un-selection in the wider organization.

**INTRODUCTION**

Despite their pervasiveness in organisational life meetings have received comparatively little serious academic attention as organisational phenomena. This is surprising in the field of strategy, since meetings are conspicuous events in the strategy process. They are scheduled routinely; for example in the annual strategic planning cycle. However, they are also turned to during critical strategic incidents; for example, calling a meeting whenever an important strategic issue arises. Meetings can thus be understood as focal points for the strategic activities of organisational members, inherently associated with the stabilizing of strategy into recurrent patterns but also its evolution during times of crisis or change. In this paper we maintain that a study of meetings as strategizing episodes can add to our understanding of the social dynamics of shaping strategic activity.

Drawing on a conceptual framework of meetings as episodes in the flow of organisational activity (Hendry and Seidl, 2003) and based on empirical data of 51 strategic-level meeting observations, this paper elucidates the episodic nature of strategic meetings in shaping organizational strategy. In line with perspectives on strategy as a social practice (Jarzabkowski, 2004; 2005; Jarzabkowski et al, 2006; Johnson et al, 2003; Whittington, 2003; 2006), our study examines meetings as they occur within and contribute to the social dynamics of shaping an organization’s strategy over time. In particular, we are concerned with how meetings are involved in either stabilizing and reconfirming existing strategy orientations or proposing
variations that cumulatively generate changes in strategic orientations over time (Chia, 1999; Tsoukas and Chia, 2002; Wilson and Jarzabkowski, 2004).

The paper is in four sections. First, we present the literature on meetings and link this to Hendry and Seidl’s (2003) systems-theoretical framework as a means of empirically addressing some of the gaps noted in existing studies of meetings. Second, the empirical research design and analytic process is explained. Third, the paper presents a first-order empirical analysis of the specific structure and conduct of meetings, followed by a second-order analysis of how different types of structure and conduct shape the evolution of variations to existing strategy. This second-order analysis is used to develop an empirically-informed taxonomy of the relationships between meetings. Finally, the paper discusses the results and contributions of this study.

Three main contributions are made. First, we contribute to the strategy as practice research agenda by explaining how the conduct of meetings is related to consequential strategic outcomes, such as stabilization or change within an organization’s strategy. Second, the second-order taxonomy extends existing meeting research by showing how serial meetings link to each other, how topics are connected between these meetings, and how meetings have an impact upon wider organizational activity. Third, this taxonomy conceptually extends Hendry and Seidl’s (2003) framework by explaining the way different types of meetings shape the micro-evolutionary path that variations take from proposal, through development to selection or un-selection in the wider organization.
THEORETICAL BACKGROUND

Meetings as organizational phenomena

Meetings as a topic of research have received surprisingly little serious attention in the literature, being considered “a neglected social form of organizational studies” (Schwartzman 1986; see also Schwartzman 1994). Due to their taken-for-grantedness in modern life, the significance of meetings has been overlooked by researchers (Schwartzman 1986; Boden 1994). In the classical organization studies literature the meeting is typically perceived instrumentally as a tool for accomplishing specific tasks, particularly for making decisions (e.g. Simon 1997); albeit not a very effective tool. It is only more recently that social scientists have started systematically to study meetings as a specific social form. In contrast to the instrumental view these studies also draw attention to the role of meetings as routinized social practices, which serve to stabilize the greater social system of which they are part (Peck et al 2004). Much of this research comes from political studies, analysing the role of meetings in the public policy-making process. Meetings are seen as important for setting agendas (Adams 2004; Trepper 2004), building commitment (Terry 2001) and providing information to policy makers (Adams 2001) rather than for generating policy decisions as such. Other meetings research comes from anthropology and sociology. For example, one stream of research focuses on the forms and functions of meetings in different types of societies (e.g. Bailey 1965; Howe 1986; Myers 1986). Another stream of research is framed in the ethnomethodological tradition, treating meetings as discursive constructs; “meeting as talk” (Boden 1994: 85). These authors study the micro-techniques that participants use in order to bring forth a meeting as a specific social
setting (Atkinson et al., 1978; Boden 1994; 1995; Schwartzman 1989), such as turn-taking in speaking, reference to an agenda, and markings of beginning and ending. Thus, rather than treating meetings as a given structure, they are viewed as the participants’ accomplishment. Building on these studies, a nascent systems-theoretical literature on meetings analyses the specific mechanisms through which meetings reproduce themselves as self-referential, autopoietic systems (Kieserling 1999; Luhmann 1995; Seidl 2005a; 2005b). Meetings are thus conceptualized as important but under-researched phenomena that contribute to the everyday activities through which organizations are constituted.

These various strands of literature provide some useful schemas which can be used to define meetings. A meeting is defined as a planned gathering of three or more people who assemble for a purpose that is ostensibly related to some aspect of organizational or group function (Boden, 1994; 1987; Schwartzman, 1989). Meetings are distinct from casual encounters; they have an organizational purpose, involve multi-party talk and are considered episodic because they bracket in some actors and issues during a particular space and time, whilst bracketing out others (Boden, 1994; Schwartzman, 1989). Within these common characteristics, meetings may have varying classifications. For example, a common distinction arises between formal and informal meetings (e.g. Boden 1994; Kieserling 1999; Seidl 2005a). Schwartzman (1989) distinguishes slightly differently between scheduled and unscheduled meetings. Unscheduled meetings typically do not occur at specific times, their degree of formality is low and the meeting is not formally responsible to any other group. Scheduled meetings, in contrast, typically take place at set times, are comparatively formal and are either formally responsible
to another group or a sovereign. Distinctions may also be made between decision-
or task-oriented meetings and information-oriented meetings (Boden, 1994; Kieserling 1999; Seidl 2005a).

Extant research suggests that we study specific aspects of the structure and conduct of meetings in order to understand them as social accomplishments Schwartzman (1989). Thus, some researchers have begun to analyze particular aspects of planning and managing meetings, such as the role of agendas and chairing (Bostrom, 1989; Kieffer, 1988; Monge et al. 1989; Volema and Niederman 1996). By contrast, Boden (1994) proposes that meetings should be studied as a whole phenomenon that brackets actors and issues within a particular time and space. She distinguishes between three basic components of the meeting as a whole: (1) the opening of the meeting, which might be more or less explicitly marked; (2) the particular turn-taking mode, which ranges from unrestricted turns to a completely pre-allocated order of turns that may or may not be moderated by a chairperson; (3) the closing of the meeting, which might be accomplished more or less formally.

The literature also indicates that meetings serve a role within wider organizational activities. For example, meetings have variously been noted to provide a forum for assembling and coordinating different organisational perspectives and agendas (Boden 1995), or for merging the formal and informal organization (Dalton 1959). These authors propose that meetings sustain the unity of the organization. More generally many researchers speak of the meeting as ‘sensemaker’ (e.g. Schwartzman 1989; Weick 1995) because they provide an opportunity for members to attribute meanings from the wider organization to their own sayings and doings.
Meetings can also “socially validate” the organization and its goals “because acceptance of the [meeting] form requires, at least in part, acceptance of the current social and cultural order” (Schwartzman, 1989: 41). Seidl (2005a) discusses potential organizational effects of meetings such as reducing complexity, concealing the basis of decisions (see also Huisman 2001), and accessing and serving as a repository for organizational memory. Furthermore, meetings may enable particular topics to be kept alive within the organization until a window of opportunity for deciding on those topics opens (Trepper, 2004). It is suggested that the particular organizational function that a meeting serves varies with its specific form (Schwartzman 1989; Boden 1994, Peck et al. 2004).

There is, however, little systematic research into how meetings keep topics alive, how the form and functions of different meetings vary and what the implications of these variations are. For example, while Schwartzman (1989) explicitly noted the importance of studying the relationship of meetings to each other, her own research simply points out that meeting tend to give rise to subsequent meetings. Boden (1995) proposes that “across numerous meetings which themselves form sequential structures of interaction, organizational goals and agendas are surfaced, submerged and, occasionally, agreed and advanced.” (p. 90) but does not trace the sequential relationships that enable these important functions to occur. Similarly, Peck et al. (2004) noted that sometimes particular suggestions get withdrawn at meetings, only to resurface at later meetings. However, none of these studies has actually analysed the relationship between meetings in detail, tracking how issues pass through a series of successive meetings, how the characteristics of meetings enable issues to be raised, maintained or resurfaced, and what implications this has
for maintaining or changing the organizational structures and goals. Our paper addresses this gap, by examining the specific characteristics of strategy meetings, the various forms they take, their sequential relationships and what implications these characteristics, forms and sequences have in shaping organizational strategy.

Meetings as strategizing episodes

We propose that, as central organizational phenomena, meetings are likely to play a key role in shaping strategy and that this has been largely ignored in strategy research. Our argument is based on Hendry and Seidl's (2003) theoretical framework of strategizing episodes, which is derived from social systems theory (Luhmann, 1990; 1995). An episode is a sequence of events marked by a beginning and an ending. While any activity has a beginning and an ending, the essential point about the episode is that beginning and ending also serve as an orientation to the activities taking place in-between. Luhmann discusses issues such as time-limitation and goal-orientation, which socially structure the communication within episodes. For example, the need to reach a recommendation may structure communication within a meeting and guide it towards an ending. Episodes, by nature of their beginning and ending, are thus related to but also stand apart from the wider flow of organizational activity.

Hendry and Seidl link this concept of episode directly to the concept of strategic stability and change. They argue that episodes, by nature of being apart from ongoing organizational activity, allow organisational members to step out of the established social and communicative structures of their daily work and to reflect on them. Such 'stepping out of the ongoing management process' (Doz and Prahalad
or 'switching of contexts' (Roos and von Krogh 1996) is a necessary precondition for the initiation of strategic change. As the daily flow of organisational life involves largely stabilized patterns of activity, the strategic episode makes it possible for actors to distance themselves from and reflect on these stabilisations and, on the basis of these reflections, to either reinforce or to change them. As Hendry and Seidl (2003:188) point out, not only the change of strategy but also its stabilization is actively created within such episodes (see also Wilson and Jarzabkowski, 2004).

"Strategic episodes are the mechanism by which [the incremental changes in the organisation's structure resulting from random perturbations] are reflexively monitored, not just to identify situations where the existing strategy may no longer be appropriate … but also to realign the organization, where appropriate, with the existing strategy. A strategic episode that results in a positive confirmation is just as important for the organizational well-being as one that results in change."

A meeting is an episode because it has a clearly defined beginning and ending which guide the communications taking place within (Hendry and Seidl 2003; Seidl, 2005a). For example, the participants within the meeting are aware of its temporal restrictions and therefore communicate differently than if the meeting were to continue indeterminately. Meetings as episodes thus serve as a temporary suspension of (some of) the existing organizational orientations that stabilize strategy. At the beginning of the episode some of the orientations are suspended which are then reinstated at the end of the episode; "The basic function of episodes is simply to make it possible to suspend and replace structures for a certain time period" (Hendry and Seidl, 2003: 183). However, even where the strategic
orientations are either confirmed or changed within the episode, this also needs to be fed into the wider organisation. The effect of a meeting therefore depends on the receptiveness that its outcomes meet within the wider organization. Hendry and Seidl conceptualise this relationship between episode and organization as a micro-evolutionary variation and selection process: the episode provides the organisation with 'proposals' for strategic change (variation) which might be selected, depending on the receptivity of the organisation and the way that the variation is introduced into its existing strategic orientations. They develop a conceptual framework for the systematic analysis of strategic episodes, which focuses attention on three critical aspects of an episode: its initiation, its termination and its conduct. This framework, which provides a theoretical basis for Boden's (1994) proposal to analyze meetings as a whole phenomenon, is used to guide the analysis of strategic level meetings in this paper.

The *initiation* is the point at which the strategic episode gets 'de-coupled' from the ongoing organizational processes. In addition to the suspension of established structures the initiation is also the point at which new structures for the activities within the episode are established. This is comparable to Boden's (1994) opening point, at which the meeting brackets in some actors and issues and brackets out others. *Conduct*, deals with the activities within the episode. The conduct of the episode is crucially important for the results that can be achieved. A reflective stance towards the established strategic orientations can only be reached if the conduct of the episode enables a critical distance from the wider organization and its orientations. In many cases, however, the conduct of an episode may lead to the confirmation of existing orientations, which is also important because it stabilizes
strategy by reinforcing the status quo. Analyzing meeting conduct will thus involve examining particular procedures, such as turn-taking (Boden, 1994; Schwartzman, 1989) and the way that these procedures either reconfirm existing strategy or propose variations that destabilize strategy. The termination of the meeting is the point at which the earlier structures are reinstated and it is also the point at which the episode is ‘re-coupled’ to the outside processes. At the closure of the meeting, Boden notes that the bracketing process is completed and members disperse back to their daily organizational activities. If the meeting is to have any effect on the wider organization, at this stage any proposed variations to existing strategy, however micro, must be incorporated into the organization (Hendry and Seidl, 2003). The ending, however, also protects the organization from potentially disruptive effects occurring within the episode by filtering what is admitted out of the meeting into the wider organisational processes.

Research questions

This paper draws upon Hendry and Seidl’s framework to conceptualize meetings as strategizing episodes, which are consequential in shaping strategy as a socially accomplished activity (see also Jarzabkowski et al, 2006; Johnson et al, 2003). We are specifically interested in formal strategy meetings, as these are a neglected social phenomenon, often relegated to ‘rubber-stamping’ exercises (Schwartzman, 1986). In doing so, we do not assume that formal meetings are more or less important than other informal processes. Rather, we suggest that the formal meeting as a recurrent social practice in organizations merits scrutiny as a social accomplishment in itself. As formal meetings and their role in shaping
organizational strategy is under-researched, we develop two exploratory research questions that guide our investigation (Eisenhardt, 1989; Langley, 1999).

How do the characteristics of formal meetings as strategizing episodes enable the suspension of everyday social structures of organization?

What are the implications of these characteristics for stabilizing or destabilizing the organization’s existing strategic orientations?

**RESEARCH CONTEXT AND DESIGN**

This paper is based on a study of 51 strategy meetings within three universities. Universities are insightful contexts for studying strategizing episodes because they adopt ostensibly democratic forms of governance, in which organizational members expect to at least be consulted on strategic issues that will affect the organization as a whole (Hardy, 1991; Jarzabkowski, 2005). As a result, universities typically have many meetings that include members of the academic community in order to ensure that the strategy-making process is conducted in view of others (Cohen and March, 1986). We term these ‘open’ meetings because they are not restricted to the top management team, but have representatives from the academic community, such as professors, departmental or faculty heads, and, potentially, more junior members of staff. The open nature of such meetings serves collegial expectations about democratic governance (Simon, 1997). While open meetings are a symbol of democratic participation in governance (Adams, 1986; Weick, 1995), they also provide a vehicle for top managers to shape strategy within the political constraints and professional norms of such contexts (Cohen and March, 1986; Peck et al,
Universities share many characteristics with other public and professional organizations such as hospitals, cultural organizations and policy-making bodies. For example, they typically have diffuse power relationships, an autonomous professional workforce and deal in knowledge-based goods and services (Cohen and March, 1986; Denis et al, 2001; Lowendahl and Revang, 1998). The findings from this study might therefore be expected to have wider relevance in other public- and third-sector organizations.

A longitudinal study of three UK universities was conducted over a seven-year period, of which six years were retrospective, while the final year, pertaining to this study of formal meetings, was real-time. Drawing upon existing typologies (O'Leary, 1997), cases were selected from three types in order to reflect the parameters of the UK university sector outside the ancient universities, which were excluded because of their atypical governance structures. Three cases that were within a realistic travel distance for rich qualitative data collection were selected on the basis that they met the typology criteria, offered equally high quality access to rich data, and were well ranked examples of their type, heightening process comparability (Pettigrew and Whipp, 1991). Specific details of the three cases are disguised to preserve anonymity, being labelled Entrepreneurial University, Modern University and Collegiate University.

The unit of analysis in this paper is formal strategy meetings. The paper thus focuses upon the data set of 51 strategic level meetings that were observed over a one year period. Meetings were identified as strategic through interviews with top
managers and this identification was confirmed by examining the content of such meetings, both in real-time and retrospectively through their various minute books. These meetings were strategic because they dealt with issues that were consequential for the organization as a whole, particularly in terms of their reputation and prestige, their growth, and their financial viability and survival, which are all important sources of competition in the university sector (Brewer et al, 2002; Gioia and Thomas, 1996; Slaughter and Leslie, 1999). An additional indicator of strategic importance is that each meeting was chaired by a top team member, usually the Vice-Chancellor (VC), except for those meetings of the Boards of Governors, which were chaired by the Chairman of the board.

Table 1 summarizes the meetings that were observed, highlighting whether they were open, meaning a wider membership than the top management team, or closed, meaning attended only by the top management team. All meetings were observed by the first author as a non-participant observer. She had full access to all meeting agendum and minutes and was treated as a participant for the purposes of receiving all meeting documentation in advance of meetings. Meetings were not tape-recorded because of the confidential nature of strategy topics (Laurilla, 1997; Pettigrew, 1992) and participants’ perceptions that recording would be more ‘visible’ than note-taking and therefore constrain their interactions, which would have been counter to our data collection purposes (Maitlis, 2005). Therefore, during the meetings, extensive notes were taken on every item discussed, including as many verbatim quotes as possible and also some notes on gestures, expressions and other body language that accompanied the meeting process. Additionally, the first author always arrived early for meetings and lingered afterwards, so that she could
observe any pre- and post-meeting discussion and interactions that might pertain to the meetings. All field notes were written up within 24 hours, as recommended with observational data (Yin, 1994). Including field notes, agendum and supporting documents, our meeting data was in excess of 1,000 typed A4 pages.

<table>
<thead>
<tr>
<th>Entrepreneurial</th>
<th>Collegiate</th>
<th>Modern</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 7 x Main strategy committee (Open)</td>
<td>• 7 x Main academic resource committee (Open)</td>
<td>• 3 x Main top managers meeting forum (Closed)</td>
</tr>
<tr>
<td>• 6 x Main commercial income group (Open)</td>
<td>• 2 x Governing committee (Open)</td>
<td>• 2 x Governing (Open)</td>
</tr>
<tr>
<td>• 5 x Main academic resource committee (Open)</td>
<td>• 1 x Academic governance committee (Open)</td>
<td>• 2 x Strategy meetings with department heads (Open)</td>
</tr>
<tr>
<td>• 1 x Other strategic working party (Open)</td>
<td>• 1 x Strategic meetings with department heads (Open)</td>
<td>• 1 x Academic governance committee (Open)</td>
</tr>
<tr>
<td>• Total = 19</td>
<td>• 6 x Other administrative committees (5 Closed, 1 Open)</td>
<td>• 6 x Other consultative TMT meetings (Open)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 1 x Strategy day between TMT and Board (Closed)</td>
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<td></td>
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<td>• Total = 15</td>
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Table 1: Summary of meeting data set
While the unit of analysis is formal strategy meetings, this study aims to explain how such meetings contribute to the stabilization or destabilization of existing strategy. Therefore, a richly triangulated body of data is drawn upon to furnish information on strategy (Jick, 1979). For example, six years of retrospective data were derived from extensive documentary sources, such as meeting minutes, strategic plans, memoranda and university calendars, complemented by 49 interviews with senior managers, comprising both retrospective questions about strategy as well as probing current issues. These data were used to develop rich chronological narratives of the strategies in which each university was engaged.
(Langley, 1999; Pentland, 1999). This enabled us to contextualize the role and impact of meetings within the strategy-making process. In particular, we could identify which issues in meetings constituted stabilization of existing strategy and which might be considered as propositions of variation because we had a chronicle of the strategies being pursued in each university over time (see Author, 2003; 2005). Stabilisation refers to any issues that are used to confirm the existing strategic orientations of the university, while destabilisation refers to any variation proposed within a meeting that might, if adopted, constitute a modification to or evolution of existing strategic orientations.

**Analytic method**
We took the two research questions as our starting point for interrogating the data, extrapolating the key characteristics of strategy meetings, how they suspended organizational structures and analyzing how these characteristics contributed to the stabilization or destabilization of existing strategy. The meeting data were coded in Nud*ist, with key themes then clustered and reduced over four successive phases (Strauss and Corbin, 1998).

First, using Hendry and Seidl’s framework, we separated the characteristics of initiation, conduct and termination within meetings, fleshing out their broad categories by drawing upon themes from the meeting literature where possible, such as turn-taking, the role of agendas and moderation through a chairperson (e.g. Boden, 1994; Kieffer, 1988; Monge et al, 1989; Schwartzman, 1989). In *initiation*, we looked at how the meeting constituted a bracketing of issues and actors. In *conduct* we studied how meeting talk developed around particular issues. In *termination* we examined how issues within the meeting were either resolved for
reintroduction to the organization or how they were referred to a future meeting. These three characteristics of meetings are presented in the results.

Second we analyzed the degree to which the type of meeting *suspended organizational structures*, enabling participants to step apart from and reflect upon existing strategic activities. Suspension of structures refers to suspension of social structures, such as authority relationships, hierarchies and typical workplace activities and jurisdictions. From this we derived three broad categories of meetings: those that mainly suspended organizational structures, those that iterated between suspension of organizational structures and maintenance of them, and those that largely maintained organizational structures.

Third, we studied the implications of these meeting characteristics and types for stabilizing or destabilizing existing organizational orientations towards strategic activities. We examined specific incidents that took place in each meeting, analyzing these incidents in relation to our chronological narratives of each university's strategic activities. This analysis enabled us to identify *proposed variations* to the existing strategic orientations of a university within any given meeting. Some of these incidents are used as representative examples in the first order analysis to illustrate how meeting characteristics are associated with proposed variations to existing strategy.

Finally, we analyzed the chronological order of meetings and traced the flow of proposed variations through this chronology. Drawing upon the first order analysis of the characteristics of particular strategy episodes, we examined the linkages between episodes and the way that a proposed variation, in iterating through these episodes, evolved towards an outcome of stabilization or destabilization of
organizational strategy. This analysis enabled us to explain how particular episodes were associated with the emergence of proposals of variation, the capacity for these proposals to be sustained and developed, and the implications when they were eventually re-coupled to the organization. This culminated in a taxonomic classification of episodes according to the extent to which they suspend organizational structures and what role this suspension plays in enabling some proposed variations to evolve to the point of destabilizing existing strategic orientations. This taxonomy forms the basis of the second order analysis (Van Maanen, 1979).

**FIRST ORDER ANALYSIS: CHARACTERISTICS OF STRATEGY MEETINGS**

In this section, the typical characteristics of meeting initiation, conduct and termination are described and explained according to the extent to which they enable suspension of organizational structures.

*Initiation*

*Removal from usual work environment*

The initiation of a meeting always involves some decoupling from the flow of everyday activity, establishing a space and time in which some organizational structures may be temporarily suspended. This is because a meeting disrupts participants from day-to-day engagement in their typical departmental roles, providing them with a reason to gather from their disparate places within the organization (see also, Schwartzman, 1989). Strategy meetings are typically conducted in a central physical location within the university, which furthers their
decoupling from everyday activity as most participants become physically remote from their departments. The establishment of the meeting thus enables suspension of organizational structures and orients members towards the activities of the episode, rather than the ongoing enactment of their own daily routines and practices of organization. However, at the same time it reinforces some existing organizational structures because the central location privileges the work of top managers, as it is usually part of their routine physical domain, such as a boardroom which they use frequently.

*Interacting with unfamiliar others*

Meeting initiation brackets some actors together and excludes others. Meeting participants are brought into interaction with others outside their typical workplace for the purpose of focusing upon the particular topics of the meeting. For example, the departmental head must leave departmental issues and focus upon the broader strategic issues of the meeting, in interaction with colleagues who may not hold similar departmental views. Any ‘partisan’ enactment of the organizational role was formally controlled, with members of a particular department expected to either leave the meeting or abstain from discussion during consideration of issues to do with that department. It was also socially controlled:

“Those individuals who are peddling their own barrow from the point of view of self interest get very quickly sidelined and lose any influence they have in that particular debate or even generally. And that's noted by everybody. In other words they've just taken themselves out of the scene; they are doing the exact reverse of what they had hoped to be doing” (Former DVC, Entrepreneurial).
While it suspends structure for most participants, interacting with unfamiliar others also privileges top managers because there are usually at least three members of the top management team on a meeting, who are familiar in interacting with each other.

*Setting and chairing the agenda – open meetings*

Initiation establishes the new structures that will govern the episode. The formal agenda demarcates the beginning of the episode and structures its conduct (see also Kieffer, 1988; Monge et al, 1989). While an agenda establishes the focus of the meeting, its purpose differs according to open and closed meetings and so, may indicate more or less suspension of organizational structure. In the open meetings, agendas were formally prepared in consultation with a top team member and sent out some two weeks in advance. Despite the democratic participation in open meetings, the agenda places considerable control over the structure and content of the episode in the hands of the Chair. The Chair typically opens meetings with an oral report that sets the scene and opens the first item on the agenda. For example, in opening a meeting on the resource allocation process, the VC at Collegiate University sets out his main concern for the meeting, which is to make a decision on agendum 3, an issue of postgraduate student fee levels that will influence the direction of the university’s growth, before launching into an oral report on agendum 1, an issue that needs no decision. Typically items that required decision or where high discussion was expected did not appear as the first or second agendum, being delayed until the episode was fully under way, which enabled the Chair to establish authority over the meeting structure and conduct prior to the introduction of
potentially destabilizing issues. Thus, the agenda in open meetings only partially suspends organizational structures; participants are suspended from their daily organizational activities but their role in the organizational hierarchy is not suspended. The authority accorded to the Chair by the establishment and use of the agenda, privileges the Chair in shaping how that meeting may attempt to stabilize or destabilize strategy.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Effect on suspending everyday organizational structures</th>
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| Taking people out of their usual work environment | • Signals decoupling from everyday departmental activity  
• New physical and social context is established  
• Privileges top managers |
| Interacting with unfamiliar others | • Brackets some actors together, who do not habitually interact, while excluding others  
• ‘Partisan’ departmental issues must be left behind  
• Privileges top managers |
| Setting and chairing the agenda | • Signals decoupling from everyday issues and focuses on organization-wide (strategic) issues  
• Brackets some issues for consideration and excludes others  
• Privileges top managers both in setting and chairing the agenda |
| Establishing ‘closed’ or ‘open’ meeting | • Due to ‘public’ display open meetings tend to reinforce existing authority structures  
• Closed meetings are attended by top managers and have the potential for greater suspension of the established structures  
• Closed meetings do not validate decisions; hence there is an implicit link to open meetings |

**Table 2: Characteristics of meeting initiation**

*Closed meetings*

Closed meetings had the same general characteristics of initiation but with less formality. Their agenda was typically shorter, less formal and developed only a day or two before the meeting, or even on the same morning. While the initiation still involved opening by the Chair, it tended to be less structured, sometimes even
asking the meeting participants about the key issues that the meeting needed to discuss. Agenda-driven control of the meeting was less important in closed meetings because the participants were typically from the inner top team circle and so less in need of advance preparation. As a cohort of elites engaged in strategy-making, typically these meetings were for the purpose of frank strategic discussion between top managers, particularly on contentious issues, as indicated by the expression that such meetings were places “to get blood on the carpet” (VC Modern). Second, these closed meetings were never formal decision-making bodies for the university. They were discussion fora for the top team that implicitly were linked to other meetings, as top managers needed to validate any issues from the closed meeting in more open meetings. These features of closed meetings enable greater suspension of organizational structures because top managers do not have to take account of other organizational members in their interaction. However, because they are not decision-making bodies, any variations that they propose will have to be re-coupled to the organization through links to other meetings. Table 2 summarizes these characteristics of the initiation mechanisms typical to strategy meetings and the extent to which they suspend organizational structures.

**Conduct**

The meetings in this study were all chaired by a top team member, who thus exerted some authority over the meeting’s conduct, particularly turn-taking in which participants must be acknowledged by the Chair in order to speak, unless the Chair specifically relaxes that authority. While the Chair cannot control the actual content
of any individual participants’ discussion, it does provide a set of structural and symbolic parameters around how that content may be presented (see also Bell, 1997). We now discuss three turn-taking characteristics that we found, free discussion, restricted free discussion, and restricted discussion, and their implications for suspending organizational structures, which are summarized in Table 3.

**Free discussion**

Free discussion involves the most suspension of organizational structures as the Chair suspends authority over turn-taking, enabling unstructured comments and responses on an agenda. While this was the typical mode of conduct in all closed meetings, it also occurred in open meetings. When an agenda was opened to free discussion, participants could speak spontaneously without seeking the acknowledgment of the Chair. Free discussion had two effects that were consequential for enabling reflection on existing strategic orientations: bolstering confidence and enabling the emergence of variation.

**Bolstering confidence:** First, free discussion might bolster the confidence of the meeting to propose a variation to the organization. For example, at Collegiate University a meeting of the Resource Planning Committee discusses the potential to take central control over a number of quite profitable journals that are owned by departments. Currently that revenue is not utilized at a university level and, often, because the journal editors do not have a commercial orientation, is simply accumulating without being used. Top managers are endeavouring to develop a more commercial strategic orientation within the university because of financial
pressures. The issue is opened to free discussion, which quickly coalesces around the proposition that the journals could be a sound earner for the university, particularly as they are launched electronically. However, discussion also highlights the likelihood of organizational resistance because journals are an academic endeavour and any central control over their revenue might be perceived as offensive. Participants point out that it is important not to offend the journal editors. Therefore, a working group is set up to examine how to administer this possible change and report back to the following meeting.

At the following meeting, an interim report from the working group is used to initiate another bout of free discussion. Participants talk freely about their interactions with the editors and the likely responses that this initiative will get. As discussion progresses, the meeting builds confidence that, despite probable organizational resistance, it is necessary to take commercial control of the journals because of the university’s accountability to the state funding body for all financial endeavours within the university. Risk and legal liability are raised as reasons why it is no longer appropriate to leave the journals under their current locus of control. The item attracts a lot of discussion, which concludes with a decision for the working group to continue their investigation and report back to another meeting.

In this example, free discussion allows participants to examine the pros and cons of the journals issue, reflecting on existing orientations towards commercial activity and academic endeavour that are potential sources of resistance. However, in free discussion the meeting is not constrained by these orientations. Rather, the meeting builds confidence about proposing this variation to the organization in ways that will increase organizational receptivity. This micro-variation, while seemingly
minor, represents a significant departure from existing strategic orientations as the academic body has been quite resistant to a commercial strategy. Central management of the commercial revenue from the journals is both practically a means of enacting a more commercial strategic orientation and also symbolically important in emphasizing that such academic activities will now adopt a commercial focus. The capacity of the meeting to propose such a micro-variation is, therefore, strategically consequential in the overarching evolution of a commercial orientation in the university. Free discussion, because it enables meeting participants to bolster their confidence to propose such a small variation and work through the issues involved in building organizational receptivity, is a vital component of a larger destabilizing of strategic orientations.

**Emergence of proposed variations:** Second, free discussion might enable the emergence of proposed variations in existing strategy. For example, a period of free discussion about an ongoing contentious issue within Entrepreneurial University, the ability to raise research grant and contract income, led to the proposition of a new structural mechanism for managing research activity.

During a university planning meeting, the top team are discussing the static research and commercial income figures for the 5-year forecasts. The issue has been opened to free discussion because the research figures have been a perplexing problem for a couple of years, despite various attempts to alter organizational orientation towards research income. As discussion progresses, the group agrees that static targets are unacceptable. They must set tough goals. One member of top team emphasizes the importance of the commercial orientation: “It’s simply not good enough. We must set TOUGH surplus plans of an increase each
year and we MUST achieve those targets which we have not been tough on in the past’. In the context of this discussion, the importance of increasing research income becomes apparent.

A second participant agrees with the speaker about the commercial orientation, suggesting a way to increase organizational receptivity to more commercial forms of research by altering the current monitoring and control procedures for handling income generation: “We need to have two committees, an academic side to handle and sort out academics and research contracts and an income side to handle the commercial and administrative side.” The Vice-Chancellor likes the suggestion: “Be tougher with academics to pull in more research income and get the commercial income up as well.” In the ensuing discussion, the meeting coalesces around the increasingly commercial orientation for the research strategy and, particularly, the structural means for proposing it to the organization. With reference to previous attempts to increase the organization’s commercial orientation towards research, another participant points out that "It's unlikely to be achieved by democratic means." The first speaker agrees: "It's got to be authorized or recommended from the top … You want to keep the surplus increasing which is realistic to ask for." The previous speaker reinforces the tough message they want to propose to the organization; “It’s not enough for research just to be good in itself. It has to have financial benefits as well.” Another participant reminds them that the increasingly competitive environment for research funding and for their commercial services means that people are already working very hard to achieve the current figures. Increased financial output is a lot to expect in the current environment. However, he agrees that they need to try.
Free discussion moves from emerging this proposed variation to the research strategy to a discussion of how to increase organizational receptivity to it, such as who might chair the new committees, the specific commercial and research targets that could be agreed with different departments, the incentives and punitive measures that they think might encourage and control the departments, and, based on their personal relationships with individuals, which of them would be best at negotiating the dual targets with each department …

Free discussion in the meeting enabled a significant structural variation to emerge and progress to the stage of considering ways to increase organizational receptivity to the proposed variation, which will introduce significant change into the structures of the organization\(^1\). Free discussion is thus an important means by which meetings suspend the structures of the organization sufficiently to reflect upon existing orientations to strategy and propose variations that might destabilize those orientations. Free discussion was the dominant mode of interaction in closed meetings, whereas open meetings iterated between free discussion and other forms of meeting conduct.

*Restricted free discussion*

Restricted free discussion is based on different principles to free discussion, although superficially it may appear very similar. Restricted free discussion occurred in open meetings and involved opening an issue to discussion in a similar way to free discussion. However, the Chair’s authority was used to shape the flow of discussion. For example, the Chair might interject value-statements that cast

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\(^1\) The first author had been observing this organization for nearly a year without any hint of such a change. Afterwards, in discussion with participants, she confirmed her impression that it had emerged through the meeting discussion, rather than being previously planned.
doubt on the speaker’s proposed variations, such as “Oh, blurring the agenda lines again” (VC at Entrepreneurial, in response to unwanted comment). Such interjections, while not reinstating turn-taking through the Chair, reinforce organizational hierarchy and authority structures by heightening participants’ awareness of the Chair’s authority to rein in discussion. For example, participants exchanged grimaces with a close colleague or subsided with a reddened face when the Chair inferred a value to their comments. For these participants the discussion was restricted, while other participants were made aware that only some types of ‘free’ discussion content were acceptable to the Chair.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Effects on suspension of everyday organizational structures</th>
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<tbody>
<tr>
<td>Free discussion</td>
<td>•Greatest suspension of the existing structures;</td>
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<tr>
<td></td>
<td>•Provides the opportunity for self-organising discussion;</td>
</tr>
<tr>
<td></td>
<td>•Enables proposals of variation to emerge out of participants’ discussion</td>
</tr>
<tr>
<td></td>
<td>•Builds participants confidence in proposed variations</td>
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<tr>
<td></td>
<td>•Dominant mode of interaction in closed meetings</td>
</tr>
<tr>
<td></td>
<td>•Can occur in open meetings where Chair relaxes authority</td>
</tr>
<tr>
<td>Restricted free discussion</td>
<td>•Authority of the Chair is a spectre in the background of discussion</td>
</tr>
<tr>
<td></td>
<td>•Privileges top managers’ by reasserting organizational authority structures, albeit covertly;</td>
</tr>
<tr>
<td></td>
<td>•Tends to suppress proposals of variation from participants by restricting self-organizing nature of discussion</td>
</tr>
<tr>
<td></td>
<td>•Occurred in open meetings which can iterate between all three modes of discussion</td>
</tr>
<tr>
<td>Restricted discussion</td>
<td>•Reasserts organizational authority structures</td>
</tr>
<tr>
<td></td>
<td>•Strict turn-taking mode mostly suppresses any self-organisation of discussion</td>
</tr>
<tr>
<td></td>
<td>•Opportunities for a proposal of variation are low and were not observed in this study</td>
</tr>
<tr>
<td></td>
<td>•Dominant mode of interaction in large open meetings</td>
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Table 3: Characteristics of meeting conduct
Even where interjections by the Chair could not cause meeting participants to circumscribe their discussion, the Chair could shape restricted free discussion
towards a desired resolution of an issue. For example, at Collegiate, on one issue the VC, in his role as Chair would not let ostensibly ‘free’ discussion settle upon the consensus emerging from the meeting participants. The issue in question deals with a substantial rise in student fees, which is at a stage of being agreed after discussion over several previous meetings. However, the VC as Chair clearly wishes to delay the rise because of recent bad press. The VC opens discussion by pointing out that, while a fee rise has been agreed in the past, it has been a source of unease and its implications need considering. There is then quite a lot of discussion as participants clarify the figures on which the fee increase has been proposed. Throughout this discussion, the VC keeps cautioning everyone to “keep an open mind on the matter”. He exhorts people to “have their say” but not to “get hot under the collar”. Discussion continues, with most of the meeting participants clearly committed to resolving the fees issue as they have been working towards this over several meetings. One participant points out “We’ve discussed all this last year. Last year we agreed we had to get the revenue up to help the university to make strategic investments and take risks and build resources as needed” and that he does not hear any arguments that detract him from this view. The VC keeps calling for a consensus, although the meeting participants are providing one; to increase the fees as proposed, as “every year we delay we make it harder to implement”. The VC again asks them to try to reach a consensus, at which one participant responds “I thought you’d got one, Sir”. Eventually, the VC’s restriction of free discussion has effect, as the meeting agrees to delay the decision on raising fees for another year. Thus, restricted free discussion differs from free discussion. In restricted free discussion, the hierarchical structures of the organization are
being reinforced as the Chair uses authority to restrict discussion and reinforce the existing strategic orientations and activities.

**Restricted discussion**

Restricted discussion involves formal structures of meeting conduct, of which the main mechanism is structured turn-taking. In structured turn-taking each member of the meeting is invited to speak in turn upon an issue. Structured turn-taking only occurred in open meetings. While restricted discussion enables every participant to have a voice it is different in character to either of the forms of discussion above. For example, in free discussion participants could respond freely to each others’ points and even in restricted free discussion, responses could be made, enabling some self-organizing debate to occur within the meeting. By contrast, restricted discussion inhibits the self-organizing character of discussion because development of comments through response and rebuttal is not possible. After their turn to speak, individuals cannot further develop their points, while spontaneous responses are delayed because any potential respondent must wait for their turn to speak. After one such meeting, when the other participants had left, top managers joked with each other about “Well, that really helped us with our strategic directions. Gave us a lot of steers” in reference to the lack of ideas arising from the meeting, while another top team member pointed out “but you don’t want them to have too much input” (Modern University). Thus, structured turn-taking restricts discussion, even as it enables the symbols of democracy to be asserted by giving each participant a voice. Restricted discussion involves the least suspension of organizational structures in terms of proposing variations to the existing strategic orientations.
During this form of meeting conduct, proposed variations to existing strategy did not emerge.

**Termination**

Finally, the episode must be terminated and re-coupling to the everyday organizational structures must be instated. Termination of an episode requires some ‘resolution’ of its issues, such as minutes, which enable a record of the meeting proceedings to be captured. These minutes facilitate two main characteristics of termination, depending on the degree to which an issue has been resolved within an episode; building bridges to other episodes or re-coupling to the organization, which are now discussed.

**Building bridges to other episodes**

In the termination of one episode, bridges to other episodes are built through the use of working groups and through rescheduling. These two termination mechanisms enable issues to be sustained for further discussion as both are documented in the minutes and prompt an agenda item for a subsequent episode.

**Working groups:** Working groups were a feature of all meetings, typically in response to almost any variation that was perceived as potentially threatening to organizational stability. Most proposed variations to the status quo were not resolved through a single episode. Rather, after some discussion a working group was nominated to investigate aspects of the proposal and report back in the next episode. This terminated discussion of the proposal during that episode but it also ensured that it remained on the agenda for the next episode. Working groups
prevent the existing strategic orientations from overwhelming initial proposals of variation by ensuring that a proposal resurfaces in subsequent episodes. This builds momentum through recurrent propositions of the variation, each time developing more sophisticated details and information as the working group becomes aware of new tasks to address between episodes. Working groups comprised some top team and some academic members of the organization. As academics represent various organizational factions, their involvement in the working group enhances the potential for organizational receptivity as the proposal progresses through a series of episodes. For example, the proposal to take central control of the income from academic journals at Collegiate, explained in the section on free discussion above, was pursued over a series of episodes through the use of working groups comprising academics and a top manager. Working groups enable proposals of variation to persist and provide opportunities for reflection to occur over several episodes. They increase the chances of organizational adoption of the proposed variation both through their composition and their persistence, as meeting participants become inured to the potential threats to organizational stability, acquiescing with or even actively supporting the proposed variation.

**Rescheduling:** Rescheduling discussion of proposed variation for a future episode also builds bridges between episodes by delaying decision on the variation, typically on the basis that more information is needed (see also Cohen and March, 1986). For example, at Entrepreneurial University an issue involving growth of capital infrastructure was raised in March at the first financial planning meeting of the year. At that meeting, free discussion about the proposal appeared unfavourable because of uncertainty over the financial climate and questions about
whether the University should grow in the proposed direction. However, free
discussion also enabled reflection to occur and the issue was not abandoned but
rescheduled for the subsequent episode. It appeared at the next four financial
planning meetings, each time being rescheduled on the basis that the university
should wait until further information was available. Finally, in October, a decision
was made to pursue the growth of capital infrastructure. While the financial climate
had not changed dramatically, rescheduling had provided time to reflect on the
problem, propose possible financing solutions, and overcome initial doubts. This
example explains how rescheduling builds bridges between episodes by providing
time to build momentum about a proposed variation that might otherwise be
abandoned. Rescheduling and working groups have common characteristics. The
working group actively seeks more information as a way of building bridges
between episodes while rescheduling is a more passive way of allowing that
information to emerge between episodes. Both draw upon legitimate meeting
structures, such as minutes, to ensure that the proposed variation will be tabled as
an item in future episodes, giving opportunities for ongoing reflection and increasing
organizational receptivity to the variation.

Re-coupling to the organization

Termination also involves variations that have been resolved as far as possible
within the capacity of the particular meeting. At this stage, the proposed variation is
re-coupled to the organization, typically through some form of wider organizational
validation. For example, proposed variations were usually presented to the
Academic Board or some other large organizational gathering. These final
presentations are also episodes which, because they involve a large number of organizational actors, are very open and, therefore, very bound by organizational structures, such as adherence to the agenda and restricted discussion. We found two mechanisms for re-coupling a proposed variation to the organization that had different implications for organizational receptivity; voting and 'stage-managing re-coupling'.

**Voting:** Voting is used when variations can no longer be sustained through working groups or rescheduling. Voting only occurred twice in the 51 meetings we observed, both times on contentious proposed variations that had not been able to reach a more consensual form of resolution. In the two instances of voting observed, one was ineffective at proposing variation as the vote did not support the proposal, while the other did support the proposed variation but could not be actioned because it was only successful by a single vote and so did not have sufficient support to meet a receptive organizational context. Voting thus appears to be an ineffective termination mechanism for destabilizing existing strategic orientations.

‘Stage-managing re-coupling’: ‘Stage-managing re-coupling’ highlights the importance of shaping receptivity in the organizational context, as most organizational members have not been party to the meeting processes. Even when a proposed variation has been worked through extensively, using the various conduct and bridging mechanisms described above, it has to be presented to the wider organization in ways that increase the chances of meeting a receptive organizational context for its selection. We found a typical termination mechanism that we labelled ‘stage-managing re-coupling’ (see also Peck et al, 2004) because it considers organizational audience’ responses to a proposed variation. For example,
following a series of departmental ‘strategic direction-setting’ meetings at Modern University, at which top managers had used a questionnaire to canvas departmental views on a range of strategic issues, top managers had made decisions about the strategic parameters for the following year. While these parameters were no longer negotiable, care was taken to stage manage their presentation in order to increase their acceptability at a Staff Strategy Day. The Deputy Vice-Chancellor who was chairing the day suggested changing the wording of the item on the initial Strategy Day agenda from ‘Results of the Questionnaire’ to ‘The Views of Departmental Heads’. The wording of the presentation was then discussed in order to make it more participative and democratic in tone.

Similarly, at Collegiate, where decisions recommended by the main Resource Planning Committee (RPC) must be approved by the Academic Board, proposed variations such as central control of the commercial revenue from journals is carefully stage-managed. The RPC meeting emphasizes the importance of pedantic wording in their report for Academic Board. One participant says “I really think this is one where we need to tread carefully. We are in danger of being a bit too cavalier”, while the DVC and the Registrar point out that they can highlight the fact that internal auditors have said the journals are important in pursuing value for money. They discuss how to propose it without “getting the editor's backs up”, coming up with the suggestion that they ask the Board to nominate a journal representative who can be on a Journal Sub-Committee to manage commercial revenue from journals. They then move on to another item of their report to Academic Board, where nerves about shaping organizational receptivity are expressed in a joke that they should “Confuse the poor things. All turn up and
“dominate the Board” and suggestions for a “useful red herring at the Board”. Eventually, when the journals issue is presented to Academic Board, there is a single carefully worded paragraph in the agenda, stating that the RPC recommends that the journals come under the auspices of a journals sub-committee of the RPC because of their legal status and the obligations placed on the university in the event of financial problems; the scope for increasing revenue by raising subscriptions; and the scope for reducing production costs. Presentation of the issue explains each of these points briefly, and summarizes the working group process used to reach this decision. The neutral tone of the wording and the evidence that a ‘consultative’ working group process has been used in decision-making enhances organizational receptivity; the initially contentious variation is accepted as part of an evolving commercial strategic orientation. These examples of discussions, jokes and detailed attention to wording highlight the importance attributed to stage-managing proposed variations at the point where they re-couple to the organization. In all of the instances of stage-managing re-coupling we observed, the proposed variations were accepted with little discussion or dissent by the organization.
<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Effects on re-coupling to everyday organizational structures</th>
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| Placing item in minutes | • Enables a record of meeting outcomes  
  • Where proposed variations are not resolved, ensures that they can be legitimately raised in other meetings |
| Working groups | • Provide bridges for proposed variations from one meeting to another  
  • Enables variations to persist and be actively developed, typically over several meetings |
| Rescheduling | • Provides bridges for proposed variations from one meeting to another;  
  • Enables variations to persist until there is an opportunity (more information) for decision |
| Voting | • Occurs when a proposed variation can no longer be sustained through working groups of rescheduling  
  • Typically occurs when organizational receptivity for proposed variation is low  
  • Tends towards de-selection of the proposed variation |
| Stage-managing performance | • Occurs when a proposed variation is resolved within the meeting remit and ready for introduction to the organization  
  • Considers likely organizational response to proposed variation  
  • Tends to increase organizational receptivity to proposed variation by managing organizational response |

Table 4: Characteristics of meeting termination

Termination mechanisms are central in establishing links between episodes and in re-coupling proposed variations to the wider organization. As summarized in Table 4, the termination mechanisms for building bridges between episodes, such as working groups and rescheduling, enable proposed variations to be sustained across episodes, so increasing the likelihood that they will be developed to the extent that they can destabilize existing strategic orientations.

SECOND ORDER ANALYSIS: A TAXONOMY OF STRATEGIZING EPISODES

The first order analysis answers the first research question by explaining the characteristics of meetings as strategizing episodes and partially answers the second research question by discussing how particular characteristics may be prone to either stabilize or destabilize strategy. In the second order analysis, we
take the answer to the second research question further by examining the nature of particular strategy episodes and the process involved in linking episodes to the stabilization or destabilization of strategic orientations. All of the episodes were examined chronologically, tracing several issues through a sequence of episodes. We found an association between the suspension of organizational structures within episodes and three phases of the micro-evolutionary process of constructing variations to existing strategic orientations; proposal of a variation, developing that variation, and having a variation selected, meaning it is accepted at the point of re-coupling to the organization or unselected, meaning that it is abandoned. This analysis resulted in a taxonomic classification of episodes according to the extent to which they suspend organization structures and the role they play in proposing, developing and selecting variations to existing strategy. Figure 1 illustrates this taxonomy of episodes and the relationships between them in shaping variations to existing strategic orientations, which are summarized in Table 5. While it is not possible to show all the data, Appendix A provides a representative sample of the data underlying the taxonomy and illustrates different micro-evolutionary paths that proposed variations took through the different types of meeting.
Theoretically, the temporary suspension of organizational structures during strategizing episodes enables sufficient removal from the daily enactment of existing activity to reflect upon and propose potential variations to the status quo (Hendry and Seidl, 2003; Luhmann, 2000; Seidl, 2005a; 2005b). Our findings confirm this theoretical proposition, contingent on the type of episode and its particular characteristics. As Figure 1 and the examples in Appendix A show, variations are typically proposed at closed meetings (1) and at open meetings with free discussion (2), both of which have the most suspension of organizational structures. Meeting initiation mechanisms in closed meetings, such as the loose agenda and relaxed authority of the Chair, tend to suspend organizational structures, so that free discussion is the dominant mode of interaction in these
meetings (e.g. A, G, I, Appendix A). Similarly, open meetings with free discussion enable variations to be proposed, such as the structural change to the research strategy at Entrepreneurial or the change to control mechanisms at Collegiate (e.g. B-F, H, Appendix A). Because free discussion involves suspension of organizational structures, it is able to be self-organizing (Luhmann, 1990; 1995; Seidl, 2005a). This self-organizing nature of free discussion utilizes the potential of the episode to step outside the organizational structures, engage in discussion of potential variations, and as shown in our examples, develop confidence about proposing these variation to existing strategy (Doz and Prahalad, 1987; Hendry and Seidl, 2003; Roos and Von Krogh, 1996). The temporary suspension of organizational structure found in closed meetings and in open meetings during free discussion is thus central to the proposal of variations that might destabilize existing strategic orientations.
Variations are unlikely to be proposed, as the meeting format is not receptive to them. Variations may be selected without further development or moved to a final forum for selection/unselection.

Organizational structures are reasserted in the background of the discussion.

Proposed variations are developed.

Proposed variations are periodically re-introduced to open meetings, where they may be:
- Furthered in the development process by ongoing working group action or decision to propose the variation to the wider organization
- Unselected without further development

Variations are unlikely to be proposed, as the meeting format is not receptive to them.

Variations are likely to be either unselected without further development or moved to a final forum for selection/unselection.

Proposed variations are introduced to the organization, where receptivity of context to their selection is indicated by the termination procedures:
- 5a) Voting indicates low receptivity and tends towards unselection
- 5b) Stage-managing re-coupling indicates greater receptivity and tends towards selection

**Table 5: Types of meetings in proposing, developing and selecting variations**

**Development**

On its own free discussion is not sufficient for a proposed variation to destabilize existing strategy. Closed meetings, in the university context at least, but most likely in other political, professional and public policy contexts (e.g. Adams, 2004; Tepper, 2004; Terry, 2001) lack formal legitimacy in making decisions without recommendation to some other body. Therefore, as summarized in Table 5, illustrated in Figure 1 and exemplified in Appendix A, closed meetings are sequentially linked to other meetings, in which the Chair’s authority over the agenda ensures that any proposed variation can be incorporated for discussion. Even in
open meetings that have formal decision-making authority, initial proposals of variation usually need to be further developed, indicating sequential links to other meetings before they are introduced to the wider organization (see Appendix A). Development is enabled by building bridges between episodes, such as working groups (3) or rescheduling for further discussion (2), so that conversation about the variation may be kept open and it may continue to be considered. Working groups, which serve as bridges between more formal episodes, such as open meetings, are also classified as episodes that suspend organizational structure because they bring together a group of people who normally do not work together to undertake a task they normally do not do and require them to interact until the task has been completed. Because working groups suspend organizational structure, they enable a variation to persist and to gain momentum through iteration with one or more open meetings, as indicated by the double-headed arrow in Figure 1. They are thus central in developing a variation.

In this study, variations were not proposed at open meetings with restricted free discussion (4). During restricted free discussion organizational structures are reasserted, albeit in the background, which restricts the self-organizing nature of discussion. While these types of meetings might potentially surface a variation to existing strategy, it is unlikely to be acknowledged but rather suppressed in favour of reasserting strategic stability. Our study indicated that meetings with restricted free discussion enable top managers to exercise their privileged position within the conduct of episodes. Because they are able to shape the nature of discussion, they can use such meetings to shape the un-selection of a variation that they do not favour, as indicated in C and F in Appendix A. Variations are not always unselected
during restricted free discussion, as this form of meeting conduct can also be part of the sequential development of a variation, passing it through a series of episodes to increase its visibility and, hence, momentum, on the way to a final re-coupling episode, as in example H, Appendix A. However, if a variation is mainly developed through restricted free discussion, it is unlikely to provide sufficient suspension of organizational structure for confidence and momentum about destabilizing existing strategic orientations to occur, so that the variation will be unselected upon re-coupling to the organization. This is evidenced in the proposed variations to teaching orientations at Modern, which was only exposed to a series of restricted discussion meetings before being unselected at a final meeting (see I, Appendix A). Restricted free discussion may thus serve the interests of top managers in unselecting variations or may be used to pass variations through an evolutionary path, but holds the risk of un-selection ultimately, if it is the primary mechanism used to develop a variation.

Finally, a proposed variation will reach a termination point, which means that it must be resolved in some way and re-coupled to the organization. At this stage, as illustrated in Figure 1, most proposed variations are moved onto the agenda of an open meeting with restricted discussion (5). While such meetings have the least suspension of organizational structure and so, do not enable proposed variations to emerge, they are important in the selection of variations. The function of open meetings with restricted discussion is to draw symbolically on assumptions of democracy within organizational structures in order to validate proposed variations as part of the wider organizational decision-making process (Schwartzman, 1989; Simon, 1997; Terry, 2004; Weick, 1995). These meetings are thus indicative of the
receptivity of organizational context to any proposed variation. Where a variation has been developed through a series of episodes, with opportunity for free discussion, it is likely to have considered receptivity of context during its progress, so that it can be stage-managed for presentation to the organisation at a large open meeting with restricted discussion, such as an Academic Board. Stage-managing the termination of a carefully-nurtured variation increases the chances of that variation contributing to the destabilizing of existing strategy (5a), as shown in examples A, D, E, G, H in Appendix A. By contrast, if a variation has not been developed by going through a series of episodes, during which it can be carefully shaped with consideration of the context, it is likely to be a source of contention when it attempts to re-couple to the organization. Organizational receptivity in the final episode is thus likely to be low, requiring the meeting to resort to mechanisms such as voting (5b) in order to gain a resolution about the proposed variation (Olsen, 1972). Voting is indicative of low organizational receptivity (Bailey, 1965) and, in this study, led to proposed variations being unselected (see I, Appendix A).

This taxonomy of meetings and the way that progression through the taxonomy shapes the micro-evolutionary path of a proposed variation, illustrates how different types of meetings as strategizing episodes contribute to the stabilizing or destabilizing of organizational strategy. The characteristics that we identified in the initiation, conduct and termination of an episode all contribute to the suspension of organizational structures. Greater suspension of organizational structure is important for the initial proposal of variation (1 and 2). Suspension of organizational structure, combined with sequential links between episodes is important for developing the variation and enhancing its chances of selection (2 and 3). Lower
suspension of organizational structure is important in terminating the path of a proposed variation and re-coupling it to the organization (4 and 5). The specific termination mechanisms indicate the receptivity of the organizational context to selecting the variation, with its potentially destabilizing effects on existing strategy (5a and 5b). The second order analysis thus contributes a more complete answer to question two on the implications of strategy meeting’ characteristics for stabilizing or destabilizing an organization’s existing strategic orientations.

CONCLUSIONS

This paper has addressed two exploratory research questions on the nature of strategy meetings as strategizing episodes and their implications for stabilizing or destabilizing an organization’s existing strategic orientations. In answering these questions, our findings make three main contributions to existing theory. First, our paper elaborates and extends Hendry and Seidl’s (2003) theoretical framing of strategizing episodes as micro evolutionary mechanisms that suspend organizational structures, serving to destabilize existing strategy by providing opportunities for reflection that enable variations in strategy to be proposed and potentially selected by the organization. In this paper, we illustrate that, empirically, the demarcation between organization and strategic episode is not as clear as their framework implies. Rather, some episodes, such as closed meetings tend to have greater suspension of organizational structures while large open meetings tend to have organizational structure still very much in evidence. Other meetings iterate between greater and lesser suspension of organizational structures, depending on features of their conduct, such as the extent to which discussion is free or
restricted. Thus, Hendry and Seidl’s theoretical proposition that suspension of organizational structure is associated with proposals for variation in existing strategy is confirmed but, through empirical application, a more nuanced understanding of the iterative relationship between organizational structure and episode is developed.

Our results also extend their framework. We develop a taxonomy of episodes to show how greater or lesser suspension of organizational structures is inherent in the specific characteristics of initiation, conduct and termination (see also Tables 2-4) and that this degree of suspension shapes the initiation and development of a proposed variation to existing strategy. This taxonomy extends their concept of episode by showing differences in the way that episodes are structured and the different implications that this has for stabilizing or destabilizing organizational strategy. In particular, we extend their concept of episodes as micro-evolutionary mechanisms for shaping organizational strategy, by developing an empirically informed micro-evolutionary path that variations take from proposal, to development, to selection or un-selection, according to the specific characteristics of conduct within episodes. This extension of Hendry and Seidl’s framework provides a basis for others to conduct research into strategizing episodes and trace the specific micro-evolutionary influences that they have upon an organization’s strategic orientations. Future research might look further at meetings but also examine other organizational events, such as workshops and awaydays, which might also serve as episodes in shaping strategy (e.g. Hodgkinson et al, 2005; Johnson et al, 2005).
Second, our findings contribute to the literature on meetings, which remain under explored phenomena despite their prevalence in organizations (Boden, 1995; Schwartzman, 1986; 1989; Weick, 1995). This study confirms that meetings, despite their ritualistic nature, can indeed be more than symbolic ‘rubber-stamping’ exercises (Adams, 2004; Peck et al, 2004; Tepper, 2004; Terry, 1987). While extant research suggests that meetings are consequential activities in shaping wider organizational activity (e.g. Boden, 1995; Schwartzman, 1989; Seidl, 2005a; 2005b), there is little empirical evidence to indicate how this occurs. Furthermore, while meetings are considered to keep topics alive within organizations and to give rise to other meetings (e.g. Peck et al, 2004; Schwartzman, 1989; Tepper, 2004), there has been little systematic research into the relationships between meetings, how this varies according to the particular characteristics of the meeting, or the implications of meeting characteristics and relationships for shaping wider organizational activity. By drawing upon Hendry and Seidl’s (2003) framework we provide a systems-theoretical basis (Luhmann, 1990; 1995) for analyzing the characteristics of meetings and the relationships between them. Our first-order analysis provides evidence of the functions that specific meeting characteristics, such as agendas, chairing, minutes and forms of discussion, serve in suspending organizational structures and how this varies according to whether a meeting is open or closed. The taxonomy derived from our second-order analysis shows how meetings are related to each other, how they keep topics alive, and the implications of different forms of meeting for shaping strategy. Our paper thus provides an empirical answer to many questions raised in the nascent literature on meetings as well as providing a theoretical framework and conceptual taxonomy which others
may use to conduct further research into meetings within a wider sample of organizations.

Finally, this paper contributes to research agendas in the broader field of strategy as practice, which propose that we study how the micro details of action and interaction within organizations shape strategy as a socially accomplished activity (Hendry, 2000; Jarzabkowski, 2004; 2005; Johnson et al, 2003; Whittington, 2002; 2003). In particular, this agenda calls for studies that can utilize the micro details of organizational activity to explain outcomes that are strategically consequential for the organization. We examine one aspect of organizational activity in detail, strategy meetings, and, by linking this into broader theoretical frameworks on the nature of episodes (Hendry and Seidl, 2003; Luhmann, 1990), illustrate how such micro activities contribute to the stabilization or destabilization of organizational strategy.

The findings from this study have implications for practice. Managers in democratic, consensus-based contexts such as universities, which typically have diffuse power relationships and multiple and ambiguous goals, are under increasing external pressure to generate a coherent strategic response from their organizations, whilst at the same time being constrained in their ability to act by management fiat (Denis et al, 2001; Slaughter and Leslie, 1999). Managers in such contexts might use the findings here to reflect upon their own skills in shaping the structure and conduct of democratic governance mechanisms, such as meetings, and how these might be better employed to enhance both proposals for strategic change and also organizational receptivity to change.
A limitation of this study is that it has been conducted in a single sector. However, in keeping with other professional organizations, such as hospitals, cultural organizations and policy-making bodies, universities tend to have diffuse power relationships and low capacity to act by management fiat (Denis et al, 2001). In such contexts, meetings prevail as governance mechanisms (Simon, 1997; Terry, 1987). Therefore, our findings are expected to have relevance in these other contexts that share characteristics with universities.
REFERENCES


Appendix A  
Evolutionary proposal, development and selection path of a representative sample of variations

<table>
<thead>
<tr>
<th>Variation</th>
<th>Description</th>
<th>Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td>A: Selected variation</td>
<td>Developing a new department at Entrepreneurial as part of evolving orientation of the institution’s disciplinary profile. The suggestion for a major new department was proposed in a closed meeting (1), then developed through serial iterations between open meetings with free discussion (2) and working groups (3), during which the strategic, financial, resource allocation and social and political details were progressively worked out, enabling the proposal to be accepted by meeting participants as good for the strategic profile of the University. It was then stage-managed at two large open meetings (5a) and formally accepted. The new department was subsequently developed (after the end of this study), altering the funding and disciplinary profile of the University.</td>
<td>Proposed at 1, developed through iterations between 2 and 3, followed by selection through 5a.</td>
</tr>
<tr>
<td>B: Selected variation</td>
<td>Changed administrative structure to shape growing commercial orientation in research strategy at Entrepreneurial. A new administrative structure for addressing a growing concern over the amount of income generated from research activity was proposed at an open meeting with free discussion (2). This proposal marked an evolution in the University’s research orientation, which now had to meet dual goals of academic excellence and commercial viability. Resource allocation and social and political aspects of the proposal were worked out over a series of iterations between open meetings with free discussion (2) and working groups (3). (This study was completed prior to the proposition to the organization but we later found that the new structure was implemented and a commercial research orientation became part of the University’s strategic priorities).</td>
<td>Proposed at 2 and developed through...</td>
</tr>
</tbody>
</table>
iterations between 2 and 3.

C: Unselected variation – attempt to change current resource-allocation and control infrastructure at Entrepreneurial. This variation to the existing strategic planning and control mechanisms was proposed at an open meeting with free discussion (2), where some participants thought it would be a better way to shape strategic orientations towards research and teaching, as it would devolve strategic control directly to departments. The proposal, while unpopular with top management, built sufficient momentum through free discussion to be developed through a sequence of two working groups (3), which reported back into open meetings where restricted free discussion took place (4). Restricted free discussion eventually led to the proposal favouring top manager's view, being unselected, so that the existing planning and control mechanisms remained in place. Pattern: Proposed at 2, developed in 3 and reported into 4, where it was unselected.

D: Selected variation – change locus of control over revenue from academic journals to shape more commercial strategic orientation at Collegiate. This proposal arose at an open meeting with free discussion (2), as part of a wider movement to strengthen the University’s commercial orientation. It was initially seen by meeting participants as a contentious and very destabilizing proposal. However, through serial iterations between working groups (3) and open meetings with free discussion (2), the social and political aspects were worked through, as well as the necessary administrative changes. It was then carefully stage-managed at a large open meeting with restricted discussion (5a), where it was accepted and subsequently implemented, constituting part of a shift in the University’s commercial orientation. Pattern: Proposed at 2,
developed though iterations between 2 and 3, followed by selection through 5a.

**E: Selected variation** – change current resource allocation and control infrastructure at Collegiate. This proposal to alter the existing strategic planning and resource allocation infrastructure, in order to take stronger central control over the strategic orientations and activities of academic departments was proposed at an open meeting with free discussion (2). It was seen as contentious, as it constituted a major shift in existing control mechanisms. However, participants convinced themselves during free discussion that greater control was essential to the University’s survival. They, therefore, worked through the administrative, social, and political issues in a series of iterations between working groups (3) and open meetings with free discussion (2), developing it into a proposal that they felt would be acceptable to the wider organization. The proposal was then stage-managed at a large open meeting (5a) and accepted, whereupon it began to be implemented at the close of this study.

*Pattern: Proposed at 2, developed through iterations between 2 and 3, followed by selection through 5a.*

**F: Unselected variation** – attempt to change student fees to reflect changes in commercial and teaching orientations at Collegiate. An increase in student fees had been proposed at an open meeting with free discussion (2). While participants acknowledged that this was counter to the University’s ethos of preserving all academic disciplines equally, regardless of their ability to attract high fee-paying students, during free discussion they came to the conclusion that it was part of a commercial orientation that was essential to the University’s survival. They worked through the social and political issues of changing fee structures according to
marketability of courses through a series of working groups (3) and open meetings with free discussion (2), at which they found ways to mitigate some of the disciplinary implications of the change and make it more organizationally acceptable. However, the University came under criticism from the press for its elitist stance in raising fees, so that the proposal lost favour with top management. At a meeting to finalise the proposal, top managers managed to delay it through restricted free discussion (4), so that it was unselected (postponed indefinitely). Pattern: Proposed at 2, developed in iterations between 2 and 3 then moved to 4, where it was unselected.

G: Selected variation – developing partnerships that shape changing strategic orientations towards teaching and commercial income at Modern. As Modern was in an increasingly constrained financial position, development of industry, professional and further education partnerships was proposed at a closed meeting (1), as a means of enhancing the University’s commercial orientation. These partnerships would mean significant changes in departmental orientations towards teaching and towards the University status as a provider of high quality undergraduate educational programmes. However, the administrative, social and incentive mechanisms were worked through a series of working groups (3) and open meetings with free discussion (2), developing the proposal into something that it was felt the wider University community could accept. The proposal was then stage-managed at an open meeting with restricted discussion and accepted (5a), whereupon it was implemented within departments (a number of new partnerships were developed after the end of this study) Pattern: Proposed at 1, developed through iterations between 2 and 3, followed by selection through 5a.
**H: Selected variation** – closure of a department at Modern, as part of an evolving commercial-viability orientation in the institution’s disciplinary profile. As part of the evolving commercial orientation at Modern, the proposal to close under-recruiting departments arose within an open meeting with free discussion (2). This was a change to the existing approach to the University’s disciplinary profile, which had not been commercially driven. Further developments occurred at a closed meeting (1), with the proposal to close a specific department that was under-recruiting despite investment of resources. The proposal was introduced to the wider group at an open meeting with free discussion (2), where it gained momentum and acceptance as a necessary move, before moving to another meeting forum, involving restricted free discussion (4) at which the proposal was legitimated with little discussion. It was then stage-managed at an open meeting with restricted discussion (5a), as a necessary step in ensuring the University’s survival and selected and implemented as part of an evolving financial-viability strategic orientation for departments. *Pattern: Initially proposed at 2, developed as it moved from 1 to 2 to 4, followed by selection through 5a.*

**I: Unselected variation** – attempt to change academic year at Modern in order to shape a change in strategic priorities away from intensive classroom-based teaching to accommodate wider strategic orientations towards research and commercial income. In an attempt to shift the strategic orientations at Modern away from its dominant historical basis in undergraduate, classroom-based teaching, towards other goals such as research and income generation, a proposal to restructure and shorten the academic year originated at a closed meeting (1). The proposal iterated through a series of open meetings at which there was restricted free discussion (4), finally being
proposed to an open meeting with restricted discussion, at which it became apparent from the turn-taking comments that there was no consensus, leading to voting (5a), at which the proposal was unselected and the existing structure of the academic year was reinforced, stabilizing the historical classroom-based teaching orientations. *Pattern: Proposed at 1, developed over a series of 4, followed by 5b, where it was unselected.*