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Virpi Sorsa

Discourse and the Social Practice of Strategy

Of Interaction, Texts, and Power Effects

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Discourse and the social practice of strategy: Of interaction, texts, and power effects

Key words: strategy, practice, interaction, discourse, communication, textual agency, power

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Virpi Sorsa
Hanken School of Economics
Department of Management and Organization
P.O.Box 479, 00101 Helsinki, Finland

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PREFACE

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1 INTRODUCTION

1.1. Background

I used to work as a planning officer in a university consortium before I began to write this thesis. One of the most interesting tasks in that job was *to write* a strategy about the consortium's role in the development of that specific region where the university units were located. I emphasize the word "write" because I was not a senior administrator in the executive group of this university consortium (or, as expressed in the business world, a manager in a top management team, hence TMT), but I was a secretary and prepared the material for the senior executives, wrote memos and minutes of the strategy meetings and seminars of the TMT, and prepared the drafts of the official strategy text. As a sociologist, I hadn't had much experience about strategic management but I saw this task as an opportunity to practice analytical and reflexive thinking in the information processing that I was assigned to do. Yet this new language of "SWOTs", "missions" and "visions" seemed to be glorifying a very simple idea, to create a reason for employees and decision-makers to do meaningful work.

I soon discovered the power that was embedded in this language. I realized that the words and sentences written into the strategy draft were not insignificant but resulted in often almost tangible tensions in the TMT. The head of a business school introduced himself as a specialist by referring to Mintzberg's, Alstrand's and Lampel's (1998) Strategy Safari and the various ways that the strategy could be formulated. The head of the social science unit mastered the in-depth analysis of the organizational environment and exercised authority through this reflexivity. In addition, the secretary general of the university consortium aimed to construct unanimity between the different unit heads. In fact, the analytical writing task that I was assigned to do was not at all unfettered because besides my supervisor, the other senior executives were dropping into my office or calling to give their views and "advice" about how the issues should be framed in the next strategy draft and TMT meeting. The job that had begun as an interesting analytical task was suddenly a work of "secretarius" (confidential officer) in the middle of "back stage" haggling and deal making.

One particular memory that I have carried along since those days was the writing of a sentence in the strategy text that was not agreed on in the TMT's meetings but which one of the key members proposed there. I knew that there were people for and against, but he was determined to print and publish the strategy with this specific sentence. The sentence was also formulated and hidden in the text in a way that it would not draw the TMT's attention. This action could not be understood without the knowledge of interaction and texts in strategy processes – the interaction and texts that both enable and constrain organizational strategizing and other action. In a very recent academic publication, Denis, Langley, Dompierre and Rouleau (2011) showed how strategic ambiguity that resulted from managerial interaction and was reified in a strategic text of three merging public hospitals escalated indecision over many years, producing little concrete strategic action. I left the university consortium before I could discover what kinds of actions the hidden and ambiguous sentence resulted in. And so partly inspired by these experiences, this thesis is about interaction, texts and power effects, and the events and actions analyzed in this thesis will be illuminating for those interested in these intriguing practices of strategy.

More importantly, this thesis can be read as lying at the emergence of a new subfield of strategy research – strategy discourse studies – that have in recent years grown into a specific research area. The significance of this thesis is that it explains and illustrates how this research area can contribute to strategy research in particular and to

organization studies in general. Strategy discourse studies were already introduced more than two decades ago (Knights & Morgan, 1991, 1995) but as a discipline, it has just begun to bloom (e.g. Mantere & Vaara, 2008; Kornberger & Clegg, 2011; Rouleau & Balogun, 2011; Spee & Jarzabkowski, 2011). Discourse in the Foucauldian sense refers to the knowledge-power relationship that constitutes the condition of possibilities that often pass unnoticed (e.g. Allard-Poesi, 2010; Kornberger & Clegg, 2011). Discourse in strategy research also relates to rhetoric (e.g. Jarzabkowski & Sillince, 2007), language in use (e.g. Samra-Fredericks, 2003, 2004, 2005, 2010a), talk and texts (e.g. Spee & Jarzabkowski, 2011), and various heterogeneous ways in which people play with concepts (e.g. Seidl, 2007). Strategy discourse studies, thus, offer different theoretical routes to capture what is going on in organizations' practices and in society more broadly. However, these different ways of employing discourse analysis and its potential in strategy research have not been thoroughly examined (Vaara, 2010). Thus, this thesis examines the potential of different kinds of discursive and communicative thinking in strategy research and argues that the social practice of strategy is essentially interaction, texts and power effects.

The research question examined in this thesis is how strategy enters into and figures in the daily lives of people in organizations. This question is important because strategy and related practices are among the most important managerial practices whether we enter multi-national business organizations, hospitals, arts organizations, universities, churches, or city organizations. The practice of strategy – the managerial elite's strategy workshops, the writing of official strategy documents and the employees and interest groups various innovative ways of interpreting and using of those documents – has become commonplace, legitimate and even expected in contemporary organizations.

Particularly interesting is that public sector organizations adopt these managerial practices and institutionalize them in their pluralistic contexts characterized by multiple objectives, diffuse power, and knowledge based work processes (Denis, Langley & Rouleau, 2007). Although strategic practices may have powerful effects in all organizations, the politically and ideologically charged nature of management in the pluralistic contexts such as a city or a church government, offers purposeful settings for the analyses of this thesis. In addition, the organizations examined in this thesis have developed their strategic management practices over a number of years, which enables examining the effects of the social practice of strategy that I am interested in.

The contributions of this thesis are presented in six essays; two published ones and four work-in-progress essays. The first two published articles examine texts and their power effects. I will show with Eero Vaara and Pekka Pälli that strategy texts are not only carriers of goals and purposes but these texts also carry political and ideological struggles, which are produced and reproduced in organization's actions. We also show that strategy texts recontextualize a specific institutionalized genre, which is intrinsically definitional. This explains why although strategy texts and talk aim to define the meaning of organizational action, those simultaneously include statements that leave room for different understandings.

The next three essays examine interaction from different angles. First, the essay written with Eero Vaara develops an empirically validated model that elucidates the rhetorical strategies through which strategic plans are crafted, influence is exercised, and authority constructed in strategic planning meetings. Second, the essay written with Pekka Pälli and Piia Mikkola examines "dialogic appropriation" (Bakhtin, 1986) of strategy in performance appraisal interviews and argues that participants construct through discursive practices strategy as a social phenomenon that is embodied, intertextual, and material. Third, the fifth essay examines a socially constituted tension between senior managers in a strategic planning meeting and shows how this TMT constitutes a reality in which strategy is authoritative, resulting in face-saving practices

as well as an enforced domain of participation obligations. What is interesting in this analysis is that the created tension is not between the superiors of the head office and those who are targeted by the strategy, but within a TMT and how the participants of the TMT resolve such tensions in the minutiae of strategy meeting practices.

The final essay explores agency. We reflect with Eero Vaara and Ann Langley earlier contributions of strategy literature by problematizing the notion of "agency" in relation to strategy. Our processual analysis of a longitudinal case study in a Nordic city organization illustrates the multiple forms and sources of agency that intervene in the institutionalization of strategic planning and its role in the city's action. Specifically, we focus on three forms and sources of agency that we argue play important interacting roles in strategy formation – managerial agency, discursive power and textual agency – each of which relates to a different subset of the organization theory literature. Our analysis highlights that underneath the interplay, there are inevitable tensions incorporated in the constitution of the organizational strategy in strategic planning processes.

Overall, these contributions highlight the importance of understanding of the role of interaction and texts in the creation of power effects, agency, and the very possibility of social practice of strategy.

1.2. Strategy as practice

The insights of Henry Mintzberg and his colleagues about how strategy emerges at the grassroots of an organization instead of through deliberate planning and implementation set a challenge to strategy researchers to focus on what is actually going on in the organization's real world (e.g. Mintzberg, 1978; Mintzberg & McHugh, 1985; Mintzberg & Waters, 1982, 1985). Their seminal work in the field of strategy process research opened a new avenue for those interested in the details of individuals' actions in complex organizational processes. In many ways, we can see that those studies that we today call strategy as practice, or strategizing activities and practice (hence SAP), have followed the inductive research orientation introduced by the strategy process scholars.

However, the SAP scholars have paved the way for a new research agenda by criticizing the strategy process counterparts for their individualist focus on micro-level managerial activity and roles "leaving larger social forces on one side in an under-theorized category of 'context'" (Whittington, 2006; citing Tsoukas, 1994 and Willmott, 1997). Furthermore, some have argued that the critique that process scholars have directed towards rational planning (Mintzberg & McHugh, 1985; Mintzberg & Waters, 1985) and strategic choice (Child, 1972; Pettigrew, 1973, 1977) has had the result that the examination of managers' planning and strategizing has largely disappeared from the research agenda (Jarzabkowski, 2005; Jarzabkowski & Balogun, 2009). Thus, on one hand, the question raised by SAP scholars has been "Where is the society in these analyses?" and on the other "Where is the managerial practice in these analyses?" (Johnson, Langley, Melin & Whittington, 2007).

Drawing on various onto-epistemological social theories[1], SAP scholars have developed and institutionalized a research agenda that focuses on "what people *do* when they do

[1] Although the basis for strategy as practice lies within the so-called 'practice turn' (Schatzki, Knorr-Cetina & von Savigny, 2001) in social sciences, various scholars have pointed out that the studies conducted under the umbrella of strategy as practice accommodate a heterogeneous mix of rationalist, interpretivist, and post-structuralist contributions (e.g. Carter, Clegg & Kornberger, 2008a; Rasche & Chia, 2009; Ezzamel & Willmott, 2010; Orlikowski, 2010).

strategy" (Johnson, Melin & Whittington, 2003; Jarzabkowski, 2005; Whittington, 2006). This focus on 'doing' implies that the analytical focus of SAP studies is on how strategy is constructed in the everyday activities of individuals in and around organizations. In the early stages, the SAP approach was defined as "an activity-based view" of the micro-activities that constitute strategy (Jarzabkowski, 2003, 2005; Johnson et al., 2003) and later extended with a definition by Whittington (2006), who pointed out that micro-activities needed to be examined in their wider institutional and social context. The framework of "practice," "practitioners," and "praxis" was developed by Jarzabkowski (2005) and Whittington (2006), and this framework emphasized that it is not only the closely observed activity of strategy that is the concern of SAP studies, but also who strategic practitioners are, where they come from and how they are formed, as well as the common practices that become the units of analysis. Another important point is to situate the actors and actions in their context.

Since then, several theoretical and empirical contributions (including practice, institutional, discourse, sense-making, routines, and cognition) have been published under the umbrella of strategy as practice. In the recent Cambridge Handbook of Strategy as Practice, Golhorski, Rouleau, Seidl, and Vaara (2010) point out, however, that there is no single motive behind SAP scholarship – both theoretical and methodological underpinnings also differentiate scholars within this research area. In a way, the Cambridge Handbook of Strategy as Practice has aimed at answering the critique that SAP scholars are accused of, that is, institutionalizing a restricted ambiguous knowledge community, in which the definition of practice is unclear and contradictory, implying "a myriad of things including events, routines, rules, or simply 'being closer to reality' and 'being more practical'" (Carter, Clegg & Kornberger, 2008a). This critique has stormed on one hand from post-structuralist philosophy and critical theory, which, for example, drawing on Foucauldian analysis, deal with "how forms of strategy discourse constitute, discipline and legitimize particular forms of organizational knowledge ('strategy'), executive identity (the 'strategist') and management practice ('strategizing')" (Ezzamel & Willmott, 2010: 102; see also Knights & Morgan, 1991, 1995; Levy, Alvesson & Willmott, 2003; Ezzamel & Willmott, 2008; Allard-Poesi, 2010).

On the other hand, SAP studies are accused of still being dominated by the methodological individualism that those have aimed at resolving. Specifically, what has been pointed out to SAP scholars is that often the focus is still on the actual activities deliberately performed by individuals within structured macro-contexts, rather than attending the "sociological eye" on the unintentional, nonentitative, embodied, "doing and *coping* of being in the world" (Chia & Holt, 2009: 125; see also Carter, Clegg & Kornberger, 2008b).

What has been suggested by the strategy discourse scholars is that, rather than trying to capture the concepts and methods which best explain strategic management, the focus should be on the constitutive effects of the use of strategy as a discourse because "it is through discourse(s) that conceptions and accounts of 'strategy', 'strategizing' and 'strategic management' are articulated" (Ezzamel & Willmott, 2010: 102). In turn, "dwelling worldview" has been built to sensitize strategy scholars to give adequate attention to tacit form of practical knowledge that is grown and regrown through social practice within sociocultural and historical contexts (Chia & Holt, 2009; Chia & Rasche, 2010).

In many ways, these critiques and concerns about the relevance of SAP studies do reflect that important efforts have been made to define and develop the SAP approach. In their response to the critique presented by Clegg, Carter and Kornberger (2008a), Paula Jarzabkowski and Richard Whittington (2008: 104) specifically distance strategy as practice from positivism and explain that "the practice theorists on which strategy as

practice researchers draw are typically concerned not with an objective reality, but with lived experience and the mutual constitution of actors and their worlds." Furthermore, Ann Langley (2010) reflects the potential improvement of the SAP perspective through examining three different orientations to progress and knowledge accumulation – a normal science perspective, a practice theory-based perspective, and a pragmatic perspective – and concludes that although the complexity and interpretive flexibility of practice-based theoretical frames results in a pluralism that may hamper having clarity and unity that would lead individual studies to build strongly on one another, this pluralism has a potential to offer multiple insights into strategizing and strategic issues. At the same time, within this pluralism, she sees a need to deepen and strengthen the strands of work that are being accomplished.

Without downplaying these onto-epistemological tensions between and within different SAP approaches to strategy, this thesis aims to deepen and strengthen a research agenda identified as parallel to or as a part of the SAP stream – strategy discourse studies.

1.3. Strategy discourse studies

As in strategy as practice, strategy discourse studies draw on different analytical routes. These range from critical social analysis to fine-grained analysis of linguistic activities. Knights and Morgan (1991) first analyzed the relationship of discourse and strategy when they introduced Foucauldian analysis to strategy research. They argued that strategy is not merely a rational analysis of market relations, but strategy is a discourse that carries specific conditions of possibility that are rooted in the various exercises of power within the conduct of war and the development of business organizations. In their analysis, Knights and Morgan focus on subjectivity and show that strategy discourse changes managers from passive administrators to self-disciplining subjects who are part of a knowledge community, whose practices are distanced from organizations' everyday functions. By privileging managerial knowledge, the top management is reserved a right to participate in decision-making. The key point that Knights and Morgan emphasize is that strategy can be seen as a mechanism of power that constructs specific kinds of subject positions for individuals in organizations. Knights (1992) further deepens the epistemological understanding of the contribution of Foucauldian concepts to strategy research and stresses that proponents of strategy discourse have been able to make statements claiming the status of truth about organizations, decision making, and the relationship of strategies to specific environments and markets. In addition, Levy, Alvesson and Willmott (2003) stressed that strategy is not a politically neutral tool but "a powerful rhetorical device that frames issues in particular ways and augments instrumental reason; it operates to bestow expertise and rewards upon those who are 'strategists'; and its military connotations reinforce a patriarchal orientation to the organization of work" (p. 97).

In a similar critical vein, Mahmoud Ezzamel and Hugh Willmott (2004, 2008, 2010) have contributed to strategy discourse studies by examining both theoretically and empirically the relationship between strategy and discourse. Their empirical analyses have concentrated on an extensive case study of StichCo, a manufacturing and retailing company, and show that language is never innocent in how it identifies and scrutinizes organizing practices. Their analyses stress that the focus of Foucauldian analysis is on *what discourse does* and thus on the various struggles that arise from the power-knowledge relationship embedded in discourse. Ezzamel and Willmott (2008) emphasize that, although strategy discourse privileges the position of a CEO in organizational decision making, the power is never totalizing – all kinds of resistance and opposition toward decisions can emerge both from the shop floor and from senior staff. In addition, Laine and Vaara (2007) have demonstrated how the mobilization of

strategy discourse involved organizational struggles. In their analysis of a strategic change in an engineering company, top management launched a new strategy discourse to gain control, but this triggered discursive and other forms of resistance on the part of middle management. The middle managers created their own strategy discourses, which then triggered room for maneuver and cynicism on the part of employees.

Others have also critically reflected the relationship between strategy and discourse. For example, Barry and Elmes (1997) examined strategy discourse as a narrative and pointed out that strategic success is closely linked to narrativity and that narrative theory can offer insights about the sociocultural contexts from which these compelling narrative strategies arise. Furthermore, they suggested that in the analysis of the power and politics of strategy, rhetorical analysis could be helpful in studying how strategists develop compelling stories that readers can willingly buy into and implement. In fact, Jarzabkowski's and Sillince's (2007) empirical analysis examined managers' rhetorical resources and focused on the rhetorical practices by which top managers influence commitment to multiple strategic goals. They concluded that it is the interplay of the historical context, consistence of rhetoric with this specific context, and whether organizational members already value some of these goals, which determines whether commitment is strengthened through rhetoric.

Samra-Fredericks (2003, 2004) has also examined the rhetorical resources of the strategist and illustrated how through mundane speech acts, particular ideas are promoted and others downplayed in everyday meeting practices of strategists. She has emphasized that the power of strategy discourse has to be examined in its empirical context to gain fuller understanding of how the power effects of strategy discourse are talked into being (Ibid. 2005). Her articles explicate an ethnomethodological route for a fine-grained analysis of the linguistic resources of strategists and the forms of knowledge used by them in strategizing.

Drawing on critical discursive analysis, Mantere's and Vaara's (2008) extensive empirical study showed how discursive practices have both enabling and impeding implications and effects on the issue of participation in strategy work. They stressed that while the discourses of mystification, disciplining and technologization promote non-participatory strategy practices, discourses of self-actualization, dialogization and concretization promote participation. Kornberger and Clegg (2011) report another extensive critical empirical study. They examine strategy discourse in the context of city management in Sydney and conclude that the power of strategy discourse is three-fold: "first, strategizing is performative, constituting its subjects and shaping its objects; second, strategizing has to be understood as an aesthetic performance whose power resides in the simultaneous and iconic representation of facts (e.g. numbers) and values (big picture); and, third, that strategy is a sociopolitical practice that aims at mobilizing people, marshaling their will and legitimizing decisions" (p. 156; cf. Oakes, Townley & Cooper, 1998).

In recent years, a growing interest has emerged not only toward the power effects and outcomes of strategy discourse, but also toward the concrete means and sources by which power is exercised. Such concrete means include strategy texts and tools that have been shown to play an important role in the mobilization of strategy discourse. For example, focusing on strategy tools, Whittle and Mueller (2010) examined various heterogeneous ways how management accounting systems (MAS) acted as an obligatory point of passage into the strategic agenda of a UK telecommunications firm. They found that, far from being a neutral tool for measuring the strategic value of innovative ideas, accounting systems are used, appealed to and even ignored in deciding what becomes taken of "strategic". Kaplan (2011) reported similar findings in a study where she examined PowerPoint as a device that both enabled and constrained negotiation and participation in strategy making, certifying some ideas and excluding

others through discursive practices of collaboration (negotiation of meanings) and cartography (adjudication of interests). Furthermore, Spee and Jarzabkowski (2009) suggested that by using the concept and framework of 'boundary objects' (e.g. Star & Griesemer, 1989; Wenger, 1998), it is possible to gain novel insights into how strategy tools enable or constrain interaction across intra-organizational boundaries.

Referring to the power of strategic plans, Hodge and Coronado (2006) analyzed the Mexican government's Plan-Puebla-Panama (a policy document dealing with the southeast region of Mexico) and showed that the form and vocabulary of the document reproduced corporate rhetoric and thus had a fundamental impact on the discursive and ideological struggles. They discuss problems that arise in applying managerial discourses in nation states, and vice versa, creating a heterogeneous mix of corponoids (nations acting like corporations) and nationoids (corporations acting like nations). Stressing the relevance of written text, Spee and Jarzabkowski (2011) drew from a theoretical idea of the recursive relation between talk and text and showed how a strategy document became fixated over time to the extend that it was hard for individuals to construct changes in the next strategy cycle because of the consensus embedded in the previous text. In addition, Denis et al. (2011) discussed about strategic ambiguity that was reified in to a strategic plan and resulted escalating indecision in the merger process of three public hospitals. These studies have shown that texts are powerful means that are not only used by individuals in strategy processes but also influencing individuals' action.

I argue that the analyses of strategy discourse studies have the potential to add to previous strategy research in various ways. First, discursive studies drawing on, for example, Foucauldian analysis offer insights about our present social and political condition – about the relationship between power and knowledge (e.g. Allard-Poesi, 2010). Also those studies drawing on Critical Discourse Analysis (Fairclough, 1992, 2003) explicitly reveal how language works on three interrelated levels – text, discourse and social – and stress that ideologies are representations which can be shown to contribute to social relations of power and domination (Phillips, Sewell & Jaynes, 2008; Vaara et al., 2010; Kornberger & Clegg, 2011). And although often considered as "micro," ethno-methodological contributions to strategy discourse studies participate in the analysis of society, politics and culture by meticulously examining social arrangements and the management of official imprints of "reality" (Samra-Fredericks & Bargiela-Chiappini, 2008). In that sense, I have always wondered why the word "micro" is used in relation to ethno-methodology. The point is, however, that these theoretical takes on language and interaction can inform us about how such issues, which often are considered as conditioned by "structure" or "institution," are on one hand constituted and reproduced in and through discourse and communication and on the other, used as "vehicles fabricated from depictive materials at hand" (Goffman, 1983: 11).

Second, strategy discourse studies offer insights about the foundations of strategizing. Those questions about process, practice, politics, identity and power that have intrigued strategy process and SAP scholars are at the core of discursive and communicative theorizing. Whether conceptualizing process in terms of movement, activity, events, change or temporal evolution, discourse analysis can offer insights about how strategy process(es) emerge through language and rhetoric (Langley, 2007: 276, see also Oakes, Townley & Cooper, 1998 and Samra-Fredericks, 2003). A very good example of how "practice" can be examined through discursive thinking is a study by Mantere and Vaara (2008) in which they examined how discursive practices may impede or promote participation in strategy work. Discursive analyses have also demonstrated how actors in strategy communication and strategy texts are not neutral decision-makers and choice carriers, but political and ideological struggles are at the core of strategy (Hodge & Coronado, 2006; Kornberger & Clegg, 2011). Discourse and

communication scholars have also raised questions about who are the strategists and how their "subjectivity," that is, the interrelationship between identity and discourse, forms in and through discourse (Knights & Morgan, 1991; Samra-Fredericks, 2003; Laine & Vaara, 2007). Besides that, all of these studies can be considered as participating in the discussion on power and strategy; the Foucauldian analyses focus on strategy, discourse and power in very explicit terms (Ezzamel & Willmott, 2004, 2008, 2010).

Third, discursive and communicative thinking enables better understanding of empirical phenomena because the point of discourse analysis is to theorize *with* the empirical data. This means that empirical details are analyzed and presented in research reports as they occur, but the contribution of the study is done through rewriting the phenomenon through reflexive theoretical thinking. One could ask how much this reflexive theoretical thinking differs from any other scientific writing. But my point is to stress epistemic reflexivity, which "(1) reveals the researcher's hand in the construction of findings; (2) means that we can also judge the basis for claims-making; (3) provides a means by which an epistemic community can contextualize its intellectual practices and for 'the beginning student' to learn about the 'actual ways of working' (C. Wright Mills, 1959, p. 215); (4) accounts for, and makes visible the political–ethical facets of the academic labour process and (5) and [...] begins to trace or demystify a possible source for that human 'sparking' which lies behind what we gloss as abduction or creativity" (Samra-Fredericks, 2010b: 435-436).

Although epistemic reflexivity is not merely reserved to strategy discourse studies, I argue that discourse analysis enables not only to practice this reflexivity in relation to data but also in relation to oneself. The interesting question of "whether managers do what they want, or they are, and want, what they do" (Allard-Poesi, 2010: 180) that inspires the scholars of strategy discourse and power can also be framed as "whether researchers do what they want, or they are, and want, what they do." In the following I aim to make public the research process through which I have produced the findings of this thesis as well as the basis for the knowledge that I claim to strengthen.

1.4. Methodology

1.4.1. Discursive and communicative perspective

The title of the thesis implies that I take seriously the constitutive role of language in the social practice of strategizing. This means that I agree with those whose specific concern is the analysis of organizational discourse or what has lately been identified as the CCO approach – communicative constitution of organizing (Cooren, Kuhn, Cornelissen & Clark, 2011, citing Putnam & Nicotera, 2009, see also Ashcraft, Kuhn & Cooren, 2009). This follows from certain ontological assumptions about the nature of social practice, that is, that social phenomena are socially constituted in discourse and communication[2]. Thus, the focus of the discursive and communicative research is on interactional events that constitute the building blocks of strategizing. This means examining people interacting with each other in meetings, activities, and informal

[2] I use here both concepts, discourse and communication, because as very thoughtfully pointed out by Karen Ashcraft, Timothy Kuhn and François Cooren (2009), while discourse is more commonly used by organizational and business discourse scholars in Europe, Australia, Canada, and New Zealand, more common in North America is the concept of *organizational communication* in the field of management and organization studies. Both approach social practice, and specifically discourse and communication, as "a field that offers a unique take on organizational life, one worth engaging more systematically" (ibid., 7).

conversations, and any turn of talk, discourse, text, gesture, or narrative can be considered as an event in an ongoing stream of situated action. Furthermore, as pointed out by Cooren et al. (2011: 1151. Emphasis in original), "if organizations are indeed *communicatively* constituted, it means that one should examine what happens *in* and *through* communication to constitute, (re-)produce, or alter organizational forms and practices, whether these are policies, strategies, operations, values, (formal or informal) relations, or structures." In this thesis, I will specifically focus on interaction and texts and their power effects to add to our understanding of how power is exercised through these concrete means.

Interaction and communication take on all kinds of forms. Although the major focus of this thesis is on strategy documents and conversations in meetings, I do not mean to downplay the fact that knowledge, values, ideologies, hierarchies, power relations and so forth can be also diffused, imprinted, and constituted through how people dress, gesture and behave, or through architectural elements, interior design, and technological devices. All of these can work as elements in interactional events: "communication is how a *plenum* of agencies meet; in other words, organizational order 'materializes' at the dynamic junction of objects, bodies, physical and spatial configurations, economic and institutional imperatives, and Discourses" (Ashcraft et al., 2009: 35. Emphasis in original).

Furthermore, interaction is situational. This means that both "tracing the discursive power of socio-material surround and the understanding the production of meaning as a provisional and temporally-situated accomplishment become key to communicative thinking" (Cooren et al. 2011: 1152). To confuse a situational social encounter as an expression *of* structural arrangements is to confuse the situational with the solely situated. This means that the communication encounters are not merely reproducing the social structure, but these attributes are weighted in face-to-face contacts. As Goffman (1983: 8) explains, what is situational about social encounters is "the evidence they so fully provide of a participant's real or apparent attributes while at the same time allowing life chances to be determined through an inaccessible weighting of this complex of evidence. Although this arrangement ordinarily allows for the surreptitious consolidation of structural lines, the same arrangement can also serve to loosen them."

I hold also that "who or what is acting always is an open question" (Cooren et al. 2011: 1152). Individuals can act as animators of texts, principals, discourses, ideologies to name a few. The task for discourse analyst is to trace who or *what* is actually acting. As Latour (1992: 227) reminds us "what our ancestors, the founders of sociology, did a century ago to house human masses in the fabric of social theory, we should do now to find a place in a new social theory for the non-human masses that beg us for understanding." This theoretical lead allows me to analyze texts as performative tangible objects. Texts *do* things: "they communicate socially negotiated meanings, legitimate ways of thinking and action and de-legitimate others, produce consent but may also trigger resistance, and have all kinds of political and ideological effects, some more apparent than others" (Vaara et al., 2010).

It is also important to remember not to jump too quickly to conclusions about individuals' interests and motivations based on what they write down on the questionnaire sheet or say in an interview. Moreover, neither agreement with a statement on the interview sheet nor consensus with an interviewer tells us about a social and psychological contract. As pointed out by Goffman (1983: 5), "effective cooperation in maintaining expectations implies neither belief in the legitimacy or justice of abiding by a convention contract in general (whatever it happens to be), *nor* personal belief in the ultimate value of the particular norms that are involved. Individuals go along with current interaction arrangements for a wide variety of reasons, and one cannot read for their apparent tacit support of an arrangement that

they would, for example, resent or resist its change. Very often behind community and consensus are mixed motive games." Thus, many of the discourse and communication analysts refuse to write about the dispositional tendencies of actors when studying interaction. Although sometimes, when observing people's behavior over a long period of time, it is possible to find tracks of possible dispositions behind their communication, I find that if there is the possibility to state something about exogenous issues, it is more thoughtful to keep the interest in broader patterns of interaction and go beyond conversations and text based on these than to make dispositional attributions (Fairhurst, 2007: 66-68).

These principles have directed my research. However, I have to stress that each of the essays of this thesis are representations of the development of my academic understanding as well as cultural products of the academic literary genre (Czarniawska, 1999). I mean that writing an article is a skilled profession in "a bazaar of meanings" (ibid.: 112). So the products of this thesis are not monolingual but attempt to make sense of the polyphonic and polysemic world[3] of strategizing. Thus, the methodology of this thesis is not drawing on one discursive theory but on whole spectrum of communicative thinking.

Furthermore, there has been a call for an integration of methodologies of discourse analysis (Alvesson & Kärreman, 2000; Vaara, 2010). Because this thesis is based on six different essays, I have had an opportunity to try out different lenses of discursive and communicative thinking, Critical Discourse Analysis, New Rhetoric, and Conversation Analysis. But what is common for all of the analyses in this thesis can be best captured by David Silverman's Effective Qualitative Research approach (Silverman, 2000, 2005, 2007). The basic point made by Silverman is that when studying how phenomena are "constituted" in people's everyday activities, the point is to make use of what qualitative research can offer (getting at "black boxes"; accessing members' activities and categories in situ; locating instances in sequences) and to avoid the orthodoxies about the generalizability and credibility of research. For example, often, qualitative research based on a single case study faces the assumption that general, theoretical (context-independent) knowledge is more valuable than concrete, practical (context-dependent) knowledge. However, often the particular and the local are crucial in understanding what is going on in the members' world, as well as refuting initial hypotheses held by science, as Popper's black swan example illustrates (Flyvbjerg, 2004). Furthermore, the beauty of qualitative research is that it allows the questioning of apparently "objective" concepts and "facts". This, however, requires that the research process is purposive, meaning that the case studied illustrates a process relevant for the research problem, as well as that the case study is theoretically grounded.

1.4.2. Data

Because the point in this thesis is to examine discourse and communication as in situ action, this thesis is based on ethnographic data. Most of the data for this thesis were gathered in a longitudinal case study of strategic planning in a Nordic city organization, and for one of the articles there was additional data gathered from a Nordic church organization. Besides the fact that these organizations are both interesting because of their pluralistic orientation (Denis, Langley & Rouleau, 2007), both of these organizations were actively developing their strategic management, which enabled a focus on explicit actions related to strategy. Furthermore, longitudinal case studies are an important means to examine the dynamic and ambiguous nature of strategy work

[3] Polyphonic=many voices displayed simultaneously, polysemic=many meanings coexisting for a single word.

(Langley, 2007) and there has been a call to study the social and discursive interactions involved in strategizing through this type of data (Rasche & Chia, 2009).

I have been very privileged in that I have been granted access to basically every situation and all documents where strategizing has been taking place in the examined city organization. This case study was initiated by my supervisor, and now both my friend and colleague, Eero Vaara, who had met a consultant who was developing a strategy tool for this City organization. This consultant is my father-in-law and he knew my interest in studying strategic management because I was at that time writing a strategy for a university consortium but looking for an opportunity to opt out from that career. Together they suggested that we would launch an ethnographic research project in the city organization, and after the mayor and key politicians granted us access, I began to interview key individuals involved in the strategy work of this city organization and to observe their discussions. Since then, this research project has grown and two other PhD students, Kari Jalonen and Piia Mikkola, have also done fieldwork for this joint project.

The analyses of the time between 1990 and 2005 are based on retrospective analysis, but strategic work between 2006 and 2011 has been followed in real time. My empirical material comprises observations of strategy meetings and informal conversations, semi-structured interviews, and all kinds of documents and other data such as e-mails and personal diaries (Table 1).

Table 1 Empirical material for the thesis

Data							
Year	1993-2005	2006	2007	2008	2009	2010-2011	TOTAL
Interviews		7	29	30	5	24	91
Meetings (more detailed information on the meeting sites below)							157
- to negotiate access		2	4			2	8
- Top Management Team		1	12		13	6	32
- The City Board			2	1	1		4
- The City Council			16		16		32
- Management Team of the Department of Social and Health Care			7	1	3	1	12
- Management Team of the Department of Technical and Environmental Affairs			4			1	5
- Management Team of the Department of Education and Culture			6	3		2	11
- Heads of Elected Political Parties			2				2
- Strategy team			2	1	4	1	8
- Meetings of political parties			1			1	2
- Work shadowing/internal meetings			4	1		17	22
- Consultancy workshops			2	2		2	6
- Performance Appraisal Interviews						13	13
Documents	x	x	x	x	x	x	x
Power Point Slides or other presentations	x	x	x	x	x	x	x
E-mails			x	x	x	x	x
Diaries/Personal documentations	x		x				x

Altogether we have observed 157 meetings dealing with strategy, in practice covering most of the key meetings of strategic planning between 2006 and 2011. We focused on the city's executive group, the city board, the city council, and the executive groups of each department. In addition, we attended different seminars in and around the organization where strategy was the topic of the discussions. These included away-day strategy seminars, seminars of the executive group and different departments, and the seminars of various subject committees. Apart from a few exceptions, all these discussions were recorded and transcribed. We also shadowed the teamwork and video-recorded performance appraisal interviews of those managers and employees who were implementing strategy. Performance appraisals were recorded also in a Nordic church organization to compare the findings with other context. Furthermore, we participated in quite a few ad hoc working groups as well as in other informal dinners, lunches, and coffee table conversations.

We conducted 91 interviews. In practice, these interviews covered all the central decision-makers. We interviewed 35 individuals, of whom 29 were interviewed twice and 17 three times. The interviews lasted from 45 minutes to 2 hours and were all recorded. We followed a 'story telling' approach with the use of a semi-structured interview guide. These interviews were crucial to be able to understand the context and subtext of the actual strategy process, but also to comprehend how the participants had experienced specific events in strategy work. With only a few exceptions, all these interviews were recorded and transcribed.

We also gathered a great number of strategic plans and their drafts, memos, presentations, implementation reports, media texts, evaluation reports and so forth. We were also fortunate to get access to the emails of a few key people and to be handed a few personal diaries (Balogun & Johnson, 2004). These data provided interesting additional material illuminating people's genuine personal experiences at various stages of the strategic planning process.

I have gathered most of these data and I call this fieldwork ethnographic because there have been times that I have become almost "native" in the City organization. In fact, after I returned to the field after my exchange scholar year in EM Lyon in 2009, one of the City politicians said that she didn't even notice extra involvement in the strategy seminars. She had become so used to me being there that she hadn't realized that it is not obvious that they are observed. Obviously at that time I was impressed by this fact that I am considered almost as a participant although I am an observer. However, I have realized that this access also brings with it a great responsibility to protect the names of individuals whose communication I am representing in my analyses. That is why the organizations are anonymized in those articles in which the site of communication and institutional roles of the participants are acknowledged. What has to be kept in mind, however, is that every analysis is an editorial work and that these analyses have been done with the reader in mind. Some of the texts that I have written with my co-authors are meant to interrogate, some texts are meant to interrupt. But the point is that I am not claiming that the representations in my analyses are "authentic voices from the field" (Czarniawska, 1999: 106-107) or "cases being representative of something larger" (Law & Mol, 2006: 15).

I have tried to write all phenomena examined in my analyses as "cases" in their own right:

> "...each differing slightly in some (unexpected) way from all the others. Thus a case may still be illustrative beyond its specific site and situation, and this tends to be why it is studied, but the lesson it holds always come with the condition that, elsewhere, in other cases, what is similar and different is not to be taken for granted. It remains to be seen, to be experienced, to be investigated. Because they are not, so to speak, representative of something larger (a 'theory'), cases are able to do all kinds of other work. For instance, they may sensitize the reader to events and situations elsewhere that have not been recognized so far and that may well be improbable. They may seduce the reader into continuing to read and tackling other specificities, not because they are 'generally applicable' but because they may be transferable, translatable. They may condense – anthropologist may say 'symbolize' – a range of experiences, relations of a variety of different kinds. They may act as an irritant, destabilizing expectations. For instance, they may destabilize scale relations – undermining precisely the idea that details (or better, specificities) are part of a larger whole. Or they may work allegorically, which means that they may tell not just about what they are manifestly telling but also about something else, something that may be hard to tell directly." (Law & Mol, 2006: 15)

This rather long citation from John Law and Annamarie Mol sums up why I see individual case studies as important research data. Not to be able to generalize but to particularize, to analyze the details carefully with theoretical insights in mind.

1.4.3. Analysis

For each individual study, I have chosen an analytical set of tools that best capture the issues examined. All of these tools draw on different methodologies of discourse and communication; most notably, on Critical Discourse Analysis (CDA, Norman Fairclough, 1992, 2003), New Rhetoric (Perelman & Olbrechts-Tyteca, 1969 [1959]; Perelman, 1982 [1977]), and Conversation Analysis (Sacks, Schegloff & Jefferson, 1974; Heritage, 1984: 233-292).

1.4.3.1. Critical Discourse Analysis (CDA)

CDA is a specific discourse analytic methodology that examines the role played by language in the construction of power relationships and the reproduction of domination. Therefore, it is a particularly suitable approach for my purposes to analyze the power effects of interaction and texts. My analyses draw particularly on the work of the linguist Norman Fairclough (1992, 2003), who has argued that CDA offers systematic tools to examine especially organizational change (2005).

CDA focuses on the systematic account of the complex arrangements and elements of text and talk as they are actually accomplished (produced, interpreted, used) in their social contexts. Thus, CDA necessitates a close and detailed analysis of language (Chouliaraki & Fairclough, 1999; Fairclough, 2003). This means that any interpretation of discourse should be based on the text's lexical and grammatical choices, which are placed and considered in the pragmatic context of the text. According to Fairclough (2003) CDA is a "transdisciplinary" approach because it draws on for instance sociological theories in developing a fuller understanding of text analysis. The crucial point is that the real understanding of the social, societal, political and economic effects of discourse necessitates examining closely at what happens when people talk and write.

In CDA, discourses are not seen as neutral in terms of their political or ideological content (Fairclough, 1989; van Dijk, 1998). This means that different discourses are different ways of representing aspects of the world and that discourses not only represent the world but also signifies it by constituting it with meaning. In fact, discourses are capable of circulating and "hegemonizing" particular ideologies and common-sense thinking (van Dijk, 1998). Methodologically, this means that discourses are connected to ideologies through the assumptions embedded in the texts. These assumptions are usually seen as "triggered" by the linguistic features of text (Fairclough, 2003: 56) and this is why close textual analysis is required in CDA.

Although textual analysis is crucial, Fairclough (2003) argues that discourses should be simultaneously analyzed at three levels: textual (micro-level textual elements), discursive practices (the production and interpretation of texts) and social practice (the situational and institutional context). The first textual level implies close analysis of linguistic structures. The second level of discursive practices brings the community and its behavior into play; analysis of discourse in this respect is analysis of what people do with texts. Furthermore, at the third level, one then focuses on the broader context: how texts and discourses are used in situational and institutional contexts that they both index and construct.

1.4.3.2. New Rhetoric

Rhetorical analysis examines means of persuasion in the field of definition of concepts. The theory of argumentation known as New Rhetoric (Perelman & Olbrechts-Tyteca,

1969 [1959]; Perelman, 1982 [1977]) seeks to avoid "the conclusion that reason is entirely incompetent in those areas that elude calculation and that, where neither experiment nor logical deduction is in a position to furnish the solution of a problem, we can but abandon ourselves to irrational forces, instincts, suggestions, or even violence" (ibid. 1969: 3). In simple terms, Perelman expressed the point of rhetorical analysis, that it makes possible the reasoning about values (Perelman, 1982). New Rhetoric offers an analytical lens to study the argumentation about aesthetics, values, and other areas of human experience that cannot be reduced to the evaluation of formal propositions or to their expression in symbolic logic. This premise has led researchers to focus on argumentation's intersubjective realm instead of just purely focusing on an objective realm of facts and propositions.

While CDA focuses on language in its socio-cultural context and the ideological implications constituted and reproduced through interaction and texts, rhetorical analysis restricts its focus to political and interest-driven interaction and seeks to find patterns of goals, interests and shared assumptions underlying persuasive actions. Various scholars in the field of organization studies have used rhetorical analysis to analyze how people seek to persuade and convince each other in organizations (e.g. McCloskey, 1985, 1994; Sillince, 2000; Green, 2004; Suddaby & Greenwood, 2005; Leonardi, 2008; Green, Li & Nohria, 2009). In the field of strategy research, for example, Jarzabkowski and Sillince (2007) examined how top managers influence employee commitment through analyzing their rhetorical practices. I make use of the rhetorical analysis in this thesis by analyzing the key techniques through which participants seek justification for their claims in the formulation of strategy.

1.4.3.3. Conversation Analysis

Conversation analysis examines discourse and communication as "lived experience" (Samra-Fredericks, 2003) or as "participants' action" (Llewellyn & Spence, 2009) where the phenomenon arises from laminated interaction processes (Boden, 1994). The *practice,* which is the interest of the strategy as practice community, is examined as something that is available to those that participate in interaction. The details of social life - the actual methods that the participants use in producing, recognizing and responding to particular actions - are seen as informing us of the arrangements through which people produce their activities and make sense of their worlds. The primary objects of study are the structures and practices of human social interaction *per se* – not interaction as a carrier of other social phenomena (see Heritage, 1995; Zimmerman & Boden, 1991; Schegloff, 1992).

In very simple terms, the focus in this type of analysis is not on the demographic factors that would explain the actions of individuals, but on the factors that actors make relevant in their interaction. I don't mean that issues such as career experience, education, socio-economic background, age, gender, income, and so forth are not important in explaining action, but in conversation analytical studies these factors become relevant only if they are meaningful to people in the situation. This meaningfulness is examined through the organized details of interaction that participants in strategy conversations use to display their understanding of 'the state of the talk' for one another, meaning that they "'make reasonable' their behavior to one another in their occasioned methodical selections of linguistic resources" (Fairhurst, 2007: 57; see also Llwellyn & Spence, 2009).

In fact, ethnomethodology-grounded analysis involves a specific type of approach to data. Through a detailed analysis of *in-situ* recorded interaction, the researcher is able to examine how apparently unremarkable aspects of our daily working lives turn out to be critical in understanding how people accomplish, experience and constitute work

and organization (Llwellyn & Hindmarsch, 2010). From an ethnomethodology-informed research position, it is impossible to know beforehand what the data enables the researcher to express (Samra-Fredericks & Bargiela-Chiappini, 2008). In very concrete terms, this means in an ethnomethodology-informed analysis locating single utterances within a sequence of talk to be able to see the process through which they take on meaning. Thus, it is important to record all the situations where the social interaction under examination takes place, which also ensures the reliability of the replication of what has been said.

1.4.4. Reflection

Discursive and communicative analyses involve methodological challenges. Discourse and communication are ontologically and epistemologically complicated objects to study and capture. In particular, it is challenging to place specific linguistic findings in a broader context and to identify when, for example, rhetoric has broader implications. Discourse analysis is also necessarily interpretative and subjective, which can lead to one-sided representations and conclusions. However, I have often compared the evidence from several sources to deal with these challenges. I also stress that co-authoring the essays of this thesis with scholars who have different academic backgrounds have strengthened the analyses because we have had to adjust our interpretations to find a solid and agreed result. I also had several opportunities to discuss our findings with representatives of the organizations. In fact, their comments helped to improve the quality of the analyses and added new insights to these.

It should be noted that all these analyses were challenging language-wise. The actual analyses were conducted in Finnish, but the main results were translated into English. One particular concept has tested the limits of translation, the concept of "omavastuu." The solution to this translation can be found in the chapter 2. Although meanings and nuances were unavoidably lost in such translations, I have tried to translate the data in a way that the spirit of the original language usage has been kept. Also the richness of the material has allowed me to deal with specific problems enabling constant comparison of several different data sources.

Further, different methodological approaches to discourse and communication analysis are not necessarily well fitted together. CDA offers an epistemological lead to go beyond a particular interaction and texts in a sense that it considers both interaction and texts being embedded in social, societal, political and economic assumptions. Rhetorical analysis is not that much in contradiction with CDA, but both of these perspectives do something that (most) conversation analysts wouldn't do – they go beyond what is readily observable. For conversation analysts, what the actions of individuals come to be taken as a "reflection" of is necessarily an open question.

However, beyond these tensions, I see that all of these analytical perspectives offer:

"…the bent to sustain in regard to all elements of social life a spirit of unfettered, unsponsored inquiry, and the wisdom not to look elsewhere but ourselves and our discipline for this mandate. … If one must have warrant addressed to social needs, let it be for unsponsored analyses of the social arrangements enjoyed by those with institutional authority – priests, psychiatrists, school teachers, police, generals, government leaders, parents, males, whites, nationals, media operators, and all the other well-placed persons who are in a position to give official imprint to versions of reality." (Goffman, 1983: 17)

I add to this list written 30 years ago, the strategists.

1.5. Results

1.5.1. On the force potential of strategy texts: A critical discourse analysis of a strategic plan and its power effects in a city organization. Published in Organization, 2010, 17(6): 685-702.

The objective of this paper, co-authored with Eero Vaara and Pekka Pälli, is to examine the characteristic discursive features that explain the power of strategic plans as influential documents. We draw on Critical Discourse Analysis (e.g. Fairclough, 1992, 2003), which is a particularly fruitful methodology for understanding the role of texts in strategy processes and in organizational and social struggles. In this spirit, we emphasize that strategy texts are not mere documents representing specific ideas, but that strategy texts have force potential (Fairclough, 1992) and textual agency (Cooren, 2004). That is, strategy documents serve several purposes: they communicate socially negotiated meanings, legitimate ways of thinking and action and de-legitimate others, produce consent but may also trigger resistance, and have all kinds of political and ideological effects, some more apparent than others. Consistent with the premise of CDA (Wodak, 2004; Fairclough, 2005), we emphasize the importance of systematic micro-level linguistic analysis as a cornerstone of critical analysis. Thus, this analysis adds to previous strategy studies that have not focused on the crucial textual micro-processes and functions (Hodge & Coronado, 2006; Phillips et al., 2008).

For the analysis of power of strategic plans, the municipality sector provides a particularly interesting setting for our analysis. This is because of the politically and ideologically charged nature of planning and reforms in state and municipal organizations – as studies of community politics (Forester, 1989; Rakow, Belter, Drystad, Hallsten, Johnson & Indvik, 2003) and New Public Management (Hood, 1991; Ferlie, Ashburner, Fitzgerald & Pettigrew, 1996) have illustrated. In particular, recent reforms have tended to either replace bureaucratic values and practices with post-bureaucratic ones (Clegg & Courpasson, 2004, du Gay, 2000, 2003) or strengthen the role of managerialism (Rouillard & Giroux, 2005), which has led to the overall promotion of neo-liberal ideology in public service (Fairclough, 1992, 2003). Importantly for our purposes, these changes have often been linked with the introduction of business sector strategic planning practices into public sector decision-making.

In our empirical analysis, we concentrated on the creation of a strategic plan for local government in Lahti, a city in Finland. We focused on the official strategy document of 2005, but the aim was not only to analyze the textual features of this plan, but also to link these characteristics to the production of this plan, as well as its interpretations and use by various actors. For this purpose, we drew on extensive interview, media, and other material in this case. Our inductive analysis allowed us to identify and focus on five characteristic discursive features: self-authorization, special terminology, discursive innovation, forced consensus, and deonticity. We argue that these discursive features are not trivial characteristics but have important implications for the textual agency of strategic plans, their performative effects, and ideological implications. While the specific characteristics and effects are likely to vary depending on the context, we maintain that these features can, with due caution, be generalized and conceived as distinctive features of the strategy genre.

1.5.2. Strategy as text and discursive practice: a genre-based approach to strategizing in city administration. Published in Discourse and Communication, 2009, 3(3): 303-318.

Strategies have come to play a significant role in business as well as in other organizations. It is hard to find a company that would not somehow structure its decision-making or reflect upon its identity with strategy concepts. Furthermore, strategic management has also colonized other organizations to the extent that universities, hospitals, schools, and even kindergartens now systematically produce (talk, write and publish) and consume (read, interpret and recontextualize) strategy texts.

The wide spread of strategy concepts has directed researchers to pay attention to the discursive aspects of strategy (Hendry, 2000; Knights & Morgan, 1991; Vaara, Kleymann & Seristö, 2004). These studies have pointed out that strategy can be seen as a discourse that has its own specific conditions of possibility, and that these conditions enable certain ways of acting and at the same time restrict other actions. At the time of writing this article, there was a lack of systematic analysis of strategy texts, which was unfortunate given their central role in strategizing and organizing in contemporary society. In this article, we attempted, with Pekka Pälli and Eero Vaara, to partially fill this research gap by examining the special characteristics of the genre of strategy.

Our analysis of genre combines an analysis of the textual features of a strategy document with an analysis of the production and reproduction of the document in face-to-face interaction. We argue that the use of particular linguistic forms and structures in a strategy document and in the editing process is not arbitrary, but is in fact motivated by social conventions. In other words, the normative model of the strategy genre provides textual structures and vocabulary for any strategy. Furthermore, the genre may be seen as a socially recognizable practice of strategy work, which means that the production processes of strategies are institutionalized practices characterized by intertextual negotiations and the reworking of text. Therefore, when we speak of a genre of strategy, we refer not only to textual patterns but also to the face-to-face interaction of strategists that is intrinsic to strategizing.

By examining these two interconnected aspects of genre, we show that the genre of strategy is by its very nature definitional. We show that while strategy text and talk aim to define the form and content of strategy, they simultaneously include statements that leave room for different understandings. This ambiguity of meanings is an essential part of strategy work and it is a key part of the intersubjective and intertextual processes of negotiating strategy.

1.5.3. Authoring strategy: rhetorical tactics in strategy formulation

This study, co-authored with Eero Vaara, develops an empirically validated model that elucidates the rhetorical tactics through which strategic plans are crafted, influence is exercised, and authority constructed in strategic planning meetings. In this paper, we report findings from an ethnographic study of strategizing in a Nordic city organization. By drawing on extensive participant observation, interviews, and documentary material, we engaged in an in-depth analysis of the naturally occurring conversations in which strategies were planned. For the purpose of this paper, we focused on 34 recorded top management team meetings where the City administration's key decision-makers worked on the City's strategy. We examined general patterns characterizing the negotiations and then used specific textual examples to illustrate and further elaborate on these patterns.

We focused on the rhetoric through which influence was exercised in strategic meetings. By rhetorical strategies, we mean various linguistically mediated ways through which people seek justification for their claims (Perelman, 1969, 1982; Suddaby & Greenwood, 2005; Jarzabkowski & Sillence, 2007). As a result of our abductive (Wodak, 2004; Van Maanen, Sodersen, & Mitchell, 2007) analysis, we focused on three related issues: positioning, argumentation, and commitment. Positioning was constituted through mobilization of frameworks and definition of concepts. Key tactics of argumentation were instrumental rationalization, moralization, exemplification, and cosmology. The participants also made significant efforts to create and enforce commitment through tactics of consensus and autopoiesis.

Our findings elucidate the social interaction practices through which strategic choices are constituted in top management meetings. It is important to focus attention on these practices to understand better the local practice of top management interaction through which strategic ideas are crystallized. Furthermore, this analysis adds to our understanding of authority in strategizing, which is the ability of organizational actors to have an impact on the strategic decisions in a given social setting. By spelling out a situation-specific view on authority, this study furthers our knowledge of how influence and power in strategy formulation are embedded in the minutiae of meetings, but also shows that this authority is both enabled and constrained by the previous decisions that come to haunt strategists through autocommunication.

1.5.4. Appropriating the words of strategy in performance appraisal interviews

Organizational scholars have lately recognized the importance of studying the role of texts in organizations (Maguire & Hardy, 2009; Phillips, Lawrence & Hardy, 2004). It has been understood that different types of written texts are not only mediators of action and discourse, but also shapers of understandings and behaviors of actors (Phillips et al., 2004). Actors can exercise their agency, for example, by authoring texts to carry out disruptive and defensive institutional work (Maguire & Hardy, 2009). Texts can also play a key role in the accomplishment of authority in organizational interaction (Benoit-Barné & Cooren, 2009). Hence it seems quite evident that people in organizations are acting through textual and physical objects that they produce. But this is not the whole story. Texts and objects, or artifacts in general, are claimed to have agency of their own, and as Cooren (2004, 2010) has argued, humans are acted upon by texts as well.

In the field of strategy research, there is also a growing interest in focusing on the material aspects of strategizing (Denis, Langley & Rouleau, 2007; Heracleous & Jacobs, 2008; Kaplan, 2011). It has been recognized that strategy has performative effects through strategic plans that inscribe power relationships and social order in organizations (Spee & Jarzabkowski, 2011; Kornberger & Clegg, 2011; Vaara et al., 2010) through 'textual agency' (see Cooren, Matte, Taylor & Vasquez, 2007; Cooren, 2008). While the focus of these studies has been on strategic plans and the practices through which these plans are created, the question of how strategic plans are used and understood in the face-to-face interaction of managers is poorly understood. This study therefore aims to extend our understanding of reproduction of strategy by examining the implementation of strategy in performance appraisal interviews (hence PAs).

This study, co-authored with Pekka Pälli and Piia Mikkola, focuses on the recontextualization of strategy in performance appraisal interviews, which we see as an essential but poorly understood site for strategizing. Our interest in PAs springs from both the importance of a better understanding of the communication in these situations and of how this communication is linked to the power of strategy discourse. Through

ethnomethodology-informed dialogical analysis (Bakhtin, 1986; Heath & Luff, 2007; Hutchby & Wooffitt, 1998; Linell, 2009) we examine PAs as spaces for "strategically aligned behavior" (Van Riel, Berens & Dijkstra, 2009). We address the power and dominance of strategy discourse through the concept of "dialogic appropriation" (Bakhtin, 1981; 1986) and the related concept of "ventriloquism" (Ibid., 1981; Cooren, 2010). From this perspective, texts are both material and semiotic "agents" that contribute to the social interaction of strategizing by enabling and constraining how strategies are used and understood. The emphasis that is put on "multi-modal" social interaction (Fairhurst & Grant, 2010, p. 290-292) in this study means that the material and physical aspects of interaction are included in the analysis of discourse to build a better understanding of the power of strategy.

In our empirical analysis we concentrated on two Finnish public organizations, "State Church" and "Bay City" (pseudonyms for a church organization and a city organization), which have developed their strategic management practices over a number of years. These organizations provided a particularly interesting setting for our analysis because in both of them PAs were acknowledged and emphasized as an arena for discussing how each employee's work was related to the organization's strategy. We focused on 13 video-recorded PAs and examined how the participants appropriated and attributed power and agency to strategy in situational discourse. Through the analysis we uncovered distinctive discursive practices through which strategy appropriation unfolds: embodyment of strategy, strategy as text behind the conversation and strategy as text here and now. We argue that through these discursive practices participants constitute strategizing as a social phenomenon that is embodied, intertextual, and material.

1.5.5. Who is the strategist? An analysis of a disagreement in strategy formulation meeting

In strategy research, there is a growing literature on discourse. This stance reveals how strategizing is an activity constituted through discourse (e.g. Knights & Morgan, 1991; Kornberger & Clegg, 2011) and performed in communication (e.g. Samra-Fredericks, 2003; Mantere & Vaara, 2008). Overall, there has been a call for "more work on communicative practice in organizations to examine what it is that actors do as they continuously construct reality" (Thomas, Sargent & Hardy, 2010: 37, citing Jarzabkowski, 2005). In line with this call, the main objective in this study is to extend specifically the literature that examines strategists' linguistic and rhetorical resources to influence the strategic planning processes.

Focusing on strategists' communication in a top management team, this study examines a socially constituted tension between senior managers and shows that 'being a strategist' is a fluctuating role even within a top management team. I draw on literature that focuses on how language is influential in constituting strategists' reality (e.g. Samra-Fredericks, 2003; Rouleau, 2005; Jarzabkowski & Sillince, 2007; Mantere & Vaara, 2008; Jarzabkowski & Balogun, 2009; Rouleau & Balogun, 2011). Although drawing on different discursive theories, a common element of these studies has been the recognition that language (whether in the form of sense-making, communication, discourse, or rhetoric) is influential in the constitution of 'the voice' for leaders and those involved in strategizing. Specifically, these studies have directed attention to the ways in which language is consequential in strategy work. However, we still know little of how communication actually unfolds in strategy work and what issues become important in such communicative situations.

Hence, the findings of this study are based on qualitative data analysis, which focuses on sequences of social interaction (Silverman, 2007: 61-84). The analysis of

interactional sequences implies studying what participants of interaction accomplish, and 'how' this 'what' is accomplished in members' everyday and naturally occurring social situations (Boden, 1994; Samra-Fredericks, 2010). In this spirit, I emphasize that the focus is not on the individual and psychological attributes of participants of strategy formulation, but that these attributes are weighted in face-to-face contacts, which happen in socio-cultural contexts. Furthermore, consistent with the premises of communicative thinking (Cooren, Kuhn, Cornelissen & Clark, 2011), I stress the importance of in situ analysis as a foundation of capturing the actual activities of individuals in organizations.

The motivation for this type of analysis emerged during an ethnography of the strategy formulation meetings of a top management team (TMT), which was updating a strategic plan for a City organization. During these meetings, the key participants of the TMT displayed a tension with each other about how the strategic plan ought to be written. This resulted in face-saving practices as well as an enforced domain of participation obligations. Face-saving practices are, for example, those mitigating or 'sin-paying' practices that resolve the constituted tension. Management of involvement obligations is the constitution of those framings that constitute intersubjectivity among those involved.

Through a detailed analysis of this tension, I am able to support the findings of Samra-Fredericks (2003) on how strategizing is accomplished during *in situ* talk-based interaction. Her study showed how the linguistic skills of one specific manager to constitute strategic weaknesses were influential to the extent that the loss of credibility of another participant resulted in him eventually being fired. In a way, this study examines a very similar situation – someone's face and credibility being threatened – but in this case, the linguistic skills of one of the managers become consequential in the sensitivity to solve tensions, which are linked to participants' professional roles and power relations.

1.5.6. Sociopolitical and textual agency in strategy formation

Strategy, as traditionally considered, is all about agency. The word embeds an implicit assumption of intention, of purposefulness, and of the capacity to freely choose one's orientation. Conventionally, strategy has been seen as a means through which managers can exercise power in organizations through rational planning (Ansoff, 1965), strategic choice (Child, 1972) or the management of resources and capabilities (Foss, 2011). However, rather than being omnipotent actors, managers have to negotiate with and work with others. This involves organizational politics among top managers (Pettigrew, 1973). Middle managers' actions or lack of action also greatly influence the outcomes (Balogun & Johnson, 2004; Wooldridge & Floyd, 1990; Mantere, 2008). Moreover, organizational members and other stakeholders may or may not support the strategic ideas presented (Thomas, Sargent & Hardy, 2010). Previous studies have thus highlighted some of the key issues in terms of understanding managerial agency in strategy formation.

However, less is known about the ways in which this agency is mediated or accomplished in and through communication in organizational strategizing. This is the case even though we know that strategies are formed and implemented only through conversations (Samra-Fredericks, 2003; Spee & Jarzabkowski, 2011) and narratives (Barry & Elmes, 1997; Boje, 2008; Fenton & Langley, 2011), implying that there is no shared strategy without communication. Strategic discourses themselves also have a fundamental impact on who can act as a strategist and on what terms, thus impacting the agency of the various actors involved (Knights & Morgan, 1991; Mantere & Vaara, 2008). Moreover, strategic plans that reify strategic ideas play a crucial role in our

media-rich society in directing the actions of managers and other organizational actors, often leading to unanticipated interpretations and outcomes (Hodge & Coronado, 2006). The issue of agency is thus only partially understood in organizational strategizing. In particular, there is a paucity of knowledge of the ways in which managers' agency is enabled or constrained by discourses that are mobilized and how the work on strategy texts impacts this agency.

Hence, to further our understanding of agency in strategy formation, I examine with Eero Vaara and Ann Langley the ways in which managerial action, discourses and texts together influence strategy formation. In this view, sociopolitical agency is the way in which top managers and other organizational actors impact strategy formulation. Following the idea that discourses play a central role in strategizing (Knights & Morgan, 1991), we also examine the power of discourses to enable or constrain strategy formation. To distinguish the specific effects of texts, we define textual agency as the capacity of texts to become important actors in organizational processes, for example as directive texts or obligatory passage points (Cooren, 2004; Hodge & Coronado, 2006). The key theoretical point is that managerial agency, discursive power and textual agency are interlinked and together constitute strategic agency in and through strategy formation.

In this paper, we draw on a longitudinal study of strategic planning in a Nordic city organization between 1990 and 2011 to illustrate the multiple forms and sources of agency that explain the evolution of the activity of strategic planning and its role in the city's action. In particular, our analysis demonstrates how managers and other actors invest in strategic planning to increase their own agency, but how increasingly elaborate planning practices and the texts themselves also limit the power of managerial and other actors. Our analysis also highlights the dynamics of centering and decentering, i.e. how actors such as top management attempt to seize control of authoring, but how other actors by their participation and interpretations increase polyphony. Furthermore, we demonstrate how in these cycles the clarity of strategies contributes to their performative power, but how various interpretations tend to increase ambiguity over time. Thus, our analysis helps to explain some of the reasons for the unintended, unpredictable and even undesirable outcomes of strategic planning.

1.6. Conclusion

The main argument that I make is that strategy is all about interaction, texts and power effects. In a study that I have written and conducted with Eero Vaara and Pekka Pälli, we combined a detailed textual analysis with the analysis of political and ideological struggles, which characterized the strategy process of 2005 in the City administration of Lahti City organization. Our other study focused on the genre of strategy and pointed out that both strategy texts and conversations are not arbitrary, but in fact motivated by systematic social conventions. Three of the studies presented in this thesis focused explicitly on interaction and on what is constituted in strategy conversations. With Eero Vaara, I focused on rhetorical strategies and how influence was exercised and authority constructed in strategy meetings through these linguistic tools. The study that I wrote with Pekka Pälli and Piia Mikkola focused on performance appraisal interviews and what kind of strategy work people do in these institutional situations. We showed that there are specific discursive practices through which the words of strategy are appropriated. My own essay focused on a disagreement that emerged during a strategy formulation, and I showed that this tension was about the professional identities of those involved. And finally, the study written with Eero Vaara and Ann Langley showed how strategy is, in fact, an interplay and struggle between socio-political and textual agency. All of these studies emphasize the constitutive role of discourse and communication at different sites of social life within the context of strategizing. I hope

that altogether, these studies will sensitize scholars to pay careful attention to language and its role in social practice of strategy.

I argue that in this thesis, I have shown how discursive and communicative thinking can be meaningful in grasping what is going on in social practice of strategy – although not all strategy practice. I have very purposefully limited my attention to discourse analyses when studying strategy interaction, although there are strong bodies of literature focusing on one hand on institutions and on the other on the individual/psychological. This is because I argue that the flourishing literature on discursive approaches holds great promise for strategy research. Although it can be seen merely as a qualitative alternative to more mainstream empiricist approaches, it is much more than that. As demonstrated in the essays of this thesis, discursive and communicative thinking poses different kinds of questions about strategy. These essays also employ theoretical frameworks still rarely used in strategy research, as well as methodologies that depart from surveys and 5 to 7-point scales.

Obviously this kind of research has its limitations. First of all, discursive and communicative thinking offers insights that often make issues more complex rather than offering explanations about "the reality out there". It is fair to say that these explanations are usually best offered by using quantitative methods. Furthermore, the effectiveness of strategy work that might interest practitioners and consultants is mostly a disruptive question in discursive studies. I use the word disruptive because it carries two meanings. First, it can be seen as synonymous to destructive. I mean that the question of how to make something effective can be destructive because if the purpose of discursive and communicative thinking is to address the questions of the "whats" and "hows" of interaction (Silverman, 2000), and thus to identify how strategy is communicatively constituted, the practical relevance of findings is also always a contextual question – effective to whom and in what situation. Second, the question of effectiveness is disruptive also in another way. Examining the effectiveness of discourse analysis for strategy practitioners and consultants can also disrupt in a positive way because it challenges both the researchers and practitioners to examine the results of the analysis in innovative and creative ways. The real strength of qualitative research in general, and discourse analyses in particular, is that through these it is possible to establish the character of the phenomenon in a way that is not available to quantitative research (e.g. the multiple voices used by individuals and their consequences or the appearances of the everyday and how they are made routine). By examining how these are organizationally embedded – studying when and how the actual categories employed by people are used – it is possible to uncover how apparently "obvious" phenomena, such as "strategy," are put together in different settings (Silverman, 2005).

If we come closer to the specific limitations of this thesis, the empirical contexts of this thesis have obvious structural limitations (public organizations, Nordic country, welfare community, cultural specificity, elitist and privileged ethnicity embedded in postcolonial identity, peculiar language etc.), which may be seen to hamper the comparison of these findings to other contexts. But at the same time, the empirical phenomena examined in this thesis (e.g. the introduction of strategic management to a context characterized by democratic decision-making, senior managers negotiating in strategy meetings, written strategy texts having influence on actions, managers and employees discussing in performance appraisal interviews) can be seen as phenomena that also take place in other sites. If it is not yet clear, I tend to be agnostic toward context-independent knowledge anyhow. As I have argued, each phenomenon should always be as empirically traceable and fully visible somehow to make sense to a researcher of social practice.

Furthermore, it can be seen as paradoxical that in this thesis I have also discussed the power that language communities hold, but I am taking part of a language community

that restricts participation through the use of such rhetoric that is unavailable to someone that is not practicing this specific science. I could hide behind the normal science argument - this is how research is normally written in our field – but to be honest, I am concerned about the fact that I am also reproducing a system of action that becomes institutionalized and is recognizable by its repetition. But I guess Barbara Czarniawska's (1999) description of management and organization studies as a bazaar of meanings – a bazaar where potential "buyers" speak more languages and dialects than we as researchers could ever master – promises that although I am participating in the reproduction of a specific genre, we are not "lost in translation". Be it a knowledge bazaar, board room or Facebook wall, and be it information, efficiency and/or intervention that we seek, this requires us as researchers, strategists and socio-political actors to create a space where participants with an interest may participate in debate and dialog. And let us accept the fact that the result will always be an open text because an intractable phenomenon of finalizing a thesis is that you begin to go through all the authors that you've discussed with and listened, and the texts that you've read during the research process. This has resulted not only that I have begun to miss those individuals but also that I have realized number of ways in which this thesis could have been written otherwise or how my findings have raised new questions and opened avenues for future research.

First, we argued with Eero Vaara and Pekka Pälli that the Lahti city's strategy of 2005 implied a shift from a Nordic welfare state model towards a neo-liberal ideology. But to really understand what these ideological shifts result in strategizing processes and how those enter in the daily life of customers, inhabitants, patients and all of those who are the focus of organizational action, we need to investigate what the strategic rationality produced in these processes result. To investigate what strategic plans result in other contexts is an important task for other scholars as well.

Another interesting avenue for research is the ambiguity of strategy text and talk. Since our publication of the definitional nature of strategy genre (Pälli et al, 2009), two investigations of the ambiguity of strategy have been published (Denis et al., 2011; Spee & Jarzabkowski, 2011) that I find particularly interesting. Both of these studies implicate that there are paradoxical results in strategizing: "escalating indecision" (Denis et al., 2011) and "fixated meaning" (Spee & Jarzabkowski, 2011). Furthermore, a very recent publication by Mantere, Schildt and Sillince (2012) discuss about "meaning void" in the context of reversal of strategic change. I see that all of these studies have opened the "black box" of strategizing in a way that offers possible avenues for future research by focusing on ambiguity of meaning and its effects in strategizing processes.

Finally, strategy research needs more analyses of power. I agree with Carter et al. (2008a, 2008b), Vaara (2010), Kornberger and Clegg (2011) and all the others who argue that we need to understand better the power effects of strategy. I have tried to contribute to this research agenda with my beginner analyses. But as Samra-Fredericks (2005) argues, there remains the essential pre-requisite to access practitioners' everyday world of doing and talking to meet the empirical challenge to uncover the members' everyday interactional constitution of these power effects. I see that strategy discourse studies can offer insights of these power effects by focusing on strategists' official imprints of reality.

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2 ON THE FORCE POTENTIAL OF STRATEGY TEXTS: A CRITICAL DISCOURSE ANALYSIS OF A STRATEGIC PLAN AND ITS POWER EFFECTS IN A CITY ORGANIZATION[4]

2.1. Introduction

Researchers have begun to pay attention to the role of discourse in strategy and strategizing (Oakes, Townley & Cooper, 1998; Hardy, Palmer & Phillips, 2000; Samra-Fredericks, 2003; Laine & Vaara, 2007; Ezzamel & Willmott, 2008; Phillips, Sewell & Jaynes, 2008). However, few studies have examined strategy texts and their characteristics (for an exception, see Hodge & Coronado, 2006). In particular, we know little of how power is exercised in and through these texts, which is unfortunate given the central role of strategy documents in contemporary organizations and society at large.

Hence, the objective of this paper is to examine the characteristic discursive features that explain the power of strategic plans as influential documents. We draw from Critical Discourse Analysis (CDA) (Fairclough, 1995; Fairclough & Wodak, 1997; van Dijk, 2001; Fairclough, 2003; Wodak, 2004), which is a particularly fruitful methodology for understanding the role of texts in strategy processes and in organizational and social struggles. In this spirit, we emphasize that strategy texts are not mere documents representing specific ideas, but that strategy texts have force potential (Fairclough, 1992) and textual agency (Cooren, 2004). That is, strategy documents serve several purposes: they communicate socially negotiated meanings, legitimate ways of thinking and action and de-legitimate others, produce consent but may also trigger resistance, and have all kinds of political and ideological effects, some more apparent than others. Consistent with the premise of CDA (Wodak, 2004; Fairclough, 2005), we emphasize the importance of systematic micro-level linguistic analysis as a cornerstone of critical analysis. Thus, this analysis adds to previous strategy studies that have not focused on the crucial textual micro-processes and functions (Hodge & Coronado, 2006; Phillips et al., 2008).

While strategic plans may have powerful effects in all organizations, the public sector provides a particularly interesting setting for our analysis. This is because of the politically and ideologically charged nature of planning and reforms in state and municipal organizations – as studies of community politics (Forester, 1989; Rakow, Belter, Drystad, Hallsten, Johnson & Indvik, 2003) and New Public Management (Hood, 1991; Ferlie, Ashburner, Fitzgerald & Pettigrew, 1996) have illustrated. In particular, recent reforms have tended to either replace bureaucratic values and practices with post-bureaucratic ones (Clegg & Courpasson, 2004, du Gay, 2000, 2003) or strengthen the role of managerialism (Rouillard & Giroux, 2005), which has led to the overall promotion of neo-liberal ideology in public service (Fairclough, 1995, 2003). Importantly for our purposes, these changes have often been linked with the introduction of business sector strategic planning practices into public sector decision-making.

In our empirical analysis, we concentrated on the creation of a strategic plan for local government in Lahti, a city in Finland. We focused on the official strategy document of 2005, but the aim was not only to analyze the textual features of this plan but also to link these characteristics to the production of this plan, as well as its interpretations

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and use by various actors. For this purpose, we drew from extensive interview, media, and other material in this case. Our inductive analysis allowed us to identify and focus on five characteristic discursive features: self-authorization, special terminology, discursive innovation, forced consensus, and deonticity. We argue that these discursive features are not trivial characteristics but have important implications for the textual agency of strategic plans, their performative effects, and ideological implications. While the specific characteristics and effects are likely to vary depending on the context, we maintain that these features can with due caution be generalized and conceived as distinctive features of the strategy genre.

2.2. Discursive perspectives on strategy

The discursive aspects of strategy and strategizing have been studied from multiple perspectives. Drawing on critical social analysis, strategy has been conceptualized as an ideologically-laden body of knowledge (Knights and Morgan, 1991; Levy, Alvesson & Willmott, 2003; Lilley, 2001; Grandy & Mills, Seidl, 2007). In their influential paper, Knights and Morgan (1991) looked at strategy discourse from a genealogical perspective. They traced the roots of strategy discourse in post-war American capitalism and emphasized that its advance was not a 'necessity', but the result of a number of specific developments. In a similar spirit, Levy, Alvesson and Willmott (2003) proposed a perspective inspired by Critical Theory for further exploration and analysis of the hegemonic nature of strategy discourse and the associated practices. Grandy and Mills (2004) drew on Baudrillard's ideas about simulation and simulacra and analyzed the naturalization of this discourse and its effects on practice. According to this view, the strategy discipline and its various models and practices have started to live a life of their own that is disconnected from the (other) reality. Examples of this include 'mission statements,' which are believed to be important means for improving organizational performance even though the linkage is vague, to say the least. In a similar vein, by drawing on Wittgenstein, Lyotard and Luhmann, Seidl (2007) suggested that strategy should not be conceptualized as a unified body but rather as fragmented into a multitude of autonomous discourses.

Other research has focused on discursive practices in strategizing (Hardy et al., 2000; Vaara et al., 2004; Mantere & Vaara, 2008). For instance, Hardy et al. (2000) examined a Palestinian NGO organization, where a specific kind of strategic discourse 'took' and legitimated organizational changes. They argued that such process involves as circuits of activity, performativity and connectivity. Vaara, Kleymann and Seristö (2004) studied the discursive practices through which specific strategies such as 'airline alliances' are legitimated and naturalized. In another analysis, Mantere and Vaara (2008) then examined how specific discursive practices – mystification, disciplining, technologization, self-actualization, dialogization, and concretization – may impede or promote participation in strategy. Ezzamel and Willmott (2008) in turn analyzed how strategic activity was articulated, mobilized, and interpreted, and how in particular accounting practices became inbued with strategic significance with implications on what was seen as strategic and what not. Still others have examined the micro-level conversations and rhetoric that constitute everyday strategizing. In particular, Samra-Fredericks (2003, 2004, 2005) adapted a conversation analysis perspective and explicated a number of analytical routes for fine-grained analysis of the linguistic skills of strategists and the forms of knowledge used by them in strategizing. The essential point was that it is through mundane speech events and various micro-level practices that particular ideas are promoted while others are downplayed and specific voices are either heard or marginalized.

These studies provide many insights that facilitate better understanding of the discursive construction of strategies and strategizing. Yet, at the same time, we seem to

know very little about the characteristic discursive features of strategy texts. In particular, there are only a few analyses that focus on strategic plans and the various kinds of discursive and ideological processes and functions at play in these texts. Hodge and Coronado (2006) offer a rare example. In their analysis of the Mexican government's Plan-Puebla-Panama, they illustrated how the discourse on economic reform involved a 'complex' of global capitalist and nationalist discourses and ideologies that was used to promote the opening up of Mexican markets to MNCs based outside of Mexico. Their analysis showed that the form and vocabulary of the document reproduced corporate rhetoric and thus had a fundamental impact on the discursive and ideological struggles. In a similar vein, Laine and Vaara (2007) examined how the mobilization of strategy discourse involved struggles over subjectivity. This study showed how top management can launch a new strategy discourse in order to gain control in and through written and verbal texts, but how this can also trigger discursive and other forms of resistance. These forms of resistance include the middle managers' own strategy discourses, which create room for maneuver and cynicism on the part of employees. Phillips et al. (2008) in turn provided an example of how critical discursive analysis can be used to understand the linkage of strategy as a system of shared meaning, strategy as text and talk, and strategy as truth. Their analysis of strategic change in a large financial services organization demonstrated how actors adopt various subject positions to accept or resist new discursive identities linked with the narratives of change. In our analysis, we wish to add to this incumbent stream of research by examining the distinctive discursive features and force potential of strategic plans from a CDA perspective.

2.3. A CDA approach to strategy texts and their power effects

CDA is a specific discourse analytic methodology that examines the role played by language in the construction of power relationships and reproduction of domination. Therefore it is a particularly suitable approach for our purposes. Our analysis draws particularly on the work of the linguist Norman Fairclough (1995, 2003), who has also examined organizational change from a CDA perspective (2005). As mentioned in the previous section, his work has inspired scholars focusing on strategy discourse (Hodge & Coronado, 2006; Laine & Vaara, 2007; Phillips et al., 2008); however, its full potential in the micro-level analysis of texts has still not been realized in this area.

What differentiates CDA from the other critical discursive analyses is the textual orientation: CDA necessitates a close and detailed analysis of texts (Chouliaraki & Fairclough 1999; Fairclough 2003). This means that any interpretation of discourse should be based on the text's lexical and grammatical choices, which are placed and considered in the pragmatic context of the text. CDA aims to reveal the social, societal, political and economic assumptions in discourses and texts.

In CDA, discourses are not seen as neutral in terms of their political or ideological content (Fairclough, 1989; van Dijk, 1998). This is sometimes readily observable, while at other times it is the implicit presuppositions, or the 'unsaid' elements in the texts, that best reveal underlying assumptions. In fact, texts are capable of circulating and 'hegemonizing' particular ideologies and common sense thinking (van Dijk, 1998). Methodologically, this means that discourses are connected to ideologies through the assumptions embedded in the texts. These assumptions are usually seen as 'triggered' by the linguistic features of text (Fairclough, 2003: 56), and this is why close textual analysis is required in CDA.

Although textual analysis is crucial, proper CDA requires more knowledge of the target phenomena than the text itself can provide. Accordingly, Fairclough (1995) argues that discourses should be simultaneously analyzed at three levels: textual (micro-level

textual elements), discursive practices (the production and interpretation of texts), and social practice (the situational and institutional context). The first textual level implies close analysis of linguistic structures. The second level of discursive practices brings the community and its behavior into play; analysis of discourse in this respect is analysis of what people do with texts. Furthermore, at the third level one then focuses on the broader context: How texts and discourses are used in situational and institutional contexts that they both index and construct. With regard to the interplay of the three levels, we agree with Luke (2002, 100), who describes the method of CDA as 'shunting back and forth between microanalysis of texts, using varied tools of linguistic, semiotic, and literary analysis, and the macro analysis of social formations, institutions, and power relations that these texts index and construct.'

A full understanding of strategic plans requires that attention is focused on both the genre of strategy texts (conventional aspects of their form and language) and the specific discursive features (articulations of the intended discursive statements) of the text. The analysis of genre is important *per se* as there is little general understanding of what strategy texts are like and how their very nature impacts their effects. At the same time, there is a need to examine exactly how specific intended discourses are written into the documents, with a special focus on how they are justified.

It is also vital to observe how the text and specific discourses are then interpreted or consumed. This consumption involves recontextualization (Bernstein, 1990; Chouliaraki & Fairclough 1999; Fairclough, 2003; Thomas, 2003), that is translation of discourses in new contexts. Importantly, when social actors interpret texts, they engage in both less purposive interpretation and more intentional mobilization of discourses for specific purposes. Thus, like production, consumption is a highly political act that may result in the reproduction of initial or intended meanings or lead to very different kinds of views and actions. It is this consumption that ultimately determines whether the 'force potential' of a text will be realized (Fairclough 1992: 82), that is, what the text will accomplish socially: whether and to which extent the textual agency of the strategic text will be actualized, whether it will have performative effects, whether and how it will affect power relations, and whether it will reproduce or transform ideological assumptions. To further elaborate on these issues, we now turn to our empirical case.

2.3.1. Case: The official strategic plan in the City of Lahti

Our research project focused on strategic planning in the City of Lahti. Lahti is located in southern Finland, and has a population of about 100,000. The Lahti city administration employs some 6,500 people. The highest political authority in Lahti resides with the City Council, which is elected by the residents every four years. The City Council includes 59 council members; it has partly transferred its powers to the City Board and specific committees and boards. The city administration comprises the Mayor and the directors of each municipal sphere of authority. As in many other Finnish cities, the role of the city administration has grown over time due to the increasing scope of services offered to people. At the same time, especially since the beginning of the 1990s, Finnish cities have struggled financially.

Our analysis focused on the strategy text produced in 2005; the original version and its translation can be obtained from the authors. This plan was in many ways a landmark in decision-making in Lahti. In 2003 the City of Lahti elected a new Mayor. At the time the City organization went through organizational restructuring and its administrative bureaus were re-assembled under three municipal spheres of authority. Three directors were hired to manage these branches. This meant that when the new City Council assembled in 2005, there were new operative directors in the City's executive group. The new Mayor and his executive group used the 2005 strategy process to launch an

extensive change process in the organization. The new strategy included a contested discourse on the concept of 'omavastuu,' the direct English translation of which is 'individual responsibility' or 'one's own responsibility.'

Our analysis focused on the official strategic plan and its various versions that we examined following Fairclough's (2003) guidelines. Thus, we zoomed in on the linguistic micro-processes and functions of the text. In addition to examining the textual and discursive features of the plan, we analyzed the conditions of its production and the various ways it was put into use, discussed, and referred to in subsequent decision-making and action in the City organization. For this purpose, we made use of extensive ethnographic material gathered on strategic decision-making, including thematic interviews with individuals involved in the process, media texts, and even diaries and emails of some individuals. Altogether we interviewed 37 people, including in practice all the central members of the Administration and the key politicians. The idea was to employ a 'storytelling' approach with the use of a semi-structured interview guide. These interviews were crucial in order to understand both the actual planning, revision, and implementation processes, but also how different people had experienced these processes. All of the interviews were later fully transcribed.

We also gathered copies of the extensive media coverage associated with the strategy process, as well as debates in which the official strategy was used to legitimate or de-legitimate specific projects or changes. Altogether, this material amounted to 193 media texts. Furthermore, we obtained a few personal diaries kept by people participating in the strategy process, as well as the personal emails of some decision-makers. These personal comments provided interesting additional material, illuminating people's genuine personal experiences at various stages of the strategic planning process. All this material helped us to go beyond the final version of the official strategy text, to understand what lied behind specific ideas and expressions, and how central parts of the document were constructed, negotiated and put into use in various arenas.

Our inductive analysis proceeded in an abductive manner (Wodak, 2004); we went back and forth between our theoretical ideas and empirical analyses to create an increasingly elaborate understanding of the various discursive features that seemed to explain the power effects of the strategic plan. In our analysis, we eventually narrowed the focus to five central discursive features: self-authorization, special terminology, discursive innovation, forced consensus, and deonticity. These concepts will be elaborated further in the following sections.

This kind of analysis involves methodological challenges. Discursive and textual characteristics are complex objects to describe and analyze. In particular, it is difficult to place specific elements into their broader context. However, our 'triangulation' strategy – a constant effort to compare our interpretations of the strategic plan with other information gathered – helped to deal with these challenges. This kind of analysis is necessarily interpretative and subjective, which can lead to one-sided representations and conclusions. However, working in a team of three researchers with different backgrounds and meeting with a number of local people representing different professional and political perspectives helped to put things into perspective. Finally, it should be noted that the reporting of this analysis is challenging language-wise: The actual analysis was conducted in Finnish, but the main results were translated into English for this paper. Although meanings and nuances were unavoidably lost in such translations, the richness of the material allowed us to deal with specific problems by constantly comparing several examples.

2.3.2. Self-authorization as a basis for textual agency

A characteristic feature of this strategic planning process was self-authorization. The strategic process began in the fall of 2004 when the new Mayor and his executive group got together to negotiate how the 2005 strategy process should be conducted. In September 2004, they started to convene once a month, together with two consultants that were specialists in the training and consultancy of public management. According to the interviews and documentary material, this work was set up as a 'priority,' meant to 'give new direction to the City,' with the objective to 'provide an overall frame for decision-making.' Consequently, the new strategy was from its onset defined as a particularly authoritative directive text, which can be seen as a prerequisite for its textual agency in this context (Cooren, 2004).

The final document was self-authorizing in nature, which can be seen as a typical characteristic of the strategy genre. In a sense, the strategy communicated its own importance, especially in the case of the metatext, i.e. the sentences describing and defining the purpose and objectives of the plan. The most obvious examples were statements such as the following:

> Strategy is a central tool for leading a city.
>
> The vision, together with the entire strategy, is a municipal council tool for pointing out the direction in which the council wants the city to be developed.

However, this self-authorization was also frequently expressed in more subtle forms in various parts of the plan, as in the extract below:

> New management and operational systems will facilitate strategy implementation. Ownership management and buyer skills will be improved. The role and position of elected officials and their confidential posts will be reappraised to support strategy implementation.

Central here are the propositions that refer to 'strategy' and 'following strategy.' In the first sentence, 'new management and operational systems will facilitate strategy implementation' creates an order where strategy comes first and other things are then seen as instruments for implementation of the strategy. In the third sentence, the effect is more direct and fundamental: the role of elected officials (including the City Council!) is to be adjusted to the requirements of the strategy. Such statements had fundamental implications for the power relations of the various actors, in particular strengthening the position of the administration vis-à-vis the politicians.

Overall, the effects of the strategic plan were most visible in the ways in which it was used as a reference point in subsequent decision-making and the legitimation of actions. The new strategy in particular served to justify a far-reaching rationalization of health care services – which according to our interviewees would not have been possible without the new strategy. As a key manager put it:

> In order to be able to set the criteria, which enabled the cuts and prioritization, we had to have a strategy behind it. (Director)

A seasoned politician put it as follows:

> I have the feeling that when someone on the City Board introduces proposals, they are based on the City's strategy. Like I said earlier, the administration has internalized this quite well. You know, they seem to like it that they have something to lean on when things get tough with the councilmen: they can say that they are just complying with what has already been decided. So I definitely feel that it guides what is happening. (Politician)

Thus, the strategy document became a textual agent, an actor that had the capacity to produce action from a distance (Cooren, 2006; Cooren et al., 2007; Robichaud, 2006). This textual agency was, however, dependent on its mobilization in discussion by the administration and other stakeholders.

2.3.3. Special terminology: Implications for knowledge and authority

Another distinctive feature of the strategic plan was the use of distinctive strategy terminology: the shared and specified lexicon known by strategy specialists as a special discursive community (Swales, 1990). This vocabulary facilitated but also constrained the conventions associated with how to discuss strategies, how write up the strategies, and how to interpret the final text of the document.

The strategic planning process followed the general models of strategic planning, and – crucially for our purposes – was structured by strategic concepts and vocabulary. Strategy concepts and their appropriate interpretation were taught by strategy consultants in strategy seminars organized for the participants in the strategic planning process. The same material (slides, definitions, examples, etc.) was also used in the various meetings where the strategy was discussed and written. In particular, terms such as SWOT, change factors, scenarios, vision, strategic goals and critical success factors became central concepts structuring the conversations. One of the participants described the process as follows:

> Well, we used quite a lot of time to reflect on the basic information and figure out what I would call gimmicking with words. In other words, we pondered the strategic goals and things like which concepts we should use to express them. (Director)

This focus on strategy language may appear trivial at first glance, but it had far-reaching implications in this context. In particular, this language affected the power positions of the various decision-makers, because some of the people mastered this discourse better than others due to their background, education, or exposure to strategic management (for similar observations, see Oakes et al., 1998; Samra-Fredericks, 2003). For example, a participant reflected on the difficulties posed by the 'strategy jargon' in his personal diary:

> Words of foreign origin such as 'scenario' hamper understanding and commitment. It would be important to be more precise and explain what the words mean. (Administration)

The final text relied extensively on strategy concepts. In particular, these terms provided important rhetorical structures for the document. 'External' and 'internal strengths' and 'internal challenges,' 'threats' and 'opportunities' were key concepts that reproduced the structure of a SWOT-analysis. Terms such as vision and mission were used to define the ultimate objectives of the City and its services. This was also the case with 'Critical Success Factors' and 'Balanced Scorecard,' which played a central role in the structure of the latter part of the document. Importantly, such structures brought with them corporate strategy-type conventions that forced the participants of the strategic planning process to make sense of the City's future with a corporate strategy type of logic, along with its ideological implications (for analogous findings, see Hodge & Coronado, 2006).

The importance of an appropriate understanding of strategy concepts was emphasized in the final text, which included a great deal of explanations and definitions:

> Strategic objectives make things more clear and concrete, they open up the vision. They lay out what is meant by the vision, what is going to change and in what direction development should be channelled.

> Critical success factors are core issues or states of affairs whose success or failure affects the success of a public organization decisively over a long period of time.

In both extracts there is a clear explanatory mood, which is seen in the generic claims about strategy concepts and attempts to make give sense to them. Thus, the text seems to be directed at a reader who does not necessarily understand strategy language or the reasoning related to this particular strategy. These linguistic articulations are significant in terms of the interpersonal positioning that constitutes social and political power relations. In simple terms, this means that the authors are constructed as 'experts' with related 'expert power' while the readers need an explanation of what the text essentially means (Bourdieu, 1991). In the strategy context, the implication is the construction of a pedagogic power relationship where the propositions made are very difficult to challenge by those who have not mastered strategy discourse (Oakes et al., 1998; Samra-Fredericks, 2003).

This extensive and systematic use of strategic vocabulary was generally interpreted positively by the administration that had searched for ways to make discussion and decision-making 'more focused' and 'systematic.' However, many politicians expressed reservations about the complicated terms and their meanings. The following is a typical comment from a leading politician:

> It is quite hard, you know, for a politician to explain how things are taken care of to a city resident. We have delegated power to operative directors and municipal spheres of authority ... And then when you think how these things appear to residents when we talk about these fine concepts and say 'We don't know. It's here.' [Taps on the strategy document] So what is our credibility in the long run? Now if we go on like this it will be the executive group that runs the City like a firm. And I don't think it should be like this. (Politician)

2.3.4. Discursive innovation: New buzzwords and their implications

A third crucial feature of the strategic plan were 'discursive innovations,' that is statements that crystallized key ideas about new priorities for the City's strategic decision-making. In this case, the most central new idea was the discourse on 'individual responsibility.' The strategy group not only decided to launch an extensive change process in the city organization but also to promote a new kind of thinking among the residents of Lahti. One of the Directors – a key architect of the new strategy – described the crystallization of this discourse as follows:

> I guess I am to blame for the emphasis on individual responsibility in this project. I have seen in my previous work that cities don't have the economic resources needed to keep all the promises that have been made to its citizens. That is one [factor]. If we refer to these welfare services as a wide concept, demand for them on the part of citizens will continue to grow... In this matter I have often referred to the thinking of [a prominent professor of health policy and management]... Another [factor] is the [individual] responsibility for financing the services – what [services] people are purchasing for themselves. That percentage has to be increased... in addition to responsibility for one's own wellbeing and health. (Director)

As this quote illustrates, the new discourse focused on two things: the need to improve the financial situation of the city and to make the residents adopt a more active role in seeking and financing alternative services. In the strategic plan, this theme of individual responsibility was then introduced and justified with compelling rhetorical choices:

> The City of Lahti will be forced to change the basic premise of its service offerings in order to accommodate growing demand and take into account increasing financial constraints. This means that the city will no longer be able to meet all of the needs of its residents. In the future, the city must encourage people to take more responsibility for their personal well-being and the well-being of their loved ones.

> In the offering of services, emphasis is placed on variety, the availability of choice and individual responsibility.
>
> Promoting well-being requires a new way of thinking. In the future, a larger responsibility for well-being will shift to the people of Lahti themselves and their community. It is in fact a cultural change, a change of attitude, with the intention of strengthening the will of the people of Lahti to support and help each other when the need arises.

In the first extract, the first sentence mentions 'the basic premise of its service offerings.' This nominal phrase is given meaning in the next sentence: the central meaning of the basic premise is to be 'able to meet all of the needs of its residents.' This implies that the City has previously promised to meet all its residents' needs and actually done so. Moreover, it is suggested that this has been a responsibility carried out by the City, but that things will have to change in the future. This transfer of responsibility is thus framed as a strategic innovation that involves dramatic changes in the social welfare system, as articulated in other parts of the strategy text.

The argumentation follows the logic of compulsion: the verbal phrase 'forced to change' expresses deontic modality; the City is under an obligation to change its service supply and the obligation is external or caused by external factors (we will come back to deonticity below). The same rhetoric is backed up by the nominalizations 'growing' and 'tightening.' The inevitability of change is constructed in a declarative mood, for example in the following sentences 'will no longer be able to meet all of the needs of its residents' (first extract) and 'a larger responsibility for well-being will shift to the people of Lahti themselves' (third extract). These formulations help to factualize the state of affairs, and they can be read as promises, threats or orders – depending on the interpretation.

This text also included rather manipulative rhetorical constructions, such as the following:

> Several factors that clearly create future opportunities for the city include the increasing sense of responsibility the residents of Lahti feel for themselves and each other.

The point here is that the SWOT analysis type of reasoning is turned into an argument promoting the new strategy. It is interesting that this sense of responsibility was represented as 'clearly' one of those factors that will create future opportunities. This was an issue that caused much debate in Lahti, it was not an accepted fact as it is presented here. In fact, our interviewees mentioned several times that one of the problems with the strategy text was that skillful rhetoric was used in ways that created 'wrong impressions' and 'simplified the situation.'[5] Furthermore, in the text this point was not balanced by any reflection on the negative effects that more limited service offerings might have, for example on those who are not able (financially or otherwise) to take more responsibility for their own well-being.

The discourse of 'individual responsibility' was launched as a new way of thinking about services that the city offers, along with their organization, and financing. However, the strategy text also led to other kinds of interpretations when the idea of individual responsibility was discussed after the launching of the new strategy. The following are typical examples of different interpretations:

> Well, in that sense we are pioneers in strategic thinking regarding this issue [individual responsibility]. In the strategies of other cities, they haven't dared to say that the residents have

5 The participants of the strategic planning group felt that all people did not really understand the implications of the text that they were discussing. The following diary entry of an administrator is revealing: 'Again the comments focused on stylistic issues. I'm afraid that no one understands that we are moving towards a decrease in the level of service.'

> to take on more individual responsibility. Now even the state level has woken up to the issue: 'yeah, maybe it has something to do with the residents or citizens themselves taking care of these things.' You know this term 'individual responsibility' has clearly started to take on in the Ministry of Social Affairs and Health and such places. (Administrative official)

> It is also a kind of ideological choice, or I think it is, that we are changing the city organization from a kind of caretaking society where everyone is taken care of and society is responsible for taking care of everyone, towards... I don't know too much about American society but, at least, it is strikes me that we are moving towards the American way, where everyone takes care of themselves. Like it would no longer be society's responsibility to take care of its members. (Politician)

Whilst the interviewee in the first quote articulates the discourse of 'individual responsibility' as an innovation, the second quote shows a very different way of looking at its effects. Thus, 'individual responsibility' was at the center of an ideological struggle. In very concrete terms, the new discourse implied a shift from a Nordic welfare regime towards a neo-liberal market economy that some people supported and others resisted. In several instances, the strategy text loosened welfare engagements and reduced the importance of the values and institutions contained in the traditional Finnish and Nordic model, thereby moving towards a neo-liberal order. However, people interpreted its actual meanings and implications in very different ways.

2.3.5. (Forced) consensus: Formal closure and its implications

A fourth intriguing discursive feature was the focus on 'forced consensus,' that is the need to reach some degree of unanimity or alignment for the strategic plan. Although there were radical differences of opinion between individuals, political parties, and between elected leaders and civil servants concerning the new 'individual responsibility' discourse, these disagreements are not apparent in the text. Instead, the final text serves as formal closure of the discussion (for similar observations, see Iedema, 1999).

The pressure to reach consensus was probably most clearly visible in the case of 'individual responsibility.' When this new discourse was brought up, it was initially strongly resisted. However, the negotiations eventually led to new formulations of the text, as well as to novel interpretations of what 'individual responsibility' actually meant. After a long negotiation process with different interest groups, this notion of 'individual responsibility' maintained its place as a central part of the strategy text. One reason this happened was that the politicians in particular were able to link 'individual responsibility' with 'activeness,' that is with being an active member of the community, which was on the whole seen as positive. Another reason for why the discourse was finally accepted was that the actual textual passages were 'sweetened' so that enough political constituencies could support the whole document.

The final document reflects a strong unanimity of opinion. In fact, this unanimity is even explicitly emphasized in several instances. For example, the text for the 'Strategic Goal Number One' starts as follows:

> The inhabitants of Lahti, its political and civil servant leadership, and its employees will have a common, realistic understanding of the city's opportunities and the expectations related to them.

This kind of unanimity adds to the power of the strategic plan, as it supposedly represents the agreed upon objectives of key decision-makers. In this case, the crucial issue was that the City would no longer be the only actor seen as responsible for providing welfare services, and that welfare was now to a large extent also the obligation of the people themselves. This was most evident in terms of the implications of 'individual responsibility.' Consider the following extract:

> Services will not be provided according to production capacity, but will be based on real customer need.

The articulation of the extract refers to two alternative arguments: services are organized either 'according to production capacity' or 'based on real customer needs.' The use of negation in the first sentence and the word 'real' in the second one leads to an interpretation that the services are or have been organized on the basis of a false logic that now has to be changed. This new logic is indeed fundamentally different from the previous one: it implies a shift from a Nordic welfare state model towards a neo-liberal ideology.

Not surprisingly, the individual responsibility discourse became the most contested issue in the interpretation of the strategic plan. Many people were happy about the decisive new strategy and the guidelines it provided. However, others felt that the discourse contained ideas and ideological implications that were not spelled out, but skillfully written into the text under the auspices of consensus without a fuller discussion of their exact meaning or implications. Two of them put it as follows in our interviews:

> It includes a lot of value discussion that has not been spelled out. (Director)

> There was a strong sense that we were being fooled. Sentences were included that promoted privatization even more. (Politician)

Thus, the forced consensus was at times challenged by critical readings of the document and the way it was crafted.

2.3.6. Deonticity: From declarative statements to imperatives

Finally, a fifth characteristic discursive feature was the deontic orientation of the final document, i.e. its obligatory and imperative nature. Deonticity deals with a combination of a semantic component meaning 'so-be-it' and necessity (Lyons, 1977: 823-830). According to this view, deonticity involves a reference to a future state and is connected with intention. Interestingly, the strategic planning process did not start with imperatives in mind, but rather moved from future-oriented scenario analysis toward more precisely stated objectives. A key manager described this preparation as follows:

> We began as is usually the case with environmental analysis [...] and then moved on to purpose and vision, objectives and strategic goals and critical success factors, and so on. It was very much like a typical process in corporations.

Although the grammatical sentence types in the strategic plan document are at first glance purely declarative, the grammatical mood becomes different when we take into consideration the purpose of the text, which is to guide future action. This means that a grammatically declarative statement turns into an imperative one. Halliday (1994, 354-367) calls these kinds of shifts metaphors of mood, as a sub-class for grammatical metaphors. Consider the following examples:

> The city's finances will strengthen to the extent that the contribution margin will suffice to cover all net investments and even pay off the debt.

Strengthening the income base, along with changes in the service structure and process, will assist in balancing the city's budget. Taxation will not be relied on as the primary agent for balancing the budget. The city's ownership policy is profitable, and the required return on this capital is obtained.

The point is that when the text is considered as a directive text that provides guidelines to be followed, these kinds of seemingly declarative statements are interpreted as imperatives. Thus, declarations such as 'finances will strengthen,' 'will assist in balancing the city's budget,' taxation will not be relied on,' and 'ownership policy is profitable' become directive obligations for the administration and other decision-makers.

The implications of deonticity can be seen as performative effects of the strategy. This is how one of the key Directors summarized the implications:

> It [the strategy] has clearly defined the economic framework, allowing us to cut personnel and modify operations so we could manage with fewer employees. It also assisted with changes in payment and rate systems. We had to re-think our operations to determine how we could hike up prices and rates and also cut expenses linked to those operations. We had to figure out how assignments would be arranged and what operations and services had to be omitted. (Director)

Note too how strategy is referred to as an agent; it is the strategy, which has 'clearly defined the economic framework.' Another Director put it as follows:

> Different service structures have been reduced, e.g. care subsidies for close relatives. I mean ... in spite of everything, it is essential that we scale back the existing service structure in Lahti. And perhaps the political system didn't understand. (Director)

Such quotes are illuminating examples of the strategy text's realized force potential. The interviewees' interpretations of the effects of the strategy indicate the use to which the strategy was put in the City organization of Lahti. In essence, as shown above, the strategy text can be considered an order to downsize the service structure. However, in the second quote the comment 'And perhaps the political system didn't understand' points to the fact that there was a struggle over the exact meanings of the strategy text. The contradictions in the text were not fully resolved, as some people continued to resist straightforward interpretations when the text was used as a basis for subsequent decision-making. This is not surprising considering what we know about the production of the text; in particular how politicians in specific stages felt bypassed in decision-making. Thus, the deontic effects of the text could at times be resisted by alternative interpretations.

2.4. Conclusion

Although recent studies have adopted critical discursive perspectives on strategy (Hodge and Coronado, 2006; Laine and Vaara, 2007; Phillips et al., 2008), there is a lack of understanding of the linguistic micro-processes through which specific discourses are written into strategy texts and how their power effects come into being. Hence, the objective of this paper has been to examine the discursive characteristics that help to explain the power of strategic plans as influential directives. Table 1 below summarizes our main findings.

In our analysis we have focused on the force potential of strategic plans (Fairclough 1992), involving its textual agency, performative effects, impact on power relations, and ideological implications. While there is much more to this issue that we have been able to highlight in this analysis, our CDA perspective at least shows that such force potential relates on the one hand to the genre itself and on the other to specific discursive choices. At the same time, as our case vividly illustrates, it is the crucial role of the subsequent mobilization of the discourse that ultimately determines whether the text will have textual agency (Cooren, 2004) and specific power implications. Thus, the power effects of texts must in the end be linked with the production and consumption

of the texts (Hardy & Phillips, 2004) and the related ‘circuits of power’ (Clegg, Courpasson & Phillips, 2006).

Table 2 Discursive characteristics as the basis of the force potential of strategic plans

	Conditions of production	Textual characteristics	Observations on consumption	Power effects
1 Self-authorization	Emphasis on the importance of strategy work	Frequent references to the authoritative role of strategy (especially in metatext but also in other parts of the document)	The textual agency of the strategic plan as an authoritative text is realized by using it as a reference point in subsequent decision-making and legitimation of action	Prioritization of strategy as the overall guideline for decision-making and action Use of the strategic plan to legitimate or resist subsequent decisions or actions
2 Special terminology	Strategic concepts and terminology as a basis of planning, conversations and writing of the document	Use of strategy concepts as central rhetorical structures	Different interpretations depending on the mastery of strategy vocabulary and agreement with the ideals of corporate strategy	Reproduction of the ideals and ideologies of corporate strategy Implications on the power relations of social actors depending on their knowledge and ability to use strategy concepts and vocabulary
3 Discursive innovation	Focus on specific discursive statements that spell out the priorities	Focus on the new discourse Compelling justification of the new discourse	Different interpretations depending on agreement with the new discourse and its implications	Performative and ideological implications stemming from the new discourse
4 Forced consensus	A need to reach a degree of unanimity and alignment in strategy work	Explicit and implicit references to consensus and its use as authorization of statements	Reproduction of consensus in subsequent discussion Challenging of the consensus by critical comments	Consensus as authorization for the implementation of the strategic ideas
5 Deonticity	Declarative statements as an explicit goal in preparation of the document	Declarative-imperative mood (shifts from declarative to imperative mood when the purpose of the text is taken into account)	Reproduction of imperatives in subsequent discussion and decision-making Challenges coming from critical interpretations	Performative effects resulting from the imperatives

We believe that this analysis has important implications for our understanding of the role of language in strategy. In particular, it helps to better comprehend the specific micro-level discursive and textual processes through which strategy documents impact strategizing and decision-making in general. Thus, this analysis adds to the previous literature on the discursive underpinnings of strategy (Knights and Morgan, 1991), the mobilization of strategy discourse (Hardy et al., 2000), and also its enactment in conversations (Samra-Fredricks, 2003). In particular, our analysis complements the recent analyses adopting critical discursive perspectives of strategy and strategizing (Hodge & Coronado, 2006; Laine & Vaara, 2007; Phillips et al., 2008) by focusing attention on the discursive underpinnings of the power of strategic plans as influential texts. The crucial point is that this kind of analysis makes it possible to see how the institutionalized use of strategy language has implications: some of these emerge from the genre itself while others derive from situation-specific choices. In any case, one thing is certain: strategy documents should not be treated as just any texts, but understood as powerful devices through which specific objectives, values and ideologies – and not others – are promoted and legitimated. Importantly, some of these effects are apparent, but many others easily pass unnoticed.

Discursive practices are a crucial part of the social practices constituting strategy and strategizing. By analyzing the key role of texts and related discursive practices from a critical perspective, our analysis contributes to the broader 'strategy-as-practice' stream of research (Jarzabkowski, 2005; Whittington, 2006) that has been lacking in such analyses. In fact, precisely these kinds of critical discursive examinations have been called for in the recent debate around 'strategy-as-practice' (Carter, Clegg & Kornberger, 2008a; Jarzabkowski & Whittington, 2008; Carter, Clegg & Kornberger, 2008b; McCabe, 2010).

We also think that the analysis has implications for discussions regarding community planning and politics (Forester, 1989; Rakow et al., 2003) and New Public Management (du Gay, 2000; Ferlie et al., 1996; Hood, 1991). While previous studies provide insightful analyses of power and ideology in public sector reform (Forester, 1989; Norton & Sadler, 2006; Rakow et al., 2003), our analysis adds to this literature by focusing on the power of official strategy documents as vehicles through which specific social and societal changes are promoted, legitimized and naturalized in the 'post-bureaucratic era.' The point is that these texts do not only promote – or in some cases challenge – particular kinds of reforms, but also determine and redefine the power and subjectivity of various social actors (Thomas & Davies, 2005). As the Lahti case demonstrates, this is especially the case with respect to decision-making power and participation in strategic decision-making.

We believe that most of the discursive practices that we have highlighted in our analysis play a central role in other strategy plans as well. However, we wish to emphasize that any serious CDA of specific strategic plans should take the context seriously and focus on highlighting the central textual choices that make a difference in that setting. It would therefore be important to study strategy texts in other institutional, organizational, national, and cultural contexts and to compare the findings. This would lead to a better understanding of not only the strategy texts *per se*, but also the conventions in writing and editing strategy documents and the various ways in which power and ideological struggles are played out in and through these texts.

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3 STRATEGY AS TEXT AND DISCURSIVE PRACTICE: A GENRE-BASED APPROACH TO STRATEGIZING IN CITY ADMINISTRATION[6]

3.1. Introduction

Strategies have come to play a significant role in business as well as in other organizations. It is hard to find a company that would not somehow structure its decision-making or reflect upon its identity with strategy concepts. Furthermore, strategic management has also colonized other organizations to the extent that universities, hospitals, schools, and even kindergartens now systematically produce and consume strategy texts.

The wide spread of strategy concepts has directed researchers to pay attention to the discursive aspects of strategy (Knights and Morgan, 1991; Hendry, 2000; Vaara et al., 2004). These studies have pointed out that strategy can be seen as a discourse which has its own specific conditions of possibility and that these conditions enable certain ways of acting while at the same time they restrict other actions. The fact remains, however, that there is a lack of systematic analysis on strategy texts, which is unfortunate given their central role in strategizing and organizing in contemporary society. In this paper, we attempt to partially fill this research gap by examining the special characteristics of genre of strategy discourse.

Our analysis of genre combines an analysis of the textual features of a strategy document with an analysis of the production and reproduction of the document in face-to-face interaction. The use of various linguistic forms and structures in a strategy document and in the editing process are not arbitrary, but are in fact motivated by social conventions. In other words, the genre of strategy discourse provides textual structures and vocabulary for any strategy. Furthermore, the genre may be seen as a socially recognizable practice of strategy work, which means that the production processes of strategies are institutionalized practices characterized by intertextual negotiations and reworkings of text. Therefore, while we speak of a genre of strategy discourse, we refer not only to textual patterns but also to the face-to-face interaction of strategists that is intrinsic to strategizing.

By examining these two interconnected levels of genre we show that the genre of strategy discourse is by its very nature definitional. We show that while strategy text and talk aim at defining the form and content of strategy they simultaneously include statements that leave room for different understandings. This ambiguity of meanings is an essential part of strategy work and it is a key part of the intersubjective and intertextual processes of negotiating strategy.

3.2. Strategy as discourse

The roots of strategy discourse can be found in ancient military strategy (Sun Tzu, 1971), but the word ‘strategy’ comes from ‘strategos’ in Greek. In the military context, it has come to mean the “the art of the general.” However, in the past century, ‘strategy’ and associated concepts have spread to other areas such as management.

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The diffusion and legitimation of organizational strategy discourse is closely linked with the institutionalization of corporate management. In early 20th century, corporations grew into dominant organizational and juridical forms under which businesses could be developed in the US and elsewhere. Later, ownership and management became increasingly distinguished functions, which paved the way for the professionalization of corporate management. In the post-war era, especially US corporations grew and conquered new markets at an unprecedented pace. In this situation, corporate managers faced new problems and challenges that called for new conceptual and practical tools. 'Strategy' provided a readily available vocabulary. It also seemed to fit very well with neo-liberal ideology, which promotes corporate competition and expansion. Thus, 'strategy' emerged as a particularly suitable discourse for making sense of and giving sense to the new challenges of corporate management. This has been followed by an increasing expansion and diffusion of strategy discourse in and around business and other organizations. In a word, 'strategy' has to a significant extent replaced what was previously called 'long-term planning' or simply 'decision-making'.

Parallel to this development, we have seen the emergence of 'strategic management' as a specific management subject. This literature has been strongly influenced by positivistic ideals of normal science and pressures to provide normative advice for managers (Shrivastava, 1986; Levy et al., 2003; Ezzamel and Willmott, 2004). As a result, strategic management has not been open to critical analysis. However, in recent years, we have seen the emergence of studies adopting various critical perspectives on specific practices and discourse that constitute strategy and strategizing in a range of organizational settings. In particular, we have witnessed the emergence of a literature on *strategy discourse*. Some studies have examined strategy as a body of knowledge and analyzed the various kinds of power implications that the language of strategy has for organizations (Knights and Morgan, 1991). Their analysis has inspired other theorists to examine strategy through a critical lens (Hendry, 2000, Lilley, 2001, Levy et al., 2003, Grandy and Mills, 2004; Samra-Fredericks, 2005). Other studies have focused on the role of narratives in strategy processes in organizational contexts (Barry and Elmes, 1997) and examined how discursive resources can be employed for strategic purposes (Hardy et al., 2000, Maitlis and Lawrence, 2003). Still others have examined how specific roles and identities are reproduced during organizational interaction and conversations around strategizing (Samra-Fredericks, 2003, 2004, 2005; Laine and Vaara, 2007).

Specific features of strategy texts have also been examined in linguistic analysis. However, this stream of research has remained disconnected from the organizational strategy discourse analyses referred to above. Nevertheless, key insights have been gained by studies focusing on mission, vision or value statements (Swales and Rogers, 1995; Connell and Galasiński, 1998; Williams, 2008). In their analysis, Swales and Rogers (1995) identified rhetorical strategies that were "designed in order to ensure maximum employee "buy-in."" In like vein, Williams (2008) states that mission statements are "decidedly persuasive," as their goal seems to be to encourage identification of employees and other constituencies of organizations. Various studies in this field of inquiry have highlighted commonalities that speak for the existence of a strategy genre or at least a genre colony (on genre colonies, see Bhatia, 2004). However, these analyses have also pointed out that the communicative purposes of these texts may vary considerably. This is consistent with what Seidl (2007) has remarked on the conceptualization of strategies. He argues (ibid.: 206) that "different organizations may use the same labels for their strategy concepts, but the concrete practices behind the labels could be different."

3.3. Analysing strategy as genre-based activity

We adopt a view that emphasizes that 'genre' is above all a way to get things done. In one form or another, this is the underlying conception of genre in most linguistic genre theories (Bazerman, 1988; Swales, 1990; Bhatia, 1993; Bhatia, 2004). In our view, 'the way of getting things done' is closely related to the notion of discursive practice. In this spirit, Fairclough (1992: 126) has noted that genre implies not only a particular text type, but also particular processes of producing, distributing and consuming texts. Thus, genres become visible and are exploited both in the textual structuring of specific texts and in the specific institutional or professional contexts that they are a part of. Hence, analysis of the genre of strategy text implies discursive practices of writing, creating, receiving, using strategy, and sorting out the text type of strategy text.

Our analysis resonates with Bhatia's (2004: 18–22) multiperspective model of discourse, in which he distinguishes the analysis of discourse as text, the analysis of discourse as genre, and the analysis of discourse as social practice. Bhatia introduces a genre-based view, which is characterized by a quest to bring together these different levels, with a final aim of going beyond the textual space of description towards the social space of explanation. As Bhatia explains (2004: 21–22), the genre-based view pays attention to textual features of language use and to features of social practices. The central focus of the genre-based view on discourse is, however, on professional practice. Then, the analysis of discourse as genre means the analysis of how a text is constructed and how it is interpreted, used, and exploited to achieve particular goals (Bhatia, 2004: 20). Similarly, Fairclough's (1989; 1992; 2003) methodological outline of discourse analysis distinguishes discourse, genre and style as essential parts of critical discursive analysis. In this framework, genre and genre chains play a specific role in the enactment and recontextualization of discourses.

In our analysis, the focus is also on professional practice, namely, the practice of strategizing. We see this practice as discursive in very concrete terms: the practice of strategizing is characterized by negotiations over meanings embedded in the actual and potential choices in strategy text. In a way, the analysis of discourse practice complements textual analysis, as it underscores the importance of textual features in both the production and consumption of the text. Moreover, this approach allows us to view strategizing as a social practice that is rooted in a specific social context. In our case, the specific context of city administration means that strategizing is linked with specific kinds of decision-making traditions and societal and social politics.

3.4. Case: Strategizing in the City of Lahti

This research was carried out in the City of Lahti, which is a large city in southern Finland. In Lahti, as in many other Finnish cities, the role of the city administration has grown over time due to the increasing scope of services offered to people. However, especially since the beginning of 1990s, Finnish cities have struggled financially. In response to economic conditions, city administrations have sought tools and practices that would help to better control, facilitate and manage decision-making in order to cut the costs of their service offering. Strategic planning, introduced in Lahti by the city administration at the end of 1990s, was seen as a useful method for decision-making in dealing with the challenges posed by increasing budgetary constraints and the growing costs of the service offering.

In our analysis, we have focused on the city's official strategy document of 2005. The document is written in Finnish, and the length of the document is 2850 words, consisting of 225 sentences (not including fragments). The first part of the document includes a basis for the strategy compilation, the strategic foundation for the City of

Lahti, mission and vision statements, and strategic objectives. The second part consists of critical success factors, evaluation criteria and target levels that have been combined into scorecards that examine the operation of the city organization and its development.

To better understand the discursive practice of producing and interpreting strategy, we make use of the meetings of the City's executive group during the strategy updating process. In these meetings, taking place once a week during spring 2007, altogether eight key decision makers discussed and debated over what should be included in the updated strategy document. These discussions focused on deciding the key concepts that should be included in the strategy and also on defining the meaning of these concepts. The discussion examples dealt within this paper are taken from these meetings. 14 of altogether 16 meetings were recorded with a digital voice recorder.

3.5. Analysis

Our analysis has two parts. First, we focus on the generic features of the actual strategy text. In particular, we analyze the specific communicative purposes that may be read off the text: education, self-legitimation, guiding future action, building identity, and promotion. We also zoom in on specific lexico-grammatical features that are central to this text. Second, we examine the actual negotiations around the strategy text. This analysis shows that the written strategy text is produced and consumed in an intertextual process of negotiation. In particular, we illustrate how these negotiations often focus on the definitions and redefinitions of specific concepts.

3.5.1. Textual analysis: Communicative purposes and lexico-grammatical observations

Regarding the typical organizational structure of strategy texts, it is fairly easy to determine a genre of strategy. Numerous business guides (e.g. Hargrave, 1999; DeThomas and Grensing-Pophal, 2001) provide ready structures for a written strategic plan and thus support the existence of a strategy genre. These structures include the basic concepts to be used, the order of the text's elements, and also the typical schematic structure of a strategy. In all these respects, the strategy document of the City of Lahti may be viewed as a typical strategic plan. It uses concepts such as 'vision,' 'mission,' 'critical success factor,' 'threats and opportunities,' all of which recur in "how to write a strategy" guides. The document also complies with the proposed disposition of strategy text sections and the discourse structures that are assigned to these sections in strategy writing guides.

Interestingly, the text is characteristically educational. In particular, the text includes a great deal of metadiscourse, text that explains to the reader the logic in the propositional content of strategy. The following are typical examples:

> Strategic objectives make things more clear and concrete, they open up the vision. They lay out what is meant by the vision, what is going to change and in what direction development should be channeled.
>
> Critical success factors are core issues or states of affairs whose success or failure affects the success of a public organization decisively over a long period of time.

In both extracts there is a clear explanatory mood, which is seen in the form of generic statements and claims concerning the meaning and use of strategy concepts. The text seems to be directed at a reader who does not necessarily understand strategy language or the reasoning related to this particular strategy.

There are also clear self-legitimating features in the text. In the following two examples the importance of strategy is highlighted.

> Strategy is a central tool for leading a city.
>
> The vision, together with the entire strategy, is a tool of the municipal council for indicating the direction in which the council wants the city to be developed.

Here the goal of the strategy, the reason for its existence, is stated. It is 'a tool for leading.' At the same time as these self-legitimations explain the importance of strategy in the City of Lahti, they also construct a context where strategies, in city administration or any other organizational setting, are important. There seems to be a need to tell explicitly what a strategy is and why it is like it is.

Another communicative purpose of the text is to guide future action. In the literature of strategic planning, a recurring theme is that strategy is a plan; it is the means of getting from here to there (see e.g. Mintzberg, 1994 for various understandings of strategy). This evokes future-oriented language[7]: in the strategy of the City of Lahti various states of affairs are construed as taking place in the future.

> In the future, a larger responsibility for well-being will shift to the people of Lahti themselves and their community.
>
> The inhabitants of Lahti, its political and civil servant leadership, and its employees will have a common, realistic understanding of the city's opportunities and the expectations related to them.

In addition to words (e.g. 'future', 'develop', 'new', 'renew') and constructions that express future time (Crystal, 2002: 112–115), the document is characterized by seemingly timeless expressions:

> The City of Lahti capitalizes on its good location and invests in projects – for example the development of the Kujala area – that strengthen its logistic position.
>
> Ownership management and buyer skills are improved.

In a context where strategy is seen as a plan, these seemingly timelessness expressions are clearly future-oriented. When a strategy is read as pointing out the means of getting from here to there, these expressions can be read as commissives and directives: to the citizens of Lahti they would be promises of some kind of future actions, and to the city administration and its various municipal spheres they would be directives to take some actions that lead to the propositions made in the statements.

Like corporate mission statements (Swales and Rogers, 1995), this strategy text fosters affiliation and identification. In social psychological terms, the language thus builds positive social identity. At the same time, it constructs the social category of Lahti as a unified whole: the virtues associated with Lahti ('… place for skilled, creative people', '… made up of active people that respect themselves and others') in the text invite the reader, in a manner of speaking, to identify with Lahti society.

Also, the text is promotional in nature. This means that the communicative goal of strategy extends to promotion. In other words, its goal is to contribute to a favorable reputation, which means being attractive to stakeholders such as residents, tourists, residents of other cities and the media, as well as to companies and other organizations in the Lahti region. It should be added that the promotional elements are not necessarily mere extra or additional functions of the strategy document. On the

[7] Note, the original strategy document being written in Finnish, that the Finnish language does not have a grammatical category of future tense. Instead, there are several structures that express futurity.

contrary, the promotional function is an essential part of strategizing – as an instrument of image building.

With regard to the important lexico-grammatical features, the authority and voice in the strategy text are interesting. Studies of written bureaucratic discourse (Sarangi and Slembrouck, 1996; Shuy, 1998) have shown that the prevalence of passive verbs is a common feature in bureaucratic and administrative texts of both business and administration. This also holds true for the strategy of the City of Lahti: the passive voice is used in 78 sentences out of a total of 225 sentences in the text (not including fragments). Like in the excerpt '…buyer skills are improved', passives indirectly refer to actions of the city administration. Implicitly, then, the city administration is the agent in these sentences. Importantly, however, the Finnish passive has a strong meaning of open reference (see e.g. Shore, 1988; Helasvuo, 2006), which means that it allows multiple persons to identify with its reference, and in particular, it often allows a 'we-interpretation.' In a sense, the passive construction implicitly calls for a 'we-interpretation' at all organizational levels of the city.

In the active voice sentences, 'city council' is displayed as a subject only three times, and 'city administration' not at all. It seems that neither the 'council' nor its hypernym 'administration' is topicalized, and, as a matter of fact, they are hardly mentioned at all: the document contains only three occurrences of 'council' (each of them as a subject). Added to this, the first-person-plural is used only once ('The vision expresses how we hope the city will develop').

Instead, there are 72 occurrences of the 'city' (9 times as a subject) and 53 occurrences of Lahti (11 times as a subject). In most of these cases, 'the city', 'City of Lahti', or just 'Lahti' are metonymic expressions; they stand for the legal entity of the city. This usage corresponds to the popular phenomena of using company names as metonymies[8] for their boards or otherwise responsible agents. This is, of course, consistent with the fact that corporate boards as well as elected city councils have a legal right or even a duty to speak for the whole.

> The city of Lahti will focus on its core tasks and prioritizing of its services. Lahti will continue to offer services that the inhabitants will supplement themselves by procuring services from other providers.
>
> The city commits to continuous renewal and development that is planned and executed together with the employees.

In the first excerpt above the both subjects seem clearly to denote city administration. Notice that in the second sentence Lahti is distinguished implicitly from its inhabitants. Similarly, the latter excerpt displays 'the city' as a separate entity out of which the category 'employees' is distinguished. This is related to power relations: the city council as the producer of strategy has the power to work with social categories discursively. In some cases, for example 'Lahti' could be displayed as a unified category consisting of all Lahti society (inhabitants as well), but in other cases the city council uses the power of dividing the category into smaller units. In general, however, the document does not construct the city administration and the political leadership as separate from the citizens. For instance, the document lacks any such expressions that would directly address the citizens as readers of the strategy (e.g. inhabitants as voters). These would include expressions such as 'your administration' or 'your city.'

[8] The study by Cornelissen (2008) revealed that metonymies such as substitutions where an organization stands in for its members, products, facilities, stock or shares or a company-related event, are a central part of people's talk about organizations.

In some uses the reference of Lahti is vague, and the locational meaning becomes highlighted ('a meeting place', 'place to meet', 'part of the metropolitan area'):

> Lahti develops and renews itself with an open mind, acting as a meeting place for skilled, creative people in business.
>
> Lahti is a growing city that is part of a metropolitan area made up of active people that respect themselves and others.

Besides the locational meaning, Lahti clearly has features of an animate, conscious subject, as it 'develops and renews itself with an open mind'. And at least by implication, the city administration plays a crucial role in all these desired or factual states of affairs.

In all, this strategy text is characteristically definitional. However, the document is rich with statements and claims that leave a lot of room for different understandings. For example, the text includes a number of nominal phrases, such as 'strengthening the income base,' 'successful communications,' 'the addition of the individual responsibility of regional inhabitants,' which all imply some sort of actions. Thus, there are several possible actions implied, and therefore the contextual meaning of such phrases is left vague, giving rise to possible multiple understandings.

There are two important implications here: First, the administrators and politicians who are in charge of the strategy and its implementation have specific power to interpret the vague or ambiguous meanings in the strategy text in their own way. This could be called strategic ambiguity (on the concept, see Eisenberg, 1984). Second, and relatedly, the strategists either cannot or do not want to offer complete closure in terms of the definitions. This underscores the intersubjective and intertextual processes in the actual production and consumption of strategy texts.

3.5.2. Analysis of conversation: Intersubjectivity and intertextuality

We turn now to the discursive practice of producing strategy and strategy text. Our view emphasizes the fact that the text is a product, produced in a specific manner and in circumstances under which the role of intersubjectivity and intertextuality becomes evident.

The production process involves meetings with debates on what to write down, writing practices, revising text, and making and discussing further choices. This is a process of continuous intertextuality, where what is said and what is argued in meetings and negotiations is given a textual form that is again taken under debate and conversation. Moreover, the text is intertextual in the sense that it builds upon strategy discourse, which is in turn built upon both societal discourses and various corporate discourses.

The following extract[9] illustrates the production of text through negotiation over meanings in text. The purpose of the entire meeting is to clarify the meaning of the concepts of 'basic social services' and 'basic social security'. Furthermore, the aim is to understand how these concepts are used in contemporary strategy text. In addition, the strategists connect the discussion to the discourse of 'individual responsibility', which is an important underlying context throughout the strategy.

[9] This is a translation of the original discussion in Finnish. Participants in the conversation (marked as S1, S2 etc.) are directors from different municipal spheres in the City organization.

Basic social services.

1 S1 But let's define basic social services then.

2 S3 Or is it basic social services or basic social security?

3 S1 Basic social security is narrower in my opinion (.) basic social services is broader.

4 That is, I don't know why they ((politicians)) wanted that basic social services

5 to be there.

5 (4 LINES OMITTED)

6 S2 But because they pretty much covered that, or understood that basic

7 social security in the (.) what you first said (.) in terms of legislation. It is

8 narrow (.) the concept of basic social security.

9 Therefore it [should be defined then.]

10 S5 [Lawyers keep telling me] that it's broader than

11 you can imagi[ne].

12 S3 [He]::h.

13 S2 [Yeah], sure, that's what we think [too].

14 (8 LINES OMITTED)

15 S6 °That°- now the increase of individual responsibility shifts- (.) it is, you know,

16 narrowed for the reason=

17 S2=Well one might easily draw a conclusion from that (.) [is] that so?

18 S1 [No]

19 but if this basic social security is defined in a way

20 I just read from that, it is quite narrow.

21 S3 Umh. ((showing agreement))

22 S1 Until the moment, whe- when you start to get hungry or you don't have

23 a roof over your head or clothes, then comes society. It could be interpreted this way.

24 S4 Still, we might consider it a bit more, heh.

The extract shows the directly intertextual nature of strategy. The intertextual relation is first built between the official strategy document of 2005 and the forthcoming revision of the document. Intertextuality is also manifested. For example, in line 20 speaker S2 refers to the strategy document (…'I just read from that'…) and the document and its lexical choices are also made apparent in S1's turn in lines 04–05 (…'don't know why they wanted that basic social services to be there'.). The turn represents in fact two kinds of intertextuality: on the one hand it refers to the fact that in the strategy document there is a phrase 'basic social services' (in written form) and

on the other hand, the same turn refers to the existence of prior discussions and decisions that have materialized in text.

The whole extract reveals, however, the important role of intertextuality in the strategy process. Discussing strategy and revising it, or the creation of new strategy, are all tied to existing strategy. In short, strategy is read and interpreted, and then the interpretations are discussed. This shows that the discourse practice of group conversation is a tool for interpreting text, and finally the attempt is to produce new text. But there is more to this: as Fairclough (1992: 102–103) suggests, texts can transform prior texts. In the extract we may see that negotiation over meanings and the pursuit of defining meanings as well as providing them with a relevant context do indeed transform prior text, or, as the text becomes interpreted and needs to be interpreted again, its choices are recontextualized.

When considering the task of the conversation, the request 'Let's define basic social services' (line 01) is revealing. As an opening turn it defines the purpose of the conversation. Hence the requested purpose is to define basic social services collaboratively. As the request is evidently approved, it follows that the conversation is about negotiating meanings. But in addition, the business of negotiating over meanings also constructs a discourse practice of strategizing as social action where it is relevant to define concepts and consider meanings from different angles and to achieve a shared understanding. Significantly, the objective of the discourse practice is to create text, to find agreement on which concepts to use and how to use them.

Our last extract highlights the negotiation of strategy concepts. The conversation underpins the practice of strategizing as an intersubjective activity of giving a contextual sense to strategy concepts.

Strategic goal or critical success factor?

1 S1 Yes but it has to be measurable, hasn't it, that critical success factor. You [should be able]

2 S3 [Exactly]

3 S1 to measure it somehow. That is (1.0) in my opinion it's the customer- resident

4 satisfaction enquiries that are made. And they give some index number

5 about how considerable is the number of satisfied ((residents)). That would

6 be at least our objective with what we °operate°. Then the (.) satisfact- residents'

7 satisfaction towards those operations is what we aim for. That is where

8 we, at least, must succeed if we are going to reach the strategic goal.

9 S3 Whhell (0.2) yes. So you aren't suggesting that as a strategic go[al] but?

10 S1 [NO] no

11 S3 Yes, well

12 S1 But as a critical success factor.

13 S2 Well er that has been our criteria here at section four ((reads loud from

14 the strategy document)) well-being, environment and comfortable living.

15 The residents'satisfac[tion].

16 S1 [yes]

17 (3 LINES OMITTED)

18 S3 But did you think (name of S1) that this would be placed here in in ((strategic goal))

19 number one? If [we]

20 S1 [Yes] I would specifically put that there in the number one.

21 (4 LINES OMITTED)

22 S1 But then if we still talk about these critical success factors here in number one.

23 Well (0.2) this profitability of municipal co-operation. That is, it is the increase of

24 effectiveness that we pursue with this project to restructure services and municipalities.

25 (3 LINES OMITTED)

26 But it just backs up the fact that we are able to take care of certain services with

27 certain standards.

28 (5.0)

29 S1 These things depend on the way you think of them. During a single

30 day at least in a couple of ways.

Evidently, the strategists are in this extract trying to determine the strategic goal and establish the difference between strategic goals and critical success factors. The extract begins with S1's turn, where s/he proposes a defining semantic feature for 'critical success factor'. The proposal is expressed with deontic modality, which implies external knowledge[10] of the obligatory property of 'critical success factor'.

After S1's turn, S3 suggests that S1's turn could be interpreted as a proposal for the content of a strategic goal. S1, however, refuses this suggestion and corrects that what s/he is suggesting is a 'critical success factor'. After that, S2 takes a turn and connects the sayings and their potential meanings to a source text (the contemporary strategy). This turn leads to an interactive and intertextual process of structuring strategy text: the strategists begin to consider the proper place for the 'critical success factor' that has been suggested. As an outcome, the 'satisfaction of inhabitants' is chosen as a critical success factor. In addition, the structure of the strategy text is transformed: what has formerly been in section four is placed in section one.

After all the proposals for revising strategy and restructuring the text, S1 ends up underlining the discursive and contextual meaning of strategy concepts as s/he states that 'these things depend on the way you think of them'. Finally, S1 relates the contextually dependable ways of thinking to a discursive mind of a person ('During a single day at least in a couple of ways'.)

[10] The interpretation of dynamic modality could be plausible as well. This would mean that the obligatory feature of 'measurability' would be internal to this specific strategy. The discussions of the city strategists do not, however, show any signs of such interpretation.

The ending of S1's turn could be seen as framing. In a word, s/he tells that what s/he has said is just one possible way of thinking, but there are others as well. Very concretely, the framing activity again highlights the practice of strategizing in city administration as discursive action, where the strategy concepts, their meanings and the practical implications of the text's choices are also negotiable to an individual strategist. Therefore, the language-game of strategizing is truly discursive: the choices made in the strategy text do have several possible meanings even to the strategists themselves.

3.6. Conclusions

In spite of the proliferation of strategy discourse, we know little of this genre. Hence, in this paper we have adopted a genre-based perspective to highlight specific characteristics of these texts as well as of the negotiations involved in the production and consumption of these texts. We believe that this analysis opens up a new line of inquiry in applied linguistics and brings new theoretically and methodologically grounded insights into contemporary organization research on strategy.

In particular, our analysis suggests that strategy texts have specific communicative purposes that structure these documents. Interestingly, the strategy document is educative in nature. This is seen especially in the use of educational metatext about the core concepts of strategy work. In addition, the text is self-legitimative; it justifies its own existence as it explains to the readers what a strategy is and why it is important. Granted that strategy work devours a lot of resources, a considerable amount of the working time of highly paid officials, for example, this kind of legitimation is of course motivated.

The basic or general communicative purpose of strategies could be summarized as 'to guide future action.' This goal shows up in the strategy of the City of Lahti especially in the form of future-oriented talk. A noteworthy feature in future-talk seems to be, however, its bland timelessness: expressions that are in the present tense in the surface structure often indicate actions taking place in the future.

Strategy texts are also a means to create positive identity. In this sense, the promotional features in the text may be interpreted as fostering affiliation and building a common positive social identity in Lahti society as a whole. For example, subjects and the qualities attached to them invite inhabitants to identify with the reference of the subject. Also, the promotional elements found in text suggest that another important purpose is to promote the city. Promotionality is also tied to a hypothetical reader of the text: the readers are obviously not only city administrators who need strategy in their work but various other stakeholders as well.

Looked at from a lexico-grammatical perspective, the voice and authority in the strategy text suggest that the city council as the producer of strategy works with social categories discursively. In passive voice sentences, the action is constructed as a joint effort or a corporate act of the city administration and its various municipal spheres. Moreover, as the passives foreground the themes and background the agents, the aspects mentioned are constructed as happening inevitably and in spite of the actors. In active voice sentences, on the other hand, the subjects 'city' and 'Lahti' are often metonymic expressions, standing for the legal entity of the city. Hence, the city council acquires authority through metonymic interpretation.

In the second part of our analysis, we illustrated the negotiation of meanings in the meeting talk of the city strategists. The conversation shows interestingly that strategic planning is a discursive process: it consists of negotiations over text, and its

communicative goal is to transform text and even to decide what to write down in strategy. This interpretation of text-based strategy work supports our basic claim that strategy genre is by its very nature definitional. In addition to strategy concepts, the definitional nature of the strategy becomes visible in the text's abundant use of statements and phrases that leave room for different understandings.

Our analysis showed that strategy meetings are venues for both interpreting strategy text and producing new text that is based on previous texts. Thus, the textual choices provide a framework for what is going on in face-to-face interaction. The intertextual and intersubjective meaning negotiations also highlight the contextuality of strategy and especially the contextuality of the key strategy concepts. In the practice of strategizing, the important task of the strategists seems to be to give contextual sense to concepts.

We believe that this analysis makes contributions to two literatures. First and foremost, to our knowledge, this is a first systematic discursive analysis of a strategy text and its role in strategizing. Thus our analysis opens up a new field of inquiry for discourse analysts, which is long over due. Importantly, this article also provides a framework for conducting such analysis. In particular, we point out that such analysis can and should cover aspects related to genre and intertextuality in the negotiation of meaning.

Second, this discursive analysis of a strategy text also contributes to the discussions of organizational scholars about the role of discourse in strategizing. In particular, we have shown in explicit terms the central role of texts such as official strategy documents in the praxis of strategizing (Hendry, 2000; Whittington, 2006). We believe that this analysis thus complements the previous analyses that have examined the role of language in more sociological – and usually abstract – terms, often without specifying its specific characteristics and effects. In this sense, this analysis has both theoretical and methodological implications for this emerging field, which studies strategy from a discursive perspective.

We feel that our analysis has also raised new questions that should be examined in future research. For example, the research on professional and institutional genres might elaborate further on the linkage between face-to-face-interaction and text. More specifically, our approach suggests questions about the construction and use of knowledge in the chain of spoken and written genres in organizations. On the basis of our analysis, we believe that making sense of organizational activities in general calls for research settings where the linguistic nature of institutional processes is understood and operationalized.

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Endnote

Transcription conventions for chapter 3.5.2.

[	point of overlap onset
]	an utterance or utterance part terminates vis-à-vis another elapsed time in silence by tenth of seconds
(.)	a tiny gap within or between utterances
::	prolongation
WORD	loud sounds relative to the surrounding talk
°	quiet sounds relative to the surrounding talk
hhh	outbreath
.hhh	inbreath
wohhrd	h's within a word indicate breathiness
-	cut-off
(( ))	transcribers' descriptions in addition to transcriptions

4 AUTHORING STRATEGY: RHETORICAL TACTICS IN STRATEGY FORMULATION[11]

4.1. Introduction

In recent years, we have seen growing interest in the activities and practices that constitute strategies and strategizing (Jarzabkowski, Balogun and Seidl, 2007; Jarzabkowski, 2008; Whittington, 2006; Vaara and Whittington, 2012). Among other things, scholars have focused attention on the role of language in strategizing (Knights and Morgan, 1991, 1995; Phillips, Sewell, and Jaynes, 2008; Samra-Fredericks, 2003, 2005; Westley, 1990). This has helped us to understand how discourses enable and constrain strategy (Knights and Morgan, 1991), how strategizing develops in social interaction and conversations (Samra-Fredericks, 2004; Westley, 1990; Jarzabkowski and Spee, 2011), and how discursive practices may impede or promote participation in strategy work (Laine and Vaara, 2007; Mantere and Vaara, 2008). However, with few exceptions (Samra-Fredericks, 2003), little is known of the micro-level rhetorical tactics used when strategies are formulated in organizations. In particular, we do not fully understand how influence is exercised or how agency is constructed in strategy formulation.

To partly bridge this gap, this study focuses on the rhetorical practices through which strategic plans are authored in strategy formulation meetings. In our analysis, we draw from of New Rhetoric (Perelman and Olbrechts-Tyteca, 1958, Suddaby and Greenwood, 2005), to be able to focus on the various forms persuasion and convincing. However, rather than conducting linguistic analysis per se, we concentrate on the use of rhetorical tactics as an inherent part of strategic practices and strategy processes. Our main objective is to develop a framework that elucidates the rhetorical tactics through which strategic plans are crafted, authority is constructed, and influence exercised in strategic planning.

In this paper, we report findings from an ethnographic study of strategic planning in a Nordic city organization. We followed the City's strategic planning activities real time between 2006 and 2011 and focused on the naturally occurring conversations in formal and informal meetings in which strategy was formulated. By drawing on extensive observation, interview, and documentary material, we identified frequently used rhetorical tactics and then used textual examples to illustrate and further elaborate on these tactics. As a result of our abductive (Wodak, 2004; Van Maanen, Sodersen, and Mitchell, 2007) analysis, we identified three types of tactics: positioning (mobilization of frameworks and definition of concepts), argumentation (instrumental rationalization, moralization, cosmology and exemplification) and commitment (consensus and autopoiesis). This led us to develop a model of the rhetorical that helps to better understand how authority is constructed and influence exercised in strategy formation.

Our findings elucidate the micro-level rhetorical tactics through which strategy texts are authored in strategic planning meetings. By so doing, this analysis vividly illustrates that strategy formation is much more rationalistic argumentation, but builds on the combination of a number of rhetorical tactics. This study also adds to our understanding of agency in strategy processes by spelling out a context-specific view that elucidates how power is embedded in the minutiae of meetings and how actors exercise influence in and through a number of subtle rhetorical tactics – that easily pass unnoticed in more conventional analysis. Essential in this view is the ability to

[11] This essay is written with professor Eero Vaara, Hanken School of Economics.

draw on existing strategy discourse and contribute to its situation-specific formation. Thus, this analysis provides a micro-level perspective on agency, which complements prior research on participation, resistance and agency in strategy formation. By so doing, this analysis adds to practice and discourse-based analyses of strategy and opens up new avenues in studies of agency in strategy.

4.2. Theoretical background

4.2.1. Discourse as a constitutive part of strategy

A number of studies have focused on the processes through which strategies are formulated in organizations, including strategy studies as well as practice-based analyses. From the 1970s onwards researchers have focused attention on the social processes in which strategies are actually realized (Chakravarthy and Doz, 1992; Mintzberg, 1978; Nutt, 1987; Pettigrew 1973, 1992). Scholars have argued that strategies do not always result from planned or formulated strategies, but through bottom-up (Burgelman, 1983) or emergent (Mintzberg and Waters, 1985) processes. According to this view, various organizational members participate in the construction of strategy through a myriad of organizational interactions (Bourgeois and Brodwin, 1984; Burgelman, 1983; Floyd and Lane 2000; Westley, 1990; Wooldridge, Schmidt, and Floyd, 2008).

Some of these process studies have highlighted the role of communication in strategy processes (Ford and Ford, 1995; Gioia and Chittipeddi, 1991; Green, 2004; Green, Li, and Nohria, 2009; Heracleous and Barrett, 2001; Nag, Corley, and Gioia, 2007). In particular, studies of sensemaking have provided insights into the meaning-making processes of strategic actors (Balogun & Johnson, 2004, 2005; Gioia & Chittipeddi, 1991; Gioia & Thomas, 1996; Maitlis & Lawrence, 2005, 2007; Mantere, Schildt & Sillince, 2012; Nag, Corley, & Gioia, 2007; Rouleau, 2005; Rouleau & Balogun, 2011). These analyses have pointed out that by giving sense to organizational reality, actors influence how strategic processes unfold. For instance, Dutton and Duncan (1987) identified three critical stages in reaching consensus around an issue: activation, urgency and feasibility. Rouleau (2005) analyzed the micro-level sensemaking and sensegiving practices through which middle managers interpreted and sold strategic change. Maitlis and Lawrence (2007) found that sensegiving was enabled both by the discursive abilities to articulate persuasive accounts of the world and by process facilitators such as organizational routines, practices, and performance. Altogether, the sensemaking literature has elucidated the way in which people construct inter-subjective reality as part of strategy processes and strategic change. However, these analyses have not elaborated on the discursive and rhetorical practices of strategy formation processes per se.

As part of a more general 'practice turn' in social sciences (Orlikowski, 2000; Schatzki, Knorr-Cetina, and von Savigny, 2001), we have seen growing interest in the detailed practices and activities of strategy (Jarzabkowski, 2008; Whittington, 1993; Vaara and Whittington, 2012). In this view, strategy is more than just a property of organizations; it is something that people do (Jarzabkowski, 2005; Whittington, 2006). Strategy is seen as situated activity that both shapes and is shaped by the society within which it occurs (Whittington, 2006). 'Practice' in strategy refers both to the situated doings of the individual human beings and to the different socially defined practices which the individuals draw from in their strategizing (Whittington, 2006). Recent strategy-as-practice studies have highlighted the complexity of organizational strategic planning. For example, Jarzabkowski (2008) examined through structuration theory how powerful managers deliberately manipulate action and institutional properties, how

actors may be constrained by or may mobilize existing institutional structures, how institutional barriers such as a belief in existing strategies and their associated meanings may prevent change, how administrative procedures may enable strategizing, and finally how strategies may be implemented without change initiatives. Jarzabkowski and Seidl (2008) provided a rare analysis of strategy meetings where they illustrated the importance of these conspicuous events in strategic planning. They focused on how various meeting practices contribute to stabilizing and destabilizing of strategic orientations. However, they did not examine the micro-level conversations through which strategies were produced.

Parallel to or as a part of this strategy-as-practice stream, researchers have become interested in discursive perspectives on strategy. Scholars have shown how strategy is an ideologically-laden discourse (Knights and Morgan, 1991). Others have examined strategy as a narrative emphasizing the fictive nature of strategy narratives (Barry and Elmes, 1997; Dunford and Jones, 2000). Still others have focused on discursive practices in strategizing. For instance, Hardy, Palmer and Phillips (2000) examined how the use of specific discursive resources involves circuits of activity, performativity, and connectivity. Heracleous and Barrett (2001) in turn examined how language shapes change processes through its influence on actors' interpretations and actions. Laine and Vaara (2007) studied how subjectivity is linked with the mobilization of strategy discourse, and Mantere and Vaara (2008) how specific discursive practices may promote or impede participation in strategy. Most importantly for our purposes, Samra-Fredericks (2003, 2004, 2005) provides a rare example of micro-level analysis of strategy talk. She demonstrated that it is through mundane speech acts and various micro-level practices that particular ideas are promoted and others downplayed, and specific voices heard or marginalized. In one of her studies (Samra-Fredericks, 2003), she focused on rhetorical skills that strategists use for persuasion – and to construct subjectivity as strategists. These include the ability to speak forms of knowledge, mitigate and observe the protocols of human interaction, question and query, display appropriate emotion, deploy metaphors, and put history to 'work.' Jarzabkowski and Sillince (2007) in turn examined the micro practices through which top managers influence employee commitment. They demonstrated that rhetorical influences over commitment to multiple goals are associated with the historical context for multiple goals, the degree to which top managers' rhetoric instantiates a change in that context, and the internal consistency of the rhetorical tactics used. In another study, Jarzabkowski, Sillince and Shaw (2010) underscored the role of ambiguity in strategy rhetoric. Spee and Jarzabkowski (2011) in turn elaborated on the recursive interplay between planning and talk and how that leads to shared interpretations.

Building on these advances, we wish to add to our understanding of the micro-level rhetorical tactics used in strategy formation processes. In particular, we focus on how actors create authority positions in strategy conversations and the ways in which they argue for or against specific ideas. Hence, we will now draw from rhetorical theory that can help to uncover such tactics.

4.2.2. Rhetoric in strategy research

Rhetoric means the ability to use discourse to inform, persuade, or motivate particular audiences in specific situations. The classical Aristotelian rhetoric has focused on the speaker's argumentation (logos, pathos, ethos) (Aristotle, 1954), but the so-called New Rhetoric has shifted from simple rhetorical techniques to more complex forms of discursive persuasion and convincing (Cheney et al., 2004; Green, 2004; Perelman and Olbrechts-Tyteca, 1969). This approach to rhetoric has led researchers to focus on argumentation's inter-subjective realm that includes values, attitudes and motivations instead of just purely focusing on objective realm of facts and propositions. In our

analysis of rhetorical tactics in strategy formulation, we make use of the rhetorical analysis by drawing from the key techniques (Perelman, 1977) through which participants seek justification for their claims. Such tactics have been studied in recent analysis of institutionalization and legitimation (Green, 2004; Green, Li, and Nohria, 2009; Suddaby & Greenwood, 2005). In particular, Suddaby and Greenwood (2005) identified the following kinds of strategies for the legitimation of radical institutional change: ontological (rhetoric based on premises on what can or cannot exist or co-exist), historical (appeals to history and tradition), teleological (divine purpose or final cause), cosmological (emphasis on inevitability), and value-based theorizations (appeals to wider belief systems). Vaara and Tienari (2008) took a critical discursive perspective on shutdown decisions. They identified four types of strategy used for legitimation and delegitimation: authorization (authority construction), rationalization (rationale), moralization (moral basis), and narrativization (construction of a compelling plot). In another study, Golant and Sillince (2007) provided a narrative perspective where the construction of legitimacy is dependent on both the persuasiveness of organizational storytelling and on the realization of a taken-for-granted narrative structure. As noted above, rhetorical studies of strategy formulation have been scarce, but especially the studies of Samra-Fredericks (2003) and Jarzabkowski and Sillince (2007) underscore the role of rhetoric in strategy processes.

Rhetorical tactics are greatly affected by the social settings in which discussions take place. Thus, it is useful to draw from the insights of ethnomethodology and Conversation Analysis that places discourse in context. Conversation Analysis (Sachs, Schegloff, Jefferson 1974, Schegloff, Jefferson, Sacks 1977, Heritage 1984) maps out the rules and structural organizations of social interaction. The main idea of CA is that social interactions follow systematic codes of behavior. For instance, the construction of authority or rights to speak is key to exercising influence. Essential in this method is the observation that the relationship between the form and the meaning of linguistic activity is flexible because in the end, the meaning of each speech act becomes apparent in the reasoning of a recipient, in the synergy of expression and context. This notion has directed CA researchers' attention towards the examination of categorizations that people create and maintain in the interaction, instead of focusing on lexical (word-to-word) or clausal meanings. Although studying informal interaction developed the rules of CA, there is an established body of research focusing on institutional talk (Drew & Heritage 1992, Drew & Sorjonen 1997, Heritage 1997, Arminen, 2000); such as strategic planning in our case. According to this view, what is seen as appropriate and useful is specific to the institutionalized practices of the setting in question. Thus, when studying strategy formation in and through strategic planning meetings, the rhetorical tactics used and their impact is specific to the practice of strategic planning. In the strategy context, Samra-Fredericks (2005, 2010) has, in particular, underscored the usefulness of CA to understand the everyday discursive actions of strategists and other organizational members.

Hence, to understand how influence is exercised in strategic planning meetings, it is useful to study the rhetorical tactics used to promote or resist specific ideas. Such analysis should not, however, be limited to most obvious rational arguments, but also focus attention on the ways in which authority is constructed in and through these tactics. In fact, as pointed out by Benoit-Barné and Cooren (2009), the creating of texts – in our case strategic plans – is authoring in two senses: the very production of the texts, but at the same time the creation of authority positions that allow one to exercise influence. This leads us to formulate our research questions as follows: (1) What kinds of rhetorical tactics do managers use in strategic planning meetings? (2) How is agency enabled and constrained by these tactics?

4.3. Methodology

4.3.1. Case and context

Our analysis is based on an ethnographic study of strategic planning in a Nordic City Organization. We were fortunate to get full access to the organization and observe all of their strategic activities, including the formal and informal strategic planning meetings. We followed a full strategic planning cycles in between 2006 and 2011 real-time, and gathered extensive material about strategy work in formal and informal settings. This research design provided us with an opportunity to examine naturally occurring talk (Potter and Wetherell, 1987) in strategy work, which is crucial for an in-depth analysis of strategic planning meetings. In this respect our analysis differs from the previous research on discourse in strategy that has only very rarely focused on real-time conversations (for exceptions see Samra-Fredericks, 2003; Spee & Jarzabkowski, 2011).

Our case involved extensive discussions around strategy, which enabled us to examine a full variety of rhetorical tactics used in strategic planning meetings. Furthermore, the case was characterized by continuous debates around appropriate strategy, which allowed us to examine the role of key actors in these processes and the construction of authority and power relations. Although this case has obvious unique features, we believe that it can lead to analytical generalizations: findings which upon due reflection can be generalized beyond this particular case (Tsoukas, 1989).

We followed real-time the strategic planning activities of the key decision-makers between 2006 and 2011. This included three full strategic planning cycles in 2006-2007, 2008-2009 and 2010-2011. The central issue in this period was the restructuring of the services provided by the City. From the beginning of 2006 onwards, the new Mayor and other protagonists called for restructuring to balance the budget of the City. A key idea was to limit and focus the service offerings of the City and to encourage people to take more responsibility for their own well-being – including health services. This was coined in the concept of "individual responsibility." The antagonists challenged these ideas for example on the grounds of equality and provided other alternatives. Although they could significantly influence the discussions and plans, the end result was a fundamental reorganization of the City's services. What was crucial in this process was the rhetorical ability of the protagonists to create a language to make sense of the changes and to justify them. Interestingly, all this was closely linked with a systematic approach to strategic planning introduced by top management.

We had full access to these strategic planning activities based on an agreement to protect the identity of specific people. Accordingly, we participated as observers in all kinds of meetings, met with and interviewed people involved, and otherwise followed strategic planning and related activities on site. This allowed us to construct an extensive database, but also to establish contacts with the key people, which proved to be very important for the clarification of specific issues, verification of our findings, and other forms of feedback.

4.3.2. Data sources

Our data comprise extensive observation, interview, and documentary material. First, our primary data consist of strategy conversations. Most importantly, we participated in all of the city's executive group meetings where the strategy draft was formulated to capture the interactions and behavior of individuals. In these meetings the participants of the executive group discussed about gathered information in order to understand the situation where strategy was decided; translated these interpretations into strategic

initiatives; adjusted, diluted, and revised strategic initiatives to overcome resistance and to make the strategy more acceptable; and developed more detailed plans that would support the strategy implementation. Altogether we observed 34 strategic planning meetings of the executive group. These meetings lasted rom 30 minutes to two-day seminars. All but one of them were fully recorded and transcribed. In the non-recorded meeting, we took careful notes.

Second, we interviewed the members of executive group and those involved in the executive group's work during each strategic planning cycle. In practice, these interviews covered all the key participants in the strategic planning. This resulted in 26 recorded interviews that lasted from 45 minutes to 2 hours. We followed a 'storytelling' approach (Czarniawska, 2004) with the use of a semi-structured interview guide. These interviews were crucial to our understanding of the context and subtext of the actual conversations, but also to comprehension of how the participants had experienced specific events in strategy work. All of the interviews were later fully transcribed.

Third, we obtained all available documented material including memos, presentations, implementation reports, and drafts of the strategy document. Altogether, this material comprised more than XX documents. Although our analysis focused on the planning of the official strategy document and its various versions, it was also important to be able to examine the linkages to other documents to develop a fuller understanding of where specific strategic ideas and arguments originated from and how ideas and texts were reinterpreted in new contexts.

4.3.3. Data analysis and coding

Our analysis proceeded in 'abductive' (Van Maanen et al., 2007) manner involving development of specific theoretical ideas alongside increasingly accurate empirical analysis of the strategy conversations. First, we started with detailed examination of three selected meetings. Through a careful analysis of rhetoric in conversation, we identified a variety of rhetorical tactics, that is ways of using language persuade and/or convince others, and observed how they were used by the participants to promote or resist specific ideas and to construct authority positions.

Second, we proceeded with a systematic analysis of all the meeting and interview material to be able to map out the central rhetorical tactics used. At this stage, we focused on all of the 34 meetings that had played a significant role in the formulation of the City's strategy. This was a labor-intensive process that led to a coding scheme that helped us to systematically distinguish and examine frequently occurring rhetorical tactics that played a central role in the strategic planning meetings. In this analysis, we combined insights from rhetorical studies (e.g., Suddaby and Greenwood, 2005;Vaara et al., 2006) as well as CA (e.g., Samra-Fredericks, 2003, 2005) to identify strategy-specific rhetorical tactics. We were not looking for any tactics per se, but cases where a use of a rhetorical tactic had a major influence on the course of discussion between the protagonists and antagonists of change.

After several iterations, we came up with a categorization that distinguished between the following rhetorical tactics: positioning (mobilization of frameworks and definition of concepts), argumentation (instrumental rationalization, moralization, cosmology and exemplification) and commitment (consensus and autopoiesis). This coding scheme was not exclusive; for example utterances could simultaneously involve several tactics. Following the example of similar explorative studies, we checked inter-coder reliability. A coding of 30 % of the meetings resulted in inter-coder agreement above 90 %, which can be seen as more than satisfactory. Table 3 below provides a summary of the frequency of these tactics.

Table 3 Frequency of rhetorical tactics in strategy formulation

Rhetorical tactic	Total amount of codes occured	Total average occurance - all meetings (times)	Total % of all rhetorical tactics identified
Mobilization of frameworks	1367	40.21	24.4%
Definition	994	29.24	17.7%
Instrumental rationalization	391	11.50	7.0%
Moralization	226	6.65	4.0%
Cosmology	774	22.76	13.8%
Exemplification	1143	33.62	20.4%
Consensus	463	13.62	8.3%
Autopoiesis	251	7.38	4.5%
			100.0%
Meetings total Codes Total	34 5609		

Third, we then examined specific extracts and quotes in more detail to be able to highlight particular aspects of the rhetorical tactics. We chose these extracts and quotes on the basis of their illustrative power – they aim at sensitizing the reader to the rhetorical practices of strategizing that have not been recognized so far and at symbolizing a range of influencing that take place in strategic planning. This allowed us to develop a more nuanced understanding of the rhetorical tactics and how they simultaneously led to influence and a construction of authority position.

This kind of analysis involves methodological challenges. Rhetorical tactics are ontologically and epistemologically complicated objects to study and capture. In particular, it is challenging to place specific linguistic findings in broader context and to establish patterns in strategy conversations. This analysis is necessarily interpretative and subjective, which can lead to one-sided representations and conclusions. However, our triangulation strategy – a constant effort to compare the evidence from several sources – helped to deal with these challenges. Also, it should be noted that all this analysis was challenging language-wise: the actual analysis was conducted in the original language, but the main results were translated into English when comparing the findings. Although meanings and nuances were unavoidably lost in such translations, the richness of the material allowed us to deal with specific problems by constant comparison of several examples.

4.4. Findings

In the following, we elaborate on the most central rhetorical tactics used. They include tactics of positioning (knowledge and definition), argumentation (instrumental rationalization, moralization, cosmology and exemplification) and commitment (consensus and autopoiesis). Table 4 below provides a summary and examples of these tactics.

Table 4 Rhetorical tactics in strategy formulation

Rhetorical tactic		Linguistic characteristics	Meetings	Interviews	Texts	Effects
Tactics of positioning	Mobilization of frameworks	Reference to frameworks and theories (e.g. Balanced Scorecard, Hoshin Kanri, SWOT)	Extract 1 "It has taken years to learn this **BSC**, you know, to really learn to use different **perspectives, goals and measures**. But I think during the last period we got the strategy into a nice shape. Of course there are always different "isms" but I think it is better first learn how to genuinely manage with a certain kind of strategy tool, like in our case with **BSC**, and then it is easier to change the tool when we know how to do strategy."	Quote 1 "If you do a **SWOT** analysis the other way round it is very obtrusive. In **TOWS** when you take a look at the external 'threats' and 'opportunities,' you really have only a few strengths and a whole lot of weaknesses. In fact, most of those strengths that you think are great, well, those don't really have much impact. E.g. here we tried to write that natural environment is the key strength in the City. It could be an opportunity but if the natural environment brought the growth for the City, it would have done it already."	Sample 1 "Strategic goals, critical success factors, evaluation criteria and measures have been combined in Scorecards, which examine the city organization's operation and its development through the four strategic perspectives presented above." *The official strategic plan*	The frameworks that were mobilized (especially the BSC) had a fundamental effect on the nature and scope of the ensuing discussion.
	Definition	References to the meaning of specific concepts	Extract 3 "This 'attractive area' means, you know, it is a growth message for the whole organization. And it means that everyone has to articulate ways to contribute to the growth. This concerns everyone."	Quote 3 "The goal of growth was the hardest one. It required extensive persuasion that people realized that if the City won't grow fast enough, this City would decline. Although there has been more population growth lately, this is not enough considering that the +65 year old population won't consume and create markets and	Sample 3 "Strategic goal A: The City is growing and an attractive city The key challenges in reaching this goal are the restructuration of the businesses and the growth in the numbers of employment, the protection of the availability of the work force, and the improvement of the City's image	The definition of key concepts was often a major struggle and had a fundamental impact on the scope and content of the ensuing discussion.

				jobs. It required an enormous amount of analytical work to prove that the City must grow at least 1% per year to survive."	and competitiveness in relation to the other big cities. […] The City targets over 1% yearly increase in population." *The official strategic plan*	
Tactics of argumentation	Instrumental rationalization	Means-end rationality; in our case especially financial and economic arguments	Extract 4 "When you think about that, at the moment in the specialist medical care already 15% of patients use 85% of the money. And this was a study that was done a few years ago so if they did it now it would probably be something like 10% using 90% of the money. So **this means that an individual patient has a 200 000 euro yearly budget, which extends his life by three months.** And this is how it goes. There isn't any weighing of needs. It just goes. And if some medical technique has been accepted in Nordic markets, there isn't any deliberation after that. And if you compare this with Smith's department, which takes care of the whole age-class. So **how many teachers could you hire with 200 000 euros?"**	Quote 4 "Well, the **Euro is the best consultant** when the amount of a loan is increasing and tax income and state grants are not sufficient for producing the services that the law demands and the Parliament requires. And these (cuts) must be done. It is, you know, pure logic."	Sample 4 "One of the central internal challenges facing the City is **the need to balance the city's economy**. This will require **prioritisation** of services, followed by **cutbacks** and the addition of inhabitants' **individual responsibility** in the financing of their services." *The official strategic plan*	Means-end rationality that was based on calculating the costs and benefits of strategic initiatives became an increasingly important way of arguing for specific choices; this was the case especially for the protagonists of change.
	Moralization	Reference to shared values or concerns about the morality of	Extract 5 "S1: The ER is our core duty. It is also in the US so that those who can't afford health insurance,	Quote 5 **"It has to start out primarily from there that everyone takes care of themselves,**	Sample 5 "Promoting wellbeing requires a new way of thinking. **The residents together with their**	Moral concerns were used to promote or and especially to resist change.

		initiatives	they have the right to go to the hospital ER. And the ER can't turn them down. S2: Well, that's basic security. S1: Yes S2: That's right. S1: And I think **this is the cornerstone**. **That is what the public authorities have to take care of. That is what we can't cut.** And everything that goes beyond this is something that we can discuss."	**about their well-being.** And then when there are not enough people working in the health sector, then we have to go back to that time when families took care of their members and it included also grandparents and grandchildren."	**communities will take a larger responsibility of their wellbeing**." *The official strategy document*	
	Cosmology	Naturalization of a certain state of affairs; use of specific modal verbs and future tense	Extract 6 "Because our population pyramid **is like it is**, our working aged population decreases. So **we are forced** to do something so that we can keep this welfare society."	<u>Quote 6</u> "We want to medicate our finances. To do that, we **must** shift responsibility to the people themselves, meaning that the City **will finance fewer** services in the future than today."	<u>Sample 6</u> "The successful cities differ from regressive ones in the talent to attract working aged people. Growth in urban migration is **the only way** to secure the availability of the work force for the businesses and public sector." *The official strategy document*	Inevitability arguments were powerful means to promote specific initiatives and ideas.
	Exemplification	Stories used as examples of what could happen; metaphorical expressions exemplifying future choices.	Extract 8 "What are those core duties? If they are **the maintaining of ski tracks, and, you know, pampering people who are in their active age** and everything possible. Well, somehow we should find the focus to what do	Quote 8 "This broad strategy is about different issues than what is **the color of a park bench**. But still, some tend to focus on those issues, which belong to an operational level."	Sample 8 n/a	Figurative descriptions of abstract strategic ideas proved to be powerful means to persuade and convince.

			we mean by focusing on core duties."			
Tactics of commitment	Consensus	Creation of a sense of shared understanding ; use of pronouns such as 'we' or words such as 'everyone' or 'all'	Extract 9 "**We** have to spell out what **we** mean by it. If **we** won't reach **shared understanding** and **we** say well-being, basic social service, or basic social security and leave it depending on the use of one's own discretion and everyone then thinks it a bit differently. Well then **we** won't have any strategic line, won't **we**?"	Quote 9 "So now **we** have thought that it should be so that when **we** have the critical success factors in City's strategy, those are the ones, word for word that **we** draw on until the next strategy. Of course **we** can express our discomfort if **we** think that this is not well phrased but **we**'ll use it anyway because otherwise it will bring distrust to the organization. And then if **we** are not able to express it with similar words in every place, it begins to shake."	Sample 9 "The strategic directives are followed in **all** operations and in the development of the city." *The official strategy document*	Articulation of shared understanding was an important means to secure commitment to the initiatives or ideas in question.
	Autopoiesis	Repetition of key ideas as a form of autocommu-nication	Extract 10 "S1: So when we aim at increasing **individual responsibility** it means **individual responsibility** in buying the services, doesn't it? And financing those services? S2: Yes, exactly. That is one way."	Quote 10 "Well, when we discussed the strategy with the politicians, they didn't swallow it at first. They were stuck with the Nordic model. But **now when we have exercised this over and over again**, well, now it seems that the strategy looks more like what the operative directors suggested few years ago."	Sample 10 "Strategic goal no. 1 The City will focus on its core duties and the resident's activity to take **individual responsibility** will be increased." *The official strategy document*	Autocommunicative repetition resulted in the legitimation and naturalization of key ideas such as 'individual responsibility.'

4.4.1. Tactics of Positioning

The participants used various tactics of positioning especially in the first meetings of the strategic planning cycle and in the beginning of the meetings. In particular, they mobilized specific frameworks to steer the cause of discussion and focused on definition of the meaning of concepts and goals.

4.4.1.1. Mobilization of frameworks.

Strategy conversations were structured by strategic discourse in terms of the central role of specific frameworks and concepts. Those who mastered this strategy lexicon found themselves in a privileged position in the meetings, while those who did not were at times effectively excluded from exercising influence. In our case, the meetings were often characterized by extensive discussion where especially the protagonists, but also the antagonists mobilized frameworks to promote their ideas and interests. This was the case with the Balanced Scorecard that was eventually used to structure the strategic plans of our observation period. In fact, the protagonists were frequently able to to position themselves as key strategists and steer the discussions toward financial and economic issues by the mobilization of the BSC. In the following example from one of the first meetings, Speaker 1 (S1) and S2 promoted the use of the BSC and by so doing emphasized prioritization of specific goals (financial and economic issues):

> S1: We should be able to get people to comprehend as to what our strategy precisely is. So that we don't end up in a situation in which someone discovers that there are all the nice things in our strategy and then when we see what they've done, the whole idea has flipped a somersault. So this has to be done with the Balanced Scorecard, and those cards need to be prioritized.
>
> S2: Exactly. And one way of doing that is to focus on core operations. And we need to identify those core operations because if we go further and further down in the organization, less and less people have any idea of the big picture. The more and more they think that it is exactly the core operation what they do day-by-day.

At times, the antagonists could also challenge this kind of authority basis. The following is a rare example where a Department Head (S2) positioned himself as someone who knows how strategic planning should proceed by reference to Hoshin Kanri (a model behind the BSC):

> S1: Well okay this goes now too [far]. I should probably proceed with smaller steps.
>
> S2: Have you read the theory of Hoshin Kanri
>
> S1: No.
>
> S2: It is that that you are trying to do there. For that, there is this kind of particular technique and that is called Hoshin Kanri and BSC is derived from Hoshin Kanri.
>
> S1: No no I haven't read that theory.
>
> S2: Well I, you know, I have nothing against that frame. But in real life I think that we would practice that this general picture in the departments. And because we have our own strategies, we would exercise those this year and then we would look at this. And if we want a stronger hold on this with your logic, then we would need to bring more that tool or that theory into this.

In this example, S2 assumed a strong authority position based on the use of strategic vocabulary as a knowledge tactic. By so doing, S2 challenged the expertise and authority of S1, the chair of the meeting, which prevented the chair from pursuing the initial idea of moving more directly toward the prioritization of financial concerns. In the discussion that followed, S2 could bring in many more issues and highlight the specific concerns of his department.

Over time, the discussions about the frameworks became increasingly sophisticated. The following is an example from the end of the observation period where both a protagonist (S1) and antagonist (S2) argued for a specific interpretation of the BSC that would allow them to lead the discussion:

> S1: We obviously have a problem with this BSC model. Last time when we did this, we did this according to so-called visually Balanced Scorecard. And if we look at an example, "the sustainable development" goal could be all the way on left under the heading "Vigorousness and urban structure." And to be honest, it belongs there.
>
> S2: But if we examine this visually, it is the most simplified goals that are likely the most effective ones to steer our operation. And the economic and human resource goals are the most simplified ones compared to this heck of a long list of good issues in these other goals. So the point in this BSC model is to find a balance. But I could equally well ask what a strategy that pursues balance is. Isn't strategy about finding a sharp strategic cuspis and its emphasis!"

This example reveals how the protagonist of a particular way of using BSC and the antagonist of this view debated the framework used. In fact, this discussion was a turning point in the conversation in which S2 succeeded to shift focus from BSC-oriented planning toward a broader discussion of the very role of the City in providing services to its inhabitants.

4.4.1.2. Definition of concepts and goals.

Defining strategy concepts and strategic goals was a key part of the conversations. In fact, especially the first the strategy meetings of the observation period were characterized by extensive discussion about the definition of specific concepts. This included key concepts such as "critical success factor," "core operation," "objective" and "goal." Furthermore, a great deal of attention was focused on the definition of new strategic ideas and slogans. In particular, the idea of "individual responsibility" was extensively debated ever since the beginning of the observation period. The protagonists initially coined the concept to denote a logic according to which the inhabitants should bear more financial and organizational responsibility for the services that used to be provided by the City, but which it no longer could afford to offer. However, the antagonists fought to broaden this idea so that it would also include overall responsibility of the people. The following is an example of a discussion where S1 (antagonist) first challenged the way in which individual responsibility was understood, but then S2 and S3 (protagonists) wanted to reinstate the initial understanding:

> S1: If we write individual responsibility, what is then the responsibility of the city? Individual responsibility in a way wipes that away. Or it will be interpreted that way.
>
> S2: What is this city other than a consortium of inhabitants. I see that in this consortium the inhabitant is responsible. I am irritated that there is always a basic assumption that we are wiping away our responsibilities. As if there was someone or something that takes care of these things without that inhabitants would need to take responsibility.
>
> S3 I guess you would need to rewrite our wellfare society- this contemporary society is, in fact, based on this idea that society takes responsibility away from its inhabitants.
>
> S2: Exactly, and we need to go back to the beginning.

Overall, by defining the meaning of such core concepts and ideas, the participants exercised significant power by paving the way for particular strategic choices and other ideas. In fact, it seemed that these definitions became central means through which both the protagonists and antagonists could pursue their interests.

4.4.2. Tactics of argumentation

The participants also used a variety of tactics of argumentation. These included instrumental rationalization, moralization, cosmology, and exemplification.

4.4.2.1. Instrumental rationalization.

Instrumental rationalization was the use of means-end arguments to promote a specific cause. In the strategic planning meetings, especially the protagonists focused on financial or economic concerns. These arguments dealt with instrumental motivation such as cost cuts, rationalization of work, productivity, and profitability. The following provides an illustrative example of a discussion in which a top manager (S1) used financial arguments to individual responsibility cuts in the City's services:

> S1: If we think about the increasing of inhabitants' individual responsibility, the department of social and health care has the key to influence how the individual responsibility increases in the use of these services. There are no such costs and markets in the any other department. But we can for example charge more. And we have the principle that we ask for more than what the inflation is as long as we reach cost efficiency. And we don't have any service in which we should set the price based on the social principles.
>
> S2: We can set the price more in the cultural and sport services and in the daycare. But not in the schools.
>
> S3: And we have barriers in all pricing.
>
> S1: But if individual responsibility means that inhabitants buy and finance part of those services that the City has provided before from the private markets, and we all agree on that, then we have a clear guideline how to proceed.

In this extract the argumentation concentrated on the financing of services. The manager in question (S1) succeeded in making the point that although specific services may appear financially limited, the total expenditure is significant. This led to a discussion of cost cuts resulting in a strengthening of the protagonists' idea of focus in the City's service offerings. The key issue here is that by so doing the manager succeeded in moving the discussion from the City's operations per se – as had previously often been the focus of strategic discussion – to the financial aspects.

4.4.2.2. Moralization

The rhetorical tactics used also included moral arguments. In this rhetorical tactic, the arguments were based on moral concerns. In our case, the rhetoric of "doing the right thing" was used by the protagonists, especially to refer to the obligations of "balancing the budget" and "not growing the City's debt." However, moral argumentation played an even more crucial role in the antagonists' rhetoric. In particular, the antagonists promoted values such as "joint responsibility" and "community" to create a sense of responsibility when initiatives concerning service cuts were discussed. The following is a typical example where S2 questions the moral basis of reducing the services available for all:

> S1: When we focus on "core operations," this means certainly that the service repertoire is not going to stay the same.
>
> S2: But the city must still take care of its inhabitants who are not fortunate. The sign of every civilized society is that it takes care of the weakest.

These kinds of moralizations proved to be effective means to resist the protagonists' ideas of cost cuts – or at least tune down the most radical changes. Such argumentation could also be based on value hierarchies, that is an understanding that some moral values are more important than others. In our case, those resisting the changes could for instance imply that "taking care of all" would be more important than "short-terms cost savings."

4.4.2.3. Exemplification

Exemplification in terms of metaphors and stories was also a frequently used as argumentative tactic in the strategy discussions (Vaara & Monin, 2010). This tactic was employed especially when dealing with ambiguous and contradictory issues. In the following example, a key manager (S1) is arguing for change based on an imaginary story of increasing demands of the inhabitants:

> S1: Well the question here is that if we start to measure the satisfaction of the residents we should define first what really are those services (that we provide) and then measure the satisfaction of the residents in relation to those. Because this demand of services is indefinite. You know, someone will come up with the suggestion that during Christmas time the City should provide a public Christmas-tree decorator, and on Midsummer day a bonfire burner. So there will be these demands certainly.
>
> S2: Yes there will.
>
> S1: And then when we measure that "Are you satisfied?" "Well there is no Christmas tree decorator so we are not satisfied."
>
> S2: Well that (service) is not our main priority.
>
> S1: Exactly.

In this example, the manager SI is supported by S2. He eventually succeeded in legitimating the idea of reducing the service offerings – even if it meant dissatisfaction on the part of some of the inhabitants. Through these kinds of examples, S1 and few other key decision makers were able to emphasize the "big picture" in the City's strategy formulation, implying focus on the essential services and cuts in others. However, at times the antagonists could also come up with examples such as nightmare scenarios of deteriorating services and increasing inequality and poverty.

4.4.2.4. Cosmology.

There were also powerful arguments that dealt with inevitability (Leonardi, 2008; Spicer & Fleming, 2007; Suddaby & Greenwood, 2005: 55-56; Erkama & Vaara, 2010). This rhetoric frequently justified the need for major changes by references to "forces" and "trends" such as "ageing," "globalization," "financial crisis," "technological development," and "environmental change". This kind of argumentation naturalized a certain state of affairs either as an objective to be reached or an inevitable problem that had to be solved by specific strategic actions. In the following example, the antagonist S1 raises up the issue of retrenchments and argues that the City should do more than is absolutely necessary, which leads to the protagonist S2 to cosmologically argue that there isn't any other choice:

> S1: There are much more to this. The city has a variety of other core services than only those absolutely necessary services.
>
> S2: We must follow a certain kind of hierarchy. When we are in this kind of a tight financial situation, we don't have a choice. We must retrench and increase individual responsibility.

S1: So why haven't we done it yet?

S2: Well, those that are not that important, we have and we must continue to do that.

S1: But we have certain social tradition-

S2: But then we must put these services in certain kind of order!

This kind of cosmological argumentation was effective in building authority for S2 to exercise influence in forcing prioritization of the offered services and naturalizing the strategic choice to increase the inhabitants' individual responsibility.

4.4.3. Tactics of Commitment

Finally, the participants also made significant efforts to create and enforce commitment. This was especially the case with the end of meetings and at the end of the planning cycle when refining the strategic plan. These tactics included consensus building and autopoiesis.

4.4.3.1. Consensus.

Consensus was an implicit aim that tended to structure the conversations. Thus, not unanimity was one of the most central rhetorical means used in the conversations, especially when wrapping up the results of planning sessions and when formulating the ideas and decisions in the official strategic plans. This was the case in the following example in which a key manager calls for commitment behind the proposed ideas:

S1: I wish that we would find that kind of a format to this first card (Scorecard), which everyone would be happy with. Because we have to stand by it. Then this card will be good.

S2: Yes, yes indeed.

S3: This is it.

S2: You're right. This is an important card. And we will defend it and explain what it means.

In this example, after a long discussion, S1 eventually succeeds in building consensus among the people who initially had different views on the changes and their formulation. Characteristically, such tactics often involved pronouns such as 'we' or words such as 'all' or 'everyone' to emphasize the shared nature of these ideas.

4.4.3.2. Autopoiesis.

Finally, strategy conversations were characterized by repetition of strategic initiatives and decisions. An explicit part of such repetition was 'autocommunication' in which issues that had been previously discussed were repeated as an essential part of strategy (Broms & Gahmberg, 1983; Erkama & Vaara, 2010). In our case, this repetition became an important mean to self-legitimate and naturalize the ideas presented earlier and especially the reached consensus. In particular, it was interesting to observe the change in the discussion about "individual responsibility" over time. In the following example, which took place towards the end of our observation, the participants discuss once again about the reformation of the city's service network. This gives S3 an opportunity to refer to the strategic goal to increase inhabitant's responsibility:

> S1: I still think that the key issue is to offer the services through emphasizing and strengthening the individual responsibility of the inhabitants. It would be good to have similar kind of guidelines in these other strategic goals as well. And what comes to this discussion around processes and structures, shouldn't we set stricter targets to this discussion around service network?
>
> S2: Well, it is always tough to find a suitable sentence. We have such a different service providers.
>
> S1: But if we find such a sentence, then the strategy is good.

As noted above, the very idea of individual responsibility was initially heavily debated. When it then became a key part of the strategic plans, this discussion changed in the sense that individual responsibility was frequently referred to, but seldom explicitly discussed. In fact, it became a kind of a 'mantra' or 'an obligatory passage point' (Callon, 1986; Whittle and Mueller, 2010) in the strategy discussions.

4.5. Discussion: A model of rhetorical tactics in strategy formulation

In spite of increasing interest in the role of language in strategy and strategizing (Phillips et al., 2008; Samra-Fredericks, 2003; Westley, 1990), little is known of the micro-level discursive processes and practices in strategy formulation. In particular, there is a paucity of knowledge of how authority is constructed and influence exercised in and through strategic planning meetings. By adopting and developing a rhetorical perspective, we have identified and elaborated on some of the most central rhetorical tactics in strategic planning meetings. Figure 1 below provides a summary of our model.

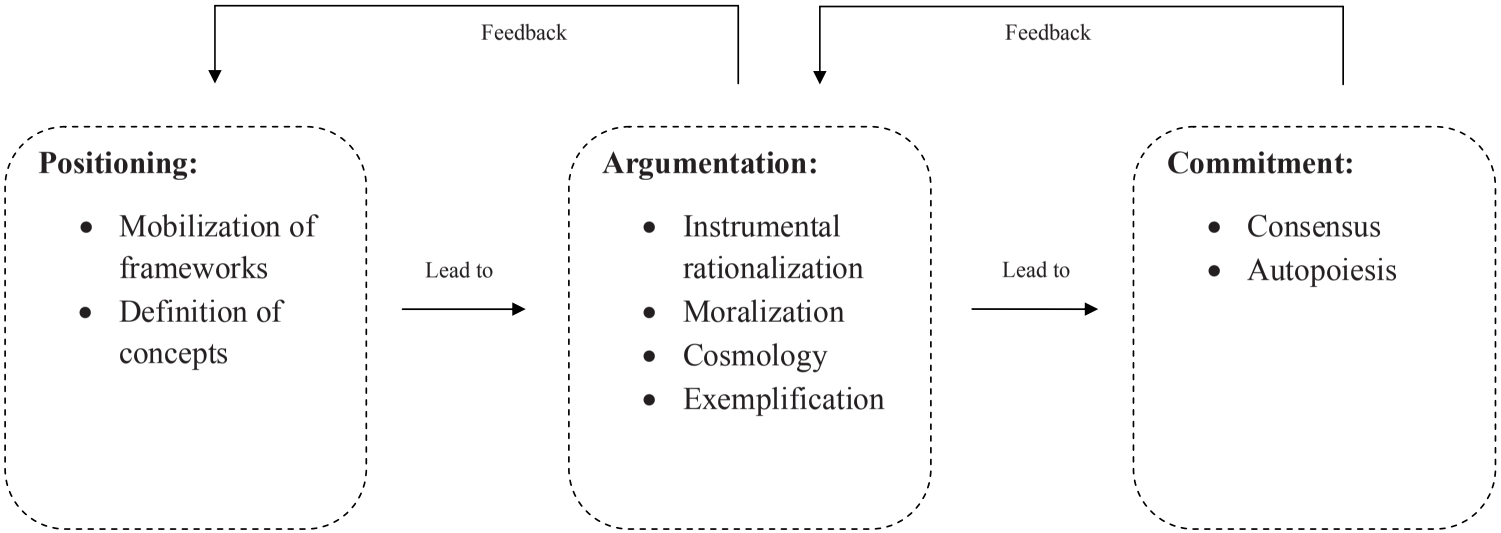

Figure 1 Rhetorical tactics in strategy formulation

First and foremost, our model helps to understand the exercising influence not only involves rational argumentation, but is linked with a number of rhetorical tactics some of which easily pass unnoticed in more conventional analyses of strategy formation. Our model highlights the importance of positioning in the beginning of discussions around specific issues. This positioning is crucial rhetorical activity that frames the ensuing argumentation. As our analysis shows, it comprises both positioning in terms of defining the scope of the discussion by promoting specific frameworks and giving specific sense to core concepts. Importantly, this kind of positioning often involves struggles between the key actors (Kaplan, 2008). Rhetorical argumentation is the central part of discussions, and our analysis highlights the myriad of tactics that may be used for that purpose. While instrumental rationalization plays a key role, moralization is also important. In addition, our analysis also revealed the crucial role of tactics such as cosmology (claims of inevitability) and exemplification in these discussions. Finally, our analysis highlights the importance of commitment that can be achieved by rhetorical means such as consensus and autopoiesis. These tactics are important means to bring closure to discussions about specific issues as well as to enforce commitment to the formulations agreed upon and spelled out. Thus, our model highlights the richness of rhetorical tactics and the variety of ways in which they may be used in strategy formation.

The use of these tactics is closely linked with the structure and dynamics of strategy formation. That is, the processes and meetings have to be structured, and by skillful positioning, managers can greatly affect the outcome – as is the power of agenda setting (Bachrach and Baratz, 1963) and the emphasis on conversational asymmetries in conversation analysis (Drew and Heritage, 47-49). Later on, arguments are needed to persuade and convince, and finally there is a need to create commitment. Our analysis highlights the fact that some managers were more skillful in being able to influence and at times even control the flow of these discussions. However, our material also vividly illustrates how at times any one participant could successfully use these rhetorical tactics and at least occasionally turn out to be a key strategist.

4.6. Conclusion

This study makes three contributions to strategy research. First, this analysis highlights the central role of micro-level rhetorical tactics in strategic planning meetings. It is important to develop an understanding of these tactics, as strategies are discursive constructions and strategic planning meetings consist to a large extent of conversation and rhetoric. Previous studies have highlighted the importance of social practices in strategic planning meetings (Jarzabkowski & Seidl, 2008) as well as the central role of various kinds of strategy conversations (Westley, 1990; Samra-Fredericks, 2003; Kaplan, 2008; Spee & Jarzabkowski, 2011) but not elaborated on the role of rhetorical tactics in these meetings. In fact, there has been a relative lack of understanding of the rhetorical tactics used in strategic planning meetings or other strategy conversation. Our analysis has identified a range of tactics that are likely to be frequently used in strategic planning. By so doing, it adds to the more general understanding of the role of discourse and rhetoric in strategy process and practice research (Vaara & Whittington, 2012).

Second, our analysis adds to understanding of agency. Whilst previous studies have shown that people may assume different roles in strategizing (Mantere, 2008), how such subject positions are reconstructed in organizational interaction (Samra-Fredericks, 2005), and how certain discourses both impede and promote participation (Mantere & Vaara, 2008), there is a paucity of knowledge of how participants succeed or fail to exercise influence in strategic planning meetings. Our analysis has identified such practices in the form of rhetorical tactics and shown how certain individuals may

at times adopt authority positions and succeed in their rhetorical influence. It should be noted that such influence might involve both promotion of news ideas and resistance to change (Laine & Vaara, 2007). These findings also add to research on middle managers in strategy and strategizing (Wooldridge et al., 2008) by highlighting the fact that strategy conversations provide opportunities for those who are not top managers to succeed in exercising significant influence.

By so doing, this analysis contributes to a fuller understanding of agency in strategy. Traditionally, strategy scholars have assumed that top managers are omnipotent agents and not problematized their power position. In turn, more critical studies of strategy have at times given little agency to managerial actors when emphasizing the overwhelming power of discourse (Knights & Morgan, 1991; Mantere & Vaara, 2008). Our analysis provides a perspective that helps to reconcile these seemingly incompatible views. On other hand, certain individuals may at times emerge as authors and powerful rhetors. On the other hand, all this is influenced by the prevailing discourses, their conventions, and repetition. In this view, these discourses are both enabling and constraining in terms of allowing for or impeding the agency of individuals aspiring to exercise influence. The emergent view is that situation-specific agency is more complex and fluid than we usually think – or like to think.

Third, this study has methodological implications in the sense that it shows how in-depth analyses of strategic planning meetings or more generally any decision-making greatly benefit from access to naturally occurring talk (Potter & Whetherell, 1987). It is only such research design that can yield valid information about the micro-level tactics in strategizing as it unfolds in conversations. Furthermore, our method that combines detailed analysis of meeting conversations with interviews has clear advantages in terms of triangulation of data and validation of interpretations. This is not to say that every study of strategy and strategizing should follow such methods, but this kind of approach that ascertains triangulation is very fruitful way to proceed with i micro-level analyses of strategy formulation.

This study has limitations that should be taken seriously. Whilst our analysis is based on unique access and extensive data of naturally occurring talk, our study is limited by its focus on a specific case and its idiosyncratic features. Moreover, the organization type and national cultural setting undoubtedly influence our findings, and thus caution should be exercised when generalizing these results. However, it should be noted that we have aimed at analytical generalizations, and it is very likely that similar kinds of rhetorical tactics also characterize strategic planning in other contexts. Whether and to which extent this is the case will be a major challenge for future research. It would therefore be important to study strategy conversations in other organizational and national cultural contexts and to compare the findings. This would lead to a better understanding of the discursive and other social practices in strategic planning and add to our knowledge of how influence is exercised and agency construed.

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5 APPROPRIATING THE WORDS OF STRATEGY IN PERFORMANCE APPRAISAL INTERVIEWS[12]

5.1. Introduction

Recent examinations of strategy discourse have drawn attention to the colonization of organizations by strategy language (Carter & Mueller, 2006; Kornberger & Clegg, 2011). Such diffusion of strategy and its colonization of organizations mean that strategy discourse has become not only important but also powerful by producing forms of knowledge and subjects (e.g. Allard-Poesi, 2010; Ezzamel & Willmott, 2008; Knights & Morgan, 1991; Samra-Fredericks, 2005). Furthermore, it has been recognized that strategy has performative effects by means of strategic plans that inscribe power relationships and social order in organizations (Spee & Jarzabkowski, 2011; Vaara, Sorsa & Pälli, 2010) and through "textual agency" (see Cooren, Matte, Taylor & Vasquez, 2007; Cooren, 2008). Although the focus of these studies has been on strategic plans and the practices through which those plans are created, the question of how strategic plans are invoked in face-to-face interaction by managers and employees remains an under-explored phenomenon. This is unfortunate because as noted already by Barry and Elmes (1997), we do not fully understand what the constructions inscribed in strategic plans mean for other organizational actors. This study therefore aims to extend our understanding of how strategic plans exert their influence by examining strategy in performance appraisal interviews (hereinafter PAs[13]), which are one of the most common managerial practices in contemporary organizations.

Our interest in PAs springs from both the importance of a better understanding of the communication in these situations and of how this communication is linked to the power of strategy discourse. To address these issues we examine PAs as sites for "strategically aligned behavior" (Van Riel, Berens & Dijkstra, 2009) through ethnomethodology-informed dialogical analysis (Bakhtin, 1986; Heath & Luff, 2007; Hutchby & Wooffitt, 1998; Linell, 2009). We analyze the power and dominance of strategy discourse through the concept of *ventriloquism*, the voicing of someone else's words (Bakhtin, 1981; Cooren, 2010, 2012). From this perspective, texts such as strategic plans and their derivatives are both material and semiotic "agents" that contribute to the social interaction of strategizing by means of their binding properties (visions, mission statements, objectives, principles, values), which lend weight to issues that are put forward in subsequent discussions. The emphasis that is put on *multi-modal* social interaction (Fairhurst & Grant, 2010, p. 290-292) in this study means that the material and physical aspects of interaction are included in the analysis of discourse to build a better understanding of how the power of strategy is communicatively constituted.

In our empirical analysis we concentrated on two Finnish public organizations, "State Church" and "Bay City" (pseudonyms for a church organization and a city

[12] This essay is written with senior lecturer Pekka Pälli, Aalto School of Economics, and PhD student Piia Mikkola, University of Vaasa.

[13] PA processes and the conduct of PAs have provoked lively debate and interest ever since the Second World War (e.g. Bach, 2000; Den Hartog, Boselie & Pauuwe, 2004; Drucker, 1954; Townley, 1993; 1997; 1999). However, although research has recently focused on issues such as job satisfaction, commitment, trust, efficiency, and culture (e.g. Chiang & Birtch, 2010; Jawahar, 2006; Jawahar & Williams, 1997; Jordan & Nasis, 1992; Mayer & Davis, 1999; Poon, 2004), the interpersonal aspects of interaction in PAs have remained a largely unexplored phenomenon (Gordon & Stewart, 2009) Only recently have communication researchers drawn attention to social interaction in PAs (Asmuß, 2008; Clifton, 2012; Sandlund et al., 2011).

organization), which have recently developed their strategic management practices. These organizations provided a particularly interesting setting for our analysis because in both of them PAs were acknowledged and emphasized as an arena for discussing how each employee's work was related to the organization's strategy. Thus, these organizations acknowledged PAs as tools and sites for aligning employees with the strategy. We gained access to video-record 13 PAs and examined in detail how the participants appropriated and attributed power and agency to strategy in situational discourse. Through our dialogic analysis we discovered that strategy is a third party in a conversation that is embodied and the acts both as a text behind the conversation and as a text here and now. We will explicate the dynamics produced by this third party in the PA dialogue between interviewers and interviewees.

5.2. Power and the language of strategy

Scholars have approached the power of strategy language from different angles; e.g. Critical Theory, Narratology, and Critical Discourse Analysis (Barry & Elmes, 1997; Knights & Morgan, 1991; Levy, Alvesson & Willmott, 2004; Phillips, Sewell & Jaynes, 2008; Vaara, 2010). Although these approaches have different epistemological backgrounds, they share an emphasis on the ideological and political nature of strategy. They also share the view that strategy language not only represents organizational visions and purposes, but also constitutes the organization and its purpose in a specific way, and positions people in particular ways as social subjects (e.g. as leaders and followers, as strategic actors and operational actors). In very concrete terms, the empirical studies of this literature have revealed that far from being a neutral tool, strategy is a performative discourse that influences the way people think, talk, and act by mobilizing their will and legitimating the outcomes of their practice (Ezzamel & Willmott, 2004, 2008; Kornberger & Clegg, 2011). By taking seriously these arguments about the power and performativeness of strategy language, in this paper we add to the previous studies by examining how the power of strategy is communicatively constituted in real-time, face-to-face situations.

We follow the growing interest in how the power of strategy is constituted in naturally occurring situations (Samra-Fredericks, 2003, 2004, 2005, 2010) and how this power is enacted in concrete means and sources such as plans and protocols (Cornut, Giroux & Langley, 2012; Spee & Jarzabkowski, 2011; Vaara et al., 2010; Whittle & Mueller, 2010). This literature has contributed to the larger Strategy as Practice research agenda (for an introduction see e.g. Golhorski, Rouleau, Seidl & Vaara, 2010; Jarzabkowski, 2005; Johnson, Langley, Melin & Whittington, 2007; Whittington, 2006) by drawing attention to the minutiae of local strategizing activities and practices. Specifically, when examining how strategy is constituted in naturally occurring strategy conversations, Samra-Fredericks (2010) has emphasized analysis of the everyday doing of strategy by individuals by drawing on Harold Garfinkel's (1967; Heritage, 1984) ethnomethodology and Harvey Sacks' (1992) Conversation Analysis. While interview-based analyses have been able to uncover through people's accounts the social practices and discourses that reproduce specific conceptions of strategy work and legitimize particular forms of practice (e.g. Laine & Vaara, 2007; Mantere & Vaara, 2008), the emphasis on everyday doing centers on the methods of participants in the constitution of phenomena and holds the key to understanding how the power of strategy is locally and practically achieved (Samra-Fredericks, 2005). In other words, previous work has stressed the discourses through which organizational actors make sense of and give sense to strategy and strategizing, rather than how people actively co-construct these in communication.

In fact, the argument that communication constitutes the power of strategy echoes the theorization of the communicative constitution of organization ("CCO," see Ashcraft,

Kuhn, & Cooren, 2009; Cooren, Kuhn, Cornelissen & Clark, 2011; Putnam & Nicotera, 2009) and specifically the ideas developed in the Montreal school of organizational communication, which underscores that "organizations are embodied in interaction, textually and conversationally" (Ashcraft et al. 2009: 21). The insight provided by the Montreal school is that phenomena such as strategy are not only co-created *in situ,* but that it is also through texts that they are recognized and described (Cooren, Taylor & Van Every, 2006; Katambwe & Taylor, 2006; Taylor & Van Every, 2000). As explained by Putnam and Cooren (2004), the crucial issue in CCO is not to examine discourse "as *shaped* by 'something else,' for instance, ideologies, power, or political struggles," but to show how these phenomena are talked into being in the first place.

Drawing on these ideas, some strategy scholars have already examined how concrete means and sources such as tools and plans participate in the constitution of the power of strategy by disciplining the talk in organizations (Spee & Jarzabkowski, 2011) and by legitimating the specific interests of organizational actors (Whittle & Mueller, 2010) through the potential force embedded in these objects (Vaara et al., 2010). Analyses of *genre* in particular have helped scholars to understand better how language is consequential in constituting strategic plans and protocols as powerful actants in organizations. For example, Kaplan (2011) examined Power Point as a genre that both enabled and constrained negotiation and participation in strategy making by certifying some ideas and excluding others through the discursive practices of collaboration and cartography. Her genre-in-use analysis interestingly shows how strategic tools such as Power Point not only enable communication and translation of knowledge across different interest groups, but also build boundaries between stakeholders by impeding and excluding specific views.

Strategic plans have also been examined as a distinctive genre. Pälli, Vaara, and Sorsa (2009) analyzed the institutionalized nature of strategic plans and identified the specific communicative purposes that these plans embody: education, self-legitimation, guiding future action, building identity, and promotion. Cornut, Giroux, and Langley (2012) extended this understanding of the generic features of strategy by comparing strategic plans with different textual genres, ranging from research articles and organizational annual reports to articles from the magazines *Business Week* and *Fortune* and even to horoscopes! In an extensive analysis of these naturally occurring texts, they showed that strategic plans are characterized by distinctive linguistic and lexical features that construct them as inspirational and unifying texts through the language of optimism, collaboration, and achievement. They also raised the interesting argument that "what makes a strategist, other than merely being involved in strategy, is an ability to instantiate the genre of a 'strategic plan' through an appropriate use of the language" (Cornut et al. 2012: 44).

Our study is specifically interested in this appropriation. Building on the previous contributions of the ethnomethodological and CCO-inspired strategy literature, we are specifically interested in *how* individuals appropriate strategy by putting their words, bodies, and objects to work. More specifically, we examine in this study how the power inscribed in strategic plans comes into being when organizational actors such as middle managers and employees use these plans in their dialogue. Moreover, although performance appraisals are mentioned as an important arena for strategy implementation (Caruth & Humphries, 2008), discursive strategy research has still not analyzed these situations. Thus, we are intrigued *whether* and *how* organizational sites such as PAs are *made* arenas for strategizing in dialogue the between interviewer and interviewee. While there are many approaches to organizational dialogue (see e.g. Tsoukas, 2009), this study focuses on its social interaction aspect, which takes place in real-time, face-to-face encounters. Below we outline our way of approaching dialogue and analyzing it in terms of ventriloquism, multimodality, and intertextuality.

5.3. Analyzing dialogue

We conceptualize dialogue as joint activity between speakers who reciprocally construct meaning in their exchange of messages (Isaacs, 1999, p. 19-20; Walton, 2000, p. 333-334; Beech, 2008; Tsoukas, 2009). This conceptualization relies specifically on Mikhail Bakhtin's dialogism (e.g. 1981; 1986), which has evolved as an epistemology of discourse, extending from the description of communication in dyads to a "general epistemology of cognition and communication" (Linell, 1998, p. xi). Our analysis of dialogue stems from the original ideas of Bakhtin (e.g. 1981; 1986), who explained the principles of intertextuality and dialogue by pointing out that when speaking, an individual appropriates the words of others. Appropriation occurs through "ventriloquism" (Bakhtin, 1981; Cooren, 2010), which is a process whereby one voice speaks through another. In other words, ventriloquism means the voicing of someone else's words, the intention and accent of which are reflected, represented, and responded to, or conversely excluded or suppressed in situational utterances. Cooren (2010) suggests that it would be important to illustrate this phenomenon empirically, at the level of conversations.

In this paper someone else's words, the voice of the other, means "the voice of strategy." Strategy is seen as a "figure" (Cooren, 2010; Taylor & Van Every, 2000) whose voice may be represented, made present, and/or ventriloquized in the dialogue between participants in PAs. Keeping in mind Bakhtin's remark that "the speaker's evaluative attitude toward the subject of his speech… determines the choice of lexical, grammatical, and compositional means of an utterance" (1986, p. 84), our analysis also examines strategy as not only a voice of the other, but also and simultaneously the subject of discussion in PAs. This means that we analyze how the discussants' use of language, including their gestures, expresses their attitudes toward strategy.

In dialogical analyses gesture, body movement, and facial expression are understood as different kinds of semiotic resources through which participants in interaction establish mutual orientation that displays recipiency and co-participation (Goodwin & Goodwin, 1986; Goodwin, 2000). Neither verbal nor non-verbal communications is studied in its own right, but rather by exploring the relationships between speech and body movement (Goodwin, 1981; 2000; Heath & Luff, 2007). As argued by Goodwin (2000: 1492) "both talk and gesture can index, construe, or treat as irrelevant, entities in the participants' surround"; these entities are material objects, physical sites, or abstract principles, statements, objectives, and values. In this study, we focus on participants' multi-modal use of strategic plans. Following Glenn and LeBaron (2011), the documents (in their case applicant files) used by participants in their multimodal behavior are an important resource for participants in communicating what they know, how they know it, and who they are in relation to the current activity. We are interested particularly in how strategic plans function as resources for the multimodal behavior of participants in PAs.

The dialogical perspective also lends itself to intertextual analysis that aims at understanding how specific practices are constituted in and through "genre chains" (Fairclough, 2003, p. 31-32). The idea behind genre chains is that what people say and how they say it is affected not only by the genre of the situated communicative event (e.g. a specific appraisal interview), but also by the genres to which texts or other communicative interactions belong prior or subsequent to a given event. Interestingly, Fairclough (2006, p. 83-84) elaborates on this theme by describing how "staff appraisal" can be viewed as a chain of "diverse genres that are linked together to constitute the procedure as a larger whole." For example, the interview entails writing and reading activities both before and after the face-to-face-discussion (ibid.). In short, this means that the text-to-come (e.g. the appraisee's report) with its formal characteristics as well as the preceding texts (e.g. the employee's CV and pre-filled

interview forms) shape the interaction (for similar observations see Komter, 2006). In this paper, we employ the idea of genre chains in that we interpret the situational interaction in terms of how it builds from and makes use of both generic and organization-specific strategy texts and discourses.

In brief then, the literature cited above on ventriloquism, multimodality, and intertextuality guides our attention to the appropriation of the words of strategy in PAs.

5.4. Research setting and analytical procedure

The data for this research were gathered from two public organizations in Finland, 'State Church and 'Bay City.' State Church is an interesting case as such because strategic management was seen there as a practice that could "solve work well-being problems and more general management problems" (Dean of State Church). The church's barometer of working conditions, which examines the working atmosphere nationally every other year, had showed in 2009 that State Church had problems with several managerial issues. When the top management of State Church gathered more precise information about the management problems, they discovered that "a carefully thought-out direction for leadership" (Dean of State Church) was lacking and that work tasks were not prioritized on the basis of conscious decisions. This meant that some employees lacked job descriptions and goals and resulted in conflicts between employees and within and between the work teams, and consequently had an adverse effect on wellbeing and productivity.

When we began to video-record the PAs of State Church, the top management had just revised the strategic plan of the organization through an extensive participatory process. This strategic plan was based on four strategic excellence projects called "Church Path," "Diversifying Worships," "New Divisions," and "Brand Factory," which "challenged supervisors and employees to work strategically" (Dean of State Church). The yearly PAs were acknowledged as an arena for aligning employees' work tasks with the excellence projects and the templates used in the PAs were structured accordingly. The PAs to which we were able to gain access were video-recorded at the administrative unit level, meaning that the interviewers were heads of units and the interviewees were team leaders who supervised a small number of employees. All of the discussants in the State Church case were long-time employees of the organization.

Bay City, in turn, had developed its strategic management practices over several years. It had not aligned its PAs with specific strategic projects, and hence the linkage between the strategic plan and the PAs was not as pronounced as in State Church. The PA template was not the same for everyone in Bay City; instead, the unit heads had developed their own PA templates that focused on general performance issues. At the time we gained access from Bay City to video-record PAs, the new strategy had just been approved by the City Council. It focused on environmental sustainability. The discussants in the Bay City PAs held positions similar to those of the State Church discussants; the interviewer was a unit head and the interviewees were supervisors in their own working units.

Because our study involved video-recorded data, access to record the PAs was requested in writing from both the superior and the subordinate. The letter was framed as follows: "We hope that you are interested in participating in a voluntary research project that will examine communication in performance appraisals and the development of strategic management in State Church/Bay City. With the data from the performance appraisal interviews – both the conversation and the documents involved – we will analyze the practices of dialogical management. This study aims to develop performance appraisals as tools in management and supervision as well as to

increase understanding of those factors that either enable or impede the sense of participation in organizations." In the letter we asked permission to video-record the discussion and promised to conceal the identity of everyone participating in the research as well as the names of both organizations. We also left each discussant our contact information so that they could contact us if they wished to withdraw from the study.

Altogether we gained access to video-record 13 PAs, which lasted from 1 to 2 hours. We recorded the full discussion and also gathered the templates used in the situation to understand the structure of the conversation better. The original language of the data is Finnish. We have fully transcribed the data in the original language and the actual analyses were also conducted in Finnish, but the main results were translated into English. Although meanings and nuances were unavoidably lost in translation, we have translated the data in a way that preserves the spirit of the original language usage. We have also invented common English names for the speakers because we believe that it is easier to follow the analysis when pseudonyms are used instead of other symbols.

Our analysis of the data proceeded as follows. First, we all went through the data independently and marked the instances in which we found a connection with strategy texts and discourses. When we compared these observations in our data sessions we identified specific dialogical practices through which the discussants displayed their knowledge and understanding of strategy in the interaction. We noticed that the discussants often borrowed specific wordings from the strategy texts of the organization. We also noticed that in instances where the discussants used the words of strategy texts their gestures were sometimes aligned with what they said and sometimes dissociated from it. The usage of the text in the situation also prompted our curiosity; it seemed as if the papers on the table were like a third party in the situation. We then decided to focus more closely on a few illustrative examples to uncover the implications of these dialogical practices more specifically. Our results in the following section will show how strategy was embodied in the behavior of individuals and how strategy texts infiltrated the situated conversation in our performance appraisal interview data. We will also discuss how this intrusion was consequential for the constitution of PAs as sites for strategizing.

5.5. Findings

5.5.1. Embodied strategy

Our first example is extracted from a conversation between Phil, the superior, and Kate, the subordinate, who is the director at the congregation's childcare and served the organization over ten years. In this comment sequence, Phil reflects on what Kate has said in the previous turns about the work of her department and the church's strategy. Kate explained that some of the employees in her department as well as certain other employees consider that strategic projects concern only those who do spiritual work and not the so-called laypersons who work in the organization. She also elaborated the ways in which the State Church's strategic projects could be linked to her department's work.

Extract 1. Concrete work and abstract strategies (State Church)

01 Phil: it is of course a good thing if .hh as far as work on childcare is

P gazes at K

K gazes at P

02 concerned so that that each one (.) would understand it as well as

03 possible that this, you know, concretely

P knocks on the table

04 impacts [my work.] or that it is kind of

P knocks on the table

05 Kate: [mmh. mmh.]

06 Phil: concretely linked to the work I do. hh because

P knocks on the table P knocks on the table

07 one of these risks in this bu- business of strategizing is

P knocks on the table

08 exactly that they .hh wha- what perhaps has an effect on the matter that

09 people feel that they ((strategies)) live a life of their own (.) that

10 there are things said in this way and [then] this actual

P draws a circle in the air with his left hand P moves his hand to the right

11 Kate: [mm.]

12 Phil: work of ours continues hh in this way.

Phil brings up the topic of possible risks in the "business of strategizing"[14]. First, he construes the risks as risks in strategy work in general and then he describes a commonly held conviction that abstract strategy talk is not easily linked to the concrete work of employees. Phil distinguishes between the concrete and the abstract with his gestures and other nonverbal action. He repeatedly marks the word "concrete" by knocking on the table. Abstract strategies are described verbally as "living a life of their own." To emphasize the discrepancy between the strategies' own life and concrete work, Phil first moves his left hand to the left, away from himself, and draws a circle in the air. When he goes on to talk about "actual work," he moves his hand right toward himself.

Through gestures Phil displays a widespread attitude toward what strategy is and toward how it is detached from employees' work. In addition to nonverbal behavior, Phil displays this attitude by talking in the first person singular and plural ("my work," "work of ours," lines 4, 12). We interpret this as an example of what Goffman (1981) has described as "footing." "Footing" allows Phil to take stock of the other and express that what he says is in fact a general idea, a way people think about the relationship between strategy and concrete work. Through displaying both verbally and nonverbally the general conviction that strategy is an autocommunicative or autopoietic entity (Broms & Gahmberg, 1983), and by stressing through knocking on the table the word "concrete" when emphasizing that it is important that the employees understand the

[14] In the Finnish original, Phil uses the expression 'strategiapuuhat', which has no direct translation in English. The latter part of the compound ('puuhat') means "activity" and adds a dismissive connotation to these meanings.

impact of strategy, Phil is able to specifically organize the central components of his action. As Goodwin (2000: 1499) explains, gestures provide participants with a semiotic modality for insisting that the other party take what the speaker is doing and saying into account.

In our second extract (Bay City) Salma, the interviewee, talks about the difference between a plan and a strategy. Salma is a kindergarten director and a member of a team of kindergarten directors. The team is preparing a document that concerns special education in kindergartens. In the extract, Salma is explaining to her superior that they are in the process of writing this document.

Salma expresses through her talk the existence of a chain of different documents, which she describes as having a hierarchical form. Hence, strategy and its various manifestations at different levels of the organization are positioned in relation to each other. Moreover, especially Salma's nonverbal behavior reconstitutes the common way of seeing strategies as "up there."

Extract 2. The City has the strategy, we have a plan (Bay City)

01 Salma: what if our .hhh hhh special education

02 what should it be called. I mean that could it, you know it's not

03 a strategy but should we call it an operation plan.

04 because the City has the strategy and then we do the operation plan

S lifts right hand up *S lowers right hand*

05 according to that. .hhh and then this kinder- kindergarten's (0.6) this

S moves both hands left *S shuffles through the papers*

06 special education that it would link so that it would then become this

S draws a line with her hands and stretches it

07 early education plan.

Salma is trying to find words for the document that they are preparing and simultaneously describes the linkage between the City's strategic plan, the service unit's operation plan (the early education plan), and her own team's document (the special education plan). She describes strategy by raising her hand and lowers her hand when talking about the operation plan. Furthermore, Salma describes the relationship between "the special education plan" and "the early education plan" by drawing a line and stretching it with her hands.

Through these gestures Salma displays an understanding that strategy is "up there" and operation "down here," and that the operation plan diffuses into other documents. The embodied metaphors of strategy are therefore clearly orientational (Lakoff & Johnson, 1980/2003): through them (e.g. spatial up-down-relation) Salma expresses the location of strategy and its relation to herself and her work. Also, she expresses relations between different strategic activities in her and her team's strategy work with orientational metaphors. Our contention is that Salma's non-verbal metaphors are illustrative devices to aid her understanding of strategy work. In a way, she is "feeling" her way around the organization's strategy work by capturing the perceptions and relations to the strategy through her gestures.

These extracts are interesting and revealing in terms of how participants in PAs create a lifeworld where strategy is a particular kind of entity comprehensible through their verbal and non-verbal behavior. By using orientational metaphors, the participants organized an order that included themselves, their work, organizational strategy, and various strategic activities in their own work units. They did this in a systematized way: organizational strategy was displayed as being "away from oneself" or "up," whereas the participants' concrete work and the strategic activities and texts of their own units were displayed as being closer to oneself. The use of embodied orientational metaphors also suggests that the participants were actively trying to work out how general strategy discourse and organizational strategy are linked to their work by drawing connecting lines in the air or gesturing a continuum of abstract strategy and concrete work. The ontological metaphors with which the speakers gave concrete forms and shapes or a kind of "physical appearance" as an object to strategy suggest in turn a need to make strategy tangible and hence understandable, both for the sake of the speaker's own understanding and for the flow of interaction.

5.5.2. Strategy as text behind the interaction

A recognizable feature of talk in our data was the frequent use of external voice that transcended the situation. This external voice can be seen as the voice of a general strategy discourse. At the same time, however, it is a voice borrowed from organization-specific strategy text. In the following extract Kate, the interviewee, borrows the exact wording from State Church's strategic plan when she displays her competence in instantiating the genre of strategy in a conversational sequence in which the participants discuss how each employee should feel that their work is part of a larger organizational importance.

Extract 3. The most significant spiritual community (State Church)

01 Kate: but just by the same token if we think about that we should be, you

K gazes at doc

P gazes at K

02 know, <the most significant spiritual community> (.) then if those

K gazes at P

03 experiences of those people who'r' in the cemetery or in the chapel o-

04 or somewhere else are bad[15] then th- that is not at any rate contributing

05 t[o th]at th' we would be the most significant spiritual community

06 Phil: [mm.]

07 Kate: and that the people would long for and would come to our socials and

08 would partici°pate so,° ---

K gazes at doc

[15] We wish to point out that in this context the meaning of the utterance 'people who are in the cemetery or in the chapel' denotes the employees that work there.

In this extract the features of speech signal external voice, which is the voice of strategy. Kate – the interviewee – borrows the voice of strategy when she talks about "the most significant spiritual community." The utterance is a direct quote from the strategy, and Kate's gaze also demonstrates that she is orienting toward the utterance in the interview sheet. She emphasizes each separate word by accenting the first syllables and by slowing down the tempo of speech after which she soon directs her gaze to the superior during the quote. All these verbal and non-verbal cues are ways of marking the utterance as important for Kate's speech and a way of expressing an orientation toward the church's strategic plan.

Although her superior has not directly asked Kate to comment on strategy, Kate brings up the topic and begins to appropriate the strategic plan in light of her own knowledge. First, Kate makes a knowledge-based evaluation of what would not contribute to the aim of being "the most significant spiritual community" when she implies that she knows of bad "customer" experiences (l. 2-4). Second, in lines 6 to 7, she actually appropriates the strategic plan by giving a context-bound explanation of "the most significant spiritual community." That is, "that the people would long for and would come to our socials." This knowledge-based evaluation and the following context-bound explanation are resources that Kate can use to display her knowledge of the appropriate use of the church's strategy and to align herself with it. Another way to comprehend Kate's action is to emphasize that she is speaking in the name of more general strategy discourse - in this case how each employee's work should be aligned with organizational goals.

Similar appropriation emerged in the Bay City case:

Extract 4. All the way from the City's strategy (Bay City)

01 Karl: ha- have y' thought on your kindergarten's behalf (.) ◦objectives for the

S gazes at K

K gazes at S

02 following year.° (0.8)

03 Susan: objectives are those that we could better respond to these, it comes

K gazes at doc

K writes

04 all the way from th' City's strategy this prevention of

S sweeps with her right hand to the left

05 social exclusion an- and the children's different needs. (1.8) well, that is the

06 setting in which we're now aiming to make the personnel's cooperation,

07 closer, optimize multi-vocational cooperation, (1.6) and then that tha-

S gazes at doc

08 you know I will give, like a manager, support so that they will have enough

09 strength to do that work and then also (.) I should think of these methods,

10 you know, that how we're going to increase efficiency so we've

S gazes at K

11 mhh Second Step[16] -program we'll introduce, interaction games. so we,

K quits writing

12 the whole kindergarten, are going to stress this learning of interaction

13 [(0.8)] and social skills.

K gazes at S

14 Karl: [Yea.]

Here the superior, Karl, and the employee, Susan, are examining the objectives of Susan's work from the perspective of the City's strategy. Although Susan is not explicitly referring to a specific strategic project as in the previous extract, she borrows concepts from the City's strategy (l. 6-7). By pointing out that "the prevention of social exclusion" comes "all the way from strategy," Susan shows that the City's strategic plan is the basis for the objectives of her work. As in Kate's expression in the previous extract, Susan uses emphasis to mark the importance of the borrowed concept.

Note also that Susan's gesture in line 4 positions strategy on one side. Her gesture together with the linguistic cue "all the way" (l. 4) constitutes strategy as a remote abstraction. Importantly, however, the hand movement as an orientational metaphor together with the use of language signals how strategy is brought into the discussion as an authoritative third party that lends weight to Susan's propositions. In fact, although Susan's gestures suggest that strategy is remote and abstract, this does not prevent her from using the words of strategy to do her duty, which is to act in accordance with the tacit assumptions about her responsibilities as an interviewee in the PA to order to align her objectives with the city's strategy. As Cooren explains (2010: 106), adopting the voice of an authority, in this case that of the strategy, can be understood as a move to lend objectivity to one's claims.

As noted in previous analyses of strategy discourse (Laine & Vaara 2007; Mantere & Vaara, 2008), strategy is often resisted by arguing that it does not bring anything new to the actual work. This kind of talk was also typical in our data. In our last extract in this section, the interviewee, Ann, expresses this common attitude when she speaks with her superior about the church's strategy. "Church Path" is the name of one of the excellence projects in the organization's new strategy.

Extract 5. We're already walking on the Church Path (State Church)

01 Ann: those are already happening and these issues are then written into strategy

L gazes at A *A gazes at L*

A gazes past

02 and it is ok but I think it (look-) I don' know. like the Church Path,

03 ((with an irritated voice)) we're already walking on the church path

04 all the time ◦and◦,

[16] Second Step = Social-emotional skills for early learning

05 Lisa: yeah,=

06 Ann: =AND WE have already done a huge amount of this

07 Ann: cooperation and everything [.hh y]ou know, it is like putting a stamp on

L nods her head

08 Lisa: [ye-]

09Ann: this that it is o[kay.]

10 Lisa: [yes,] but I feel that what's new is that we really would

L gazes past

11 learn to see what is the big picture (.) where we [are an]d what is that what

L gazes at A

12 Ann: [yeah?]

13 Lisa: we're [doing.]

14 Ann: [yeah?]

A gazes at table

In regard to our interpretation of appropriation, it is important to notice that Ann's critique is about issues manifested by strategy that she thinks are "already" (l. 3, 5) doing a "great deal of" (l. 5) "all the time" (l. 3). She expresses her cynicism by suspecting that strategy merely legitimates existing work (l. 8). Ann's turn makes the superior, Lisa, defend the new strategy and its ideas like "Church Path" (l. 9-11). Note too, that Lisa does not actually object to Ann's argument, but adds a new theme of "learning to see the big picture," which serves as an argument for the usefulness of the strategy. However, Ann's reaction in lines 12 and 14 reveals that she does not necessarily appreciate this new theme.

Most importantly, the extract highlights a common attitude to the role of strategy texts more generally than what is the case with the "Church Path" mentioned by Ann as an example. For Ann, strategy is the textual work of giving names and describing activities that they are doing already. The role of text is thus to legitimate some parts of work as strategic. Ann's behavior also suggests that her expectations of strategy are being betrayed. Although we do not know exactly what these expectations are, Ann's behavior becomes more understandable if we see it as a result of disappointment in what she expects from the church's strategy according to more generic features of strategy (e.g. those identified by Cornut et al. (2012) - optimism, collaboration and achievement). In Ann's words (l. 7-9): "putting a stamp on this that it is okay," is not satisfactory.

Our findings thus suggest that when strategy was text behind the conversation, the discussants gave meanings to the organizational strategy in two interconnected ways: first, they appropriated general strategy discourse, and second, they appropriated meanings from the organization's strategy text. Overall, the appropriation seems to be about instantiating the possible meanings of strategy in the context of the interviewees' own work. In this process of appropriation, the participants negotiate the meanings of various strategic texts and plan forthcoming texts to a large degree. This finding emphasizes that strategy could be seen as hidden structure behind the conversation. The building of intertextual linkages between different texts is therefore an important duty for the participants and it is expected and even necessary that the discussants –

for the sake of the flow of the conversation and for performing their institutional roles in the interactional event – recontextualize and appropriate the topics from the documents that guide the actual interview.

In addition, our analysis shows that voicing someone else's words is often manifested in discourse. This means that the process of ventriloquism is signaled in speech by using accent – by "quoting voice" or structures that are recognizably literal. We observed that this kind of *manifest intertextuality* (Fairclough, 1992) was often accompanied by the speaker's appraising attitude. In simple terms, when voicing texts or discourses, speakers displayed their attitudes toward them. Our three different extracts from Bay City's and State Church's PAs highlight that ventriloquism appeared as a resource for displaying a variety of attitudes: In Extract 3, we saw Kate displaying her competence in appraising strategy by borrowing exact words from the church's strategic plan and this way displaying her knowledge of strategy and competence in appraising it. In Extract 4, Salma lent objectivity to her claims by speaking in the name of Bay City's strategy. And in Extract 5, Ann displayed her disappointment in what is expected from a figure such as strategy.

5.5.3. Strategy as text here-and-now

As we analyzed the interaction in the PAs, the role of the papers struck us as surprisingly important. Sometimes we got the impression that the discussants were talking to the paper and with the paper – it seemed that the paper piles were almost a third party in the conversation. Importantly, we noted that besides being important instrumentalities in the interaction between the discussants, the papers played a specific role as an artifact in which strategy is materialized. To illustrate this, we present two pictures and the accompanying transcripts of the interview situations. For the sake of anonymity, the pictures are drawings reproduced from the screenshots of the video-recording.

Extract 6. Now this is it. (Bay City)



On the left is Karl, the superior. June, on the right, is the interviewee in this appraisal. They are talking about the strategic document that guides work in Early Learning Services (the name of the office). The table between them is covered with various sheets and piles of papers. At this stage of the discussion, June picked up the strategic document for Early Learning Services. As a unit manager, June had recently attended a district meeting with the other unit managers. The following stretch of conversation takes place:

Transcript of the Extract 6.

01 June: look, and I show- I showed in our district's mee[ting]that now this is it (.)

02 Karl: [yea.]

03 June: and then those changes the[y com]e from there. [(0.6) so] those actualize

04 Karl: [yeah.] [exactly.]

05 June: only then when,

06 Karl: yes so that is now the one that is at the moment.

07 June: exactly. yes it is now, this is the one we follow no[w.]

J taps the document with the pen

08 Karl: [yeah.] yes. an- (.) and

09 the Early learning services has decided ◦so◦.

10 June: oh yes,

11 Karl: and then when those changes come then those will be added. this year

12 we'll work with, =

13 June: = yeah. this year we'll work with this.

The extract pinpoints the mediated character of the interaction. Both Karl and June are looking at the paper that June is holding upright. By using demonstratives such as "*this* is *it*," "*those*...from...*there"* (l. 1-2), "*those*" (l. 4), "*that* is now" (l. 5), "*this*" (l. 6, 10) both speakers orient to the paper both as an artifact and a semiotic object. In this regard, the paper has power and agency in two ways. First, through its physicality, it becomes an agent in the situation. For June, the paper seems to serve as a helping hand that she needs in her explanation. For Karl, this helping hand becomes a physical party to which he has to direct his attention. The physical presence of the paper is thus relevant for the entire situation and for both participants. As to the semiotic dimension, the paper gains influence as it is jointly constructed as official and legitimate, as a document that should be obeyed. In June's words, "this is the one" (l. 7). In other words, she says that she has used the paper at a district meeting to explain the proper working guidelines to the other unit managers. Importantly, it is thus not June who has been in the power position to explain to others how things are. It is the paper, and in fact June, who has acted as an instrument by showing the paper.

The power and agency of the document is thus two-fold. On the one hand, it is an instrument that is used as a tool in the interview situation and – as June implies (l. 1, "I showed this") – in the other interactional situations as well. Importantly, the document's ability to function simultaneously as a powerful semiotic and material object in interaction is thus highlighted. On the other hand, the document encompasses

situation-transcending power: the document *per se* is the authority that explains how things are and provides the guidelines that have to be followed. Note how this semiotic power is treated as undisputed in the extract. It is taken for granted that the document must be followed if it is the latest version or becomes so. Metaphorically speaking, the document is the sheriff and especially June is merely convincing Karl that the sheriff has a badge and hence official authority.

Our last example is from a State Church discussion. Just before this scene unfolded, the superior, Phil (on the right), had copied the interview sheet, which consists of Ed's comments on the topics discussed as well as Phil's responses to them, because Ed had not brought the papers with him to the PA. As can be seen from the picture, both are looking intensely at the papers.

Extract 7. Ongoing work.



Transcript of the Extract 6

01 Phil: well: (0.7) I would like to ask about this question number one. (.)

P gazes at doc

E gazes at doc

02 or, are you there [(.) at this spot,] well: (0.4) about this

P gazes at E

03 Ed: [Yes. >Just go ahead.<]

04 Phil: "I will accomplish the goals," (how are) you going to accomplish your

05 goals. = this "work is <u>ongoing</u>." what's (.) in it (.) >that you've written it

06 in this ◦way◦.<

07 Ed: [it-]

08 Phil: [su]re this is Finnish and I understand what this means but what are

09 those thoughts as to,

P gazes at doc

10 (1.2)

11 Ed: well because it's (.) y'know 'cos the starting point is that the work of

P gazes at E

12 Ed: pastoral care at the hospital takes place where a human being suffers.

E stresses the words with his finger up

13 and when the one in crisis is supported, then (.) this (.) these value devices

14 are used. so, we:ll (.) it (.) it is really ongoing. that in it. (.) it is like

15 y'know (.) that the deepest content of it is <u>probably</u> that the crisis oriented

16 nature of the hospital pastoral care makes the work ongoing. = it does not

17 end.

18 Phil: hmm.

19 Ed: this human suffering that we encounter, that is ongoing. (.) and it includes

20 the risk that people get exhausted in this work.

The extract represents a typical case of the use of text in PAs. The text's physical materiality mediates the interaction when both direct their attention to the paper. Interestingly, they hold the texts upright, thereby creating a boundary between them. This use of the paper as a boundary suggests that papers may be used as tools for protecting face in interaction. Surely Phil and Ed are talking to each other, but the paper mediates their interaction in concrete terms. Text works as a device that reduces the potential of face threatening acts involved in face-to-face interaction by enabling the discussants to be behind the text and also to talk from behind it.

The semiotic capability of text to produce action and to have "textual agency" becomes obvious when we look at the quote "this work is ongoing" (l. 5) and how it is dealt with in the interaction. One way of looking at it is to see Phil quoting Ed, who has written "this work is ongoing" on the interview sheet. However, when looking at the extract more closely, we find that the quote "this work is ongoing" has begun to live a life of its own, detached from its original author, Ed. In a way, by asking Ed to explain and reflect on the quote (l. 5-10), Phil is holding Ed accountable for the text. In fact, Phil's turn (l. 8-9) implies that the quote has various potential meanings. In Ed's turn from line 10 onwards there are several perturbations such as discourse particles, a long pause in the beginning as well as several slight pauses, and especially the emphasized adverb "probably," which suggests that there are many ways of understanding what the quote means – even for Ed. His account is not so much an answer to a possible question of what *he* means by "this work is ongoing." Instead, the design of the turn suggests that he is giving a plausible explanation for the quote in the context of his work.

Our findings thus suggest that texts are physical objects, which act as important resources in interaction; they are not only semiotic but also physical resources, tangible objects that have agency in interaction.

5.6. Conclusions

Although strategy discourse and the power of strategy language have been the focus of research in strategy discourse literature (e.g. Knights & Morgan, 1991; Levy et al., 2004; Mantere & Vaara, 2008; Phillips et al., 2008; Vaara, 2010), few studies have examined the language of strategy in face-to-face interaction (for an exception see Samra-Fredericks, 2003; Spee & Jarzabkowski, 2011). Our study has added to the previous literature regarding the power of strategy discourse by applying a dialogical method of analyzing video-recorded face-to-face interaction. In particular, these findings add to the literature on strategy tools and texts (Spee & Jarzabkowski, 2009; 2011; Vaara et al., 2010; Whittle & Mueller, 2010; Kaplan, 2011) by explaining how the power of strategy is coupled with semiotic and material texts. Also, our analysis is aligned with theoretical insights about the reciprocal relationship between text and talk in organizations (Cooren, Taylor & Van Every, 2006; Katambwe & Taylor, 2006; Taylor & Van Every, 2000) and we argue that our analysis has made a significant contribution to existing strategy discourse literature by analyzing real-time interaction in PAs and showing in concrete terms how people use their gestures to give sense to strategy and to emphasize the entity of their action. We also explained how texts gain agency in interaction both as semiotic and physical objects and advanced the theoretical literature of "textual agency" (e.g. Cooren, 2004, 2010) by showing how texts become agents in communication.

In particular, the analysis sheds light on the ventriloquizing of strategy discourse in situated interaction. We showed that this ventriloquism was marked through what Fairclough (1992) has termed *manifest intertextuality*. In other words, by using linguistic and nonverbal discursive resources, the participants in the PAs made strategy discourse and specific strategy texts visible and "knowable." The analysis also suggests that PAs are constituted as sites of strategy work by actively drawing on, echoing, and reproducing strategy texts. The specific kind of intertextuality that we interpreted as ventriloquism also suggests the existence of a network of interrelated communicative activities. In tune with Fairclough's (2003) theoretical insights regarding "genre chains," we conclude that this network forms a whole: the talk in the interview ascends from organization-specific strategy texts, which in turn echo general strategy discourse and generic characteristics of strategy texts (Cornut et al., 2012, Pälli et al., 2009). Also, what happens in the talk-in-interaction renews the context and builds a foundation for translations, transformations, and usage of strategy texts. Hence, the situated conversation works as a node in the network of communicative activities with which strategy is mobilized in organizations.

This study also furthers understanding of the power of strategy discourse (Knights & Morgan, 1991; Levy et al., 2003; Ezzamel & Willmott, 2008; Allard-Poési, 2010) by showing that when ventriloquizing the "voice of strategy," individuals also used it as a resource to display their attitudes toward strategy. This notion gave us a novel opportunity to examine how participants in PAs instantiate the genre of strategic plan with more or less subtle linguistic cues – sometimes maintaining social expectations, other times questioning them. Some of the participants instantiated strategy by displaying their knowledge of it and their competence in appraising it. Others built it as a figure that lends weight and objectivity to their claims. And some displayed their disappointment that the strategy was a figure that could not realize the expectations coming from its generic features, such as novelty, optimism, and achievement.

Moreover, we argue that our dialogical analysis can direct strategy research to take the prospect of video-ethnography seriously. Although language and its effects have been examined in strategy research by focusing on how actors construct their perceptions of strategic issues through interpretative and critical analyses, the ways in which people bring objects, sites, and their bodies to strategy work need further theorizing. On our part we have showed how the embodiment and textual agency of strategy are important characteristics and resources for the behavior of individuals in PAs. Although this situation is in many ways specific to strategy work overall, we suggest that these characteristics and resources may be transferable to other specific sites (e.g. strategic planning, strategic decision-making, strategy implementation, strategy meetings and workshops). Or they might act as an irritant – offering a platform for comparing similar and different findings (Law & Mol, 2006, p. 15). Further research is needed, however, to uncover what kind of discursive constructions of strategy people craft through their verbal and nonverbal behavior.

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Endnote

Transcription conventions for chapter 5.4.

[	point of overlap onset
]	an utterance or utterance part terminates vis-à-vis another
(0.0)	elapsed time in silence in tenths of seconds
(.)	a tiny gap within or between utterances
.	falling intonation
,	flat intonation
?	rising intonation
=	equal signs between two sentences indicate no break in an ongoing spate of talk
::	prolongation
word	stress in vocal tone
WORD	loud sounds relative to the surrounding talk
°	quiet sounds relative to the surrounding talk
hhh	outbreath
.hhh	inbreath
wo(h)rd	laughing quality
becau-	(a hyphen) cut-off
(())	transcribers' descriptions in addition to transcriptions
→	gaze direction (e.g. Kate →doc)
<slow>	slower pace than the surrounding talk. In reverse order, indicates a faster pace
"voice"	quotation voice
(*writes*)	nonverbal behavior is written in italics

6 WHO IS THE STRATEGIST? AN ANALYSIS OF A DISAGREEMENT IN STRATEGY FORMULATION MEETING

6.1. Introduction

In strategy research, there is a growing literature on discourse. This stance reveals how strategizing is an activity constituted through discourse (e.g. Knights & Morgan, 1991; Kornberger & Clegg, 2011) and performed in communication (e.g. Samra-Fredericks, 2003; Mantere & Vaara, 2008). Overall, there has been a call for "more work on communicative practice in organizations to examine what it is that actors do as they continuously construct reality" (Thomas, Sargent & Hardy, 2010: 37, citing Jarzabkowski, 2005). In line with this call, the main objective in this study is to extend specifically the literature that examines strategists' linguistic and rhetorical resources to influence the strategic planning processes.

Focusing on strategists' communication in a top management team, this study examines a socially constituted tension between senior managers and shows that 'being a strategist' is a fluctuating role even within a top management team. I draw on literature that focuses on how language is influential in constituting strategists' reality (e.g. Samra-Fredericks, 2003; Rouleau, 2005; Jarzabkowski & Sillince, 2007; Mantere & Vaara, 2008; Jarzabkowski & Balogun, 2009; Rouleau & Balogun, 2011). Although drawing on different discursive theories, a common element of these studies has been the recognition that language (whether in the form of sense-making, communication, discourse, or rhetoric) is influential in the constitution of 'the voice' for leaders and those involved in strategizing. Specifically, these studies have directed attention to the ways in which language is consequential in strategy work. However, we still know little of how communication actually unfolds in strategy work and what issues become important in such communicative situations.

Hence, the findings of this study are based on qualitative data analysis, which focuses on sequences of social interaction (Silverman, 2007: 61-84). The analysis of interactional sequences implies studying what participants of interaction accomplish, and 'how' this 'what' is accomplished in members' everyday and naturally occurring social situations (Boden, 1994; Samra-Fredericks, 2010). In this spirit, I emphasize that the focus is not on the individual and psychological attributes of participants of strategy formulation, but that these attributes are weighted in face-to-face contacts, which happen in socio-cultural contexts. Furthermore, consistent with the premises of communicative thinking (Cooren, Kuhn, Cornelissen & Clark, 2011), I stress the importance of in situ analysis as a foundation of capturing the actual activities of individuals in organizations.

The motivation for this type of analysis emerged during an ethnography of the strategy formulation meetings of a top management team (TMT), which was updating a strategic plan for a City organization. During these meetings, the key participants of the TMT displayed a tension with each other about how the strategic plan ought to be written. This resulted in face-saving practices as well as an enforced domain of participation obligations. Face-saving practices are, for example, those mitigating or 'sin-paying' practices that resolve the constituted tension. Management of involvement obligations is the constitution of those framings that constitute intersubjectivity among those involved.

Through a detailed analysis of this tension, I am able to support the findings of Samra-Fredericks (2003) on how strategizing is accomplished during 'real-time' talk-based

interaction. Her study showed how the linguistic skills of one specific manager to constitute strategic weaknesses were influential to the extent that the loss of credibility of another participant resulted in him eventually being fired. In a way, this study examines a very similar situation – someone's face and credibility being threatened – but in this case, the linguistic skills of one of the managers become consequential in the sensitivity to solve tensions, which are linked to participants' professional roles and power relations.

6.2. Strategy as language in use

Scholars have shown through different analytical routes how language and communication are important means to influence strategy work. For example, drawing on organizational sense-making literature (e.g. Gioia & Chittipeddi, 1991; Weick, 1995), Rouleau (2005) focused on a complex set of micro-practices through which middle managers interpret and sell strategic change in their everyday routines and conversations. She stresses that although the actors are not necessarily aware of their linguistic skills, these have a great impact on how the change process unfolds. Extending this understanding of the linguistic competence of individuals participating in strategy work, Rouleau and Balogun (2011) examined how middle managers' strategic sense-making is discursively performed as they attempt to draw people into the change. The insight stressed in their analysis is that, besides the strategic actors' competence in performing communication, their language use is intertwined with the context in which to use the language.

Jarzabkowski's and Sillince's (2007) also directed attention to strategists' rhetorical skills when they examined rhetorical practices by which top managers influence commitment to multiple strategic goals. They concluded that the interplay of the historical context, consistency of rhetoric with this specific context, and whether organizational members already value some of these goals determines whether commitment to strategy is strengthened through rhetoric. Their contextual rhetorical analysis contributed to the strategy discourse studies by explicating fine-grained understanding of how influence is used in strategy work through language (see also Heracleous & Barrett, 2001).

Furthermore, Mantere and Vaara (2008) examined through critical discursive analysis the problem of participation in strategy and concluded that there are competing discourses that have two fundamentally different kinds of implications in strategy work – discourses of mystification, disciplining and technologization impede participation, and the discourses of self-actualization, dialogization and concretization enable participation. Jarzabkowski and Balogun (2009) also focused their activity-theory-based analysis on politics and participation in strategy work and showed that strategic planning's integrative effects depend on the experience that each unit holds on strategic planning and on the subject position each individual is granted in the planning process. The authors stress that those who are granted a subordinate role in strategy process (e.g. who are moved from formulation to implementation) are likely to resist the plans formulated by powerful actors.

Furthermore, Samra-Fredericks (2003, 2004, 2005) introduced an ethnomethodological perspective to analyze strategy practice by examining how strategists manage meaning-making and influence strategic direction through their relational-rhetorical skills. The essential insight in these analyses is that individuals (the strategists) manage interpersonal relationships by *performing* the situation (the strategy conversation) in an appropriate way. Thus, it is important to focus the analysis on the actual categories employed by people to uncover how apparently obvious

phenomena are put together. This is why strategy practice is called a 'lived experience' (Samra-Fredericks, 2003) in ethnomethodological work.

I follow this lead and theorize strategy as 'participants' action' (Llewellyn & Spence, 2009) where strategy arises from laminated interaction processes (Boden, 1994). The *practice,* which is also the interest in this study, is examined as something that is available to those who participate in interaction. The details of social life - the actual methods that the participants use in producing, recognizing and responding to particular actions - are seen as informing us of the arrangements through which people construct their activities and make sense of their worlds. The primary objects of study are the structures and practices of human social interaction *per se* – not interaction as a carrier of other social phenomena (see Heritage, 1995; Zimmerman & Boden, 1991; Schegloff, 1992).

In simple terms, the focus in an ethnomethodological study is not on the demographic factors that would explain the actions of individuals, but on the factors that actors make relevant in their interaction. This does not mean that issues such as career experience, education, socio-economic background, age, gender, income, and so forth are not important in explaining action, but in the study, these factors become relevant only if they are meaningful to people in the situation. This meaningfulness is examined through the organized details of interaction that participants in strategy conversations use to display their understandings of 'the state of the talk' for one another, meaning that they "'make reasonable' their behavior to one another in their occasioned methodical selections of linguistic resources" (Fairhurst, 2007: 57; see also Llwellyn & Spence, 2009).

6.3. Analytical focus

Ethnomethodology-grounded analysis involves a specific type of approach to data. Through a detailed analysis of *in-situ* recorded interaction, the researcher is able to examine how apparently unremarkable aspects of our daily working lives turn out to be critical in understanding how people accomplish, experience and constitute work and organization (Llwellyn & Hindmarsch, 2010). In fact, from an ethnomethodology-informed research position, it is said to be impossible to know beforehand what the data will enable the researcher to express (Samra-Fredericks & Bargiela-Chiappini, 2008). In very concrete terms, this means, in ethnomethodology-informed analysis, locating single utterances within a sequence of talk to be able to see the process through which they take on meaning. Thus, it is important to record all the situations where the social interaction under examination takes place, which also ensures the reliability of the replication of what has been said.

In this study, I focus on the naturally occurring conversation and examine "*how* and *which* breaks from protocol are oriented to and by *whom*" (Fairhurst & Cooren, 2004). This means, in the context of strategy formulation, the displayed speech, movements, and emotions that do not follow the agenda somehow (the agenda being the frame that the speakers have constructed). In other words, the breaks from protocol can be understood as shifts in 'footing'. As Goffman (1981: 124-128) explains, the analysis of how people negotiate frames and communicate the changes in footing informs us about the participants' social roles and interpersonal alignments. A shift in footing can affect the status and social arrangements among participants. Some shifts are momentary interruptions in social relations that are later corrected. For example, Goffman describes Nixon momentarily shifting out of his presidential frame to make a personal comment on an outfit that Helen Thomas, a journalist, was wearing. (She was wearing a pantsuit, and he preferred her in a dress.) Goffman explains that this shift implicated Nixon's power position to force an individual who is female from her occupational role

into a domestic one. A broader implication of Nixon's shift in footing was the gender politics in which women were allowed to be commented on and constituted as objects of approving attention. Furthermore, as Levinson (1992) notes, some shifts in footing have enduring implications, transforming social relations, and sometimes entire activities, into something else.

To understand better strategy communication, it is useful to focus also on what is animating the interactants in conversational sequences of strategy formulation. The Montreal school of organizational communication has focused attention specifically on Actor Network Theory and its possible contributions to organizational communication and discourse studies (Cooren & Taylor, 1997; Cooren, 2001, 2004; Taylor & Van Every, 2000). These writings have extended traditional views of communication and interaction as two or more people interacting with each other, and made all of the actants present/absent in organizational situations, whether these actants are human or nonhuman, physically present or absent, and personal or collective. Through these analyses, they have not only problematized issues of agency, but also the ways in which various agents can tele-act, that is, act from a distance. As Fairhurst and Cooren (2009) explain "such, 'micro actors' can become 'macro actors' when they channel or make present one or more (distal) authoritative sources in a given situation".

Furthermore, Benoit-Barné and Cooren (2009) have stressed that textual agents, such as directives, labels, principles, and so on, participate in the process of presentification that creates the experience of "the world" as we know and experience it, and so literally participate in the local achievement of authority. They have developed a view of authority as an effect of presence, which allows researchers to examine organizational interactions in detail without downplaying the fact that organizations are political sites characterized by negotiations between various agents, each having their own sources of authority. In a way, this view is related to the concept of metaconversation (Robichaud, Giroux & Taylor, 2004), which explains how interaction may be read as contributing to a justification of the policies of the organization as a whole, with more institutionally based constraints (Taylor & Robichaud, 2007: 6-7).

In brief, the literature cited above has directed my attention to interaction and textual agents as well as to the institutionally based constraints in strategy.

6.4. Context

This study is based on findings from a longitudinal case study of strategizing in a City organization in northern Europe. I have observed strategizing practices in this City organization since 2006 in various scenes of activities. The management level of this City organization engages in a yearly strategic planning cycle, in which the strategic goals for the organization are re-examined, new ideas introduced, and intra- and extra-organizational, environmental, and societal situations evaluated. This work is done through institutionalized meeting practices over time and space, including the preparation and the evaluation of the strategic plan in various different groups. The City Council (a fully political organ) approves the strategy – that is, the written document structured through strategy concepts and a Balanced Scorecard – at the end of May or in early June. The task of preparing the strategic plan is formally appointed to the Mayor, who either transfers this responsibility to the City's strategy team (consisting of upper middle managers) or then does this work with the City's top management team (TMT, which consists of senior managers). In the strategic planning cycle that I focus on in this study, the preparation of the draft of the strategic plan was done in the City TMT's weekly meetings. This study focuses on those meetings that took place between November and May.

The City TMT assembles every Monday at 8 am to discuss the issues at hand. In November, the TMT had decided to take time to formulate and update the City's strategic plan in those weekly meetings. The main issue was to polish the meanings of strategic goals and critical success factors that had already been written into the previous strategic plan but that had turned out to be difficult to implement. Ted[17] was the Chair of the meetings. He was aiming to formulate a strategy that would follow a more systematic route in the organization. In the first meeting in November, Ted introduced a picture (endnote) about how strategy implementation would ideally work. This was taken as a point of reference in the planning of the strategy, meaning that each strategic goal was examined through how it would be translated into concrete action within each department.

Besides Ted, TMT consisted of three department heads – Paul, Alice, and George; the Director of Finance, the Representative of Personnel, and the secretary of the TMT. The Strategy Officer, Richard, was responsible for the concrete writing of the strategic plan, and he and I were invited to the weekly meetings of the TMT to the extent that these meetings dealt with the formulation of strategy. I was allowed to record the meetings for the purpose of the research project. The department heads were participating actively in the discussion while others were not as active during the meetings.

The work began with an environmental analysis, after which strategic goals were formulated. After the directors had agreed upon these goals, they began to formulate critical success factors (CSFs). During the formulation of CSFs, the group realized that each department head should do some background work with their management teams so that the formulated CSFs would really guide the departments' actions. This background work was brought into the meeting that I use as a basis for my detailed analysis. This specific meeting – and the various serious breaks from the meeting agenda and the tension that resulted from these breaks – became important in understanding better what is at play *in situ* in strategizing.

6.5. First-order analysis of the micro-dynamics of a strategy formulation meeting

The meeting began the usual way. The TMT members discuss the content of the CSFs. Ted is introducing the topics and facilitating the conversation to follow the introduced agenda, but after approximately 10 minutes Paul takes issue with the introduced agenda. This event begins from Paul's first turn in the next extract:

Inconsistency

Ted	So to succeed in cooperation with other municipalities is critical (.) are there any other success factors to be found here?
Paul:	Hey (.) now (.) about these CSFs in general (.) we did agree last time that we would go through these and find CSFs from the department (.) didn't we (.) and if I understood right what we discussed last time about this (.) these should be now evaluated here (.) are these the core issues from this group's perspective taking into account the entire City (.) not so that these should work for everyone but so that you feel th: (.) those outside the Department (.) those are considered important also from the perspective of people outside the Department (.) 'n. (.) and then in the end the Council decides if these are important from their point of view (.) This way we would get there (.) there (.) that we could link the strategy and the budget.
Ted	Yea:

[17] The names of the participants have been changed to protect their identities.

Paul — And now I present a paper [stands up and walks to the whiteboard] (.) °or I mean a transparency that I presented in our management team (.) can you see it (.) I guess so (.) And you Ted (.) you made your suggestion that there would be City level (.) department level (.) profit center level (.) or what was it (.) and even more down (.) and the point was to draw from vision the strategic goals and CSFs and aims°

[*21 lines omitted, Paul goes through the transparency*]

Paul — ‹and I went through all of those [*the CSFs and target levels in the existing strategy*] and they are from two different worlds (0.2) all of those› (.) I went through also your [targets

Alice — [yes.

Paul — and those are from two different worlds.

Alice — Yes (.) I have also checked that out and they don't quite meet

[*28 lines omitted, participants discuss briefly about the consistency between the City's strategy and the department's strategies*]

Paul — So could you imagine the strategy document so that there would be the City level strategic goals and then CSFs from the Central Administration (.) and from the Departments of Social and Health Care (.) Education (.) and Technical and Environmental Affairs?

In this conversational sequence, Paul is building consistency between the City's strategy, the departments' strategies, and the budget. He has examined the (lack of) consistency in the annual targets, between the strategy and the budget, through existing documents and has come to a conclusion that those targets are from "different worlds." Paul also suggests that instead of formulating CSFs for the agreed strategic goals, they could draw the CSFs straight from the departments' strategies.

This action changes the frame in this strategy meeting. If we look at the first turn spoken by Ted, it is a continuum from the previous sequence. We find that the conversation was about defining the CSFs, but Paul's out-of-frame turn changes the conversation away from the definition of CSFs into a conversation about the structure of the strategy document. This is most evident in the last turn, where Paul asks, "could you imagine the strategy document…" The consistency between authoritative texts (the City's strategy, departments' strategies, budget documents) is built as an expectation, and thus as the new frame for the ongoing conversation.

Besides the change in the frame for the conversation, there is another interesting fracture in this sequence. When Paul takes a shift from someone who has been asked to propose content for CSFs to someone who defines the method of writing strategy, this shift could be understood as displaying the social roles in strategizing. These roles include the ones that discuss and debate the content for strategy and those that give a frame structure for the conversation. From the view of institutionalized meeting practices, the Chair usually sets the agenda for the meeting (Pomerantz & Denvir, 2007). When Paul expresses that "these should be now evaluated here (.) are these the core issues from this group's perspective" he is setting the agenda for the meeting and in a way stepping into the Chair's shoes. His bodily behavior also implies a shift in role as Paul stands up and steps away from the meeting table and presents his suggestion standing in front of the whiteboard.

What follows is that Ted is not willing to give up his rights to structure the formulation of strategy. The meeting continues by Ted taking out the picture (endnote) that he has introduced already in previous meetings and asking the department heads to work with

him through the reasoning “once and for all.” He writes down a strategic goal “the City’s finances are solid” and asks each department head to say with what kinds of CSFs they would try to reach the goal. In this sequence, the department heads are asked to fill in the CSFs according to the picture that Ted has presented. The next extract begins with Ted asking Paul to specify who would be the individuals in Paul’s department who would implement the CSF that Paul has suggested before this situation.

Strategically important

Ted	Yes, but if you have an organization that employs 250 individuals?
Paul	This concerns two profit centers.
Ted	So it means that we won’t harness the whole organization to take care of this issue but only a small part of it.
Paul	But do you mean that ‘the net cash flow’ should be diffused to every individual so that each of them would have some kind of an objective to keep the finances solid?
Ted	If it is so (.) then things start to happen, don’t they?
Paul	You mean that each individual has some kind of responsibility for income and costs (.) listen (.) that is not real life that (.) some have access rights to our accounts and some don’t (.)
Ted	Yes (.) but everyone has responsibility that they-
Paul	This becomes quite theoretical then.
Ted	Might be so (.) or it might feel like that at first.
Alice	Can I ask if we had the City Board’s night school on Monday?
Ted	Yes
Paul	Next week Monday.
George	I would have asked that if we follow Ted’s picture (.) do you really expect us to create something there during one week?
Ted	No no (.) I am not expecting that (.) but I wanted to turn your minds towards this notion that if we have these wonderful strategic goals (.) we have these great goals there (.) but then after that when we begin to examine how much it has an effect on the organization (.) and we find out that it affects only 5% of our organization (.) it means then that 95% of our organization is doing some other important things but those are not considered strategically important (.) that is what I have tried to pursue here.

Ted’s question formulation, as well as what conversational analysts call the ‘third turn’ of the question-answer-comment triplets, reveals that Ted is not asking a ‘real’ question in the sense that Paul’s answer would change Ted’s state from ignorance to knowledge, but in a way Ted is displaying an ‘exam’ question (Searle 1969: 66 in Heritage, 1984: 284) to see if Paul knows that the CSF is not committing the whole organization but only a small part of it. What follows is that Paul questions the aim that the CSF should guide each individual in the organization, drawing on his practical knowledge by claiming that Ted’s aim is not “real life” and it is too “theoretical”. Alice and George team with Paul by questioning whether there is enough time to formulate the strategy according to Ted’s plan. This teaming is apparent explicitly in George’s turn, when he

categorizes the department heads as part of the team with the first person plural “us”, which excludes Ted (cf. Kangasharju, 1996: 304).

Why does this disagreement and alignment emerge in the discussion? Ted quite directly spells out the reason in the last turn of the previous extract. Ted explains that, through the picture, he is trying to find out if the employees in the organization are doing strategically important work. In a way, the picture becomes, in this situation, an *actant* (cf. Fairhurst & Cooren, 2009) that is deemed to build a new kind of social-moral order in the organization, which is the systematic management of each individual. The framing of the action in relation to the picture could also be seen as threatening the *faces* (Goffman, 1959) of the department heads. When Ted uses this tool to force the department heads to be explicit about who in their organization is acting according to strategy, he is in a way displaying his scepticism that the work in the departments is off target. Simultaneously, Ted is giving the strategy a role in the local achievement of authority when he asks the department heads to manage the individuals according to it. It is not then the department heads who would guide the operations, but the strategy.

If the strategy was given such an authoritative role, it would be even more important to define what is written in it. So the meeting continues again with the examination of the CSFs according to the picture presented by Ted. But the negotiation of roles and power relations is not over yet. Let’s see further what happens:

Hodgepodge

George	The arrows should also point in the other direction (.) this won’t go like you said (.) you only pour this over the organization (.) if this is a dynamic design (.) we need to have communication between different levels (.) so there should be arrows in the other direction as well (.) then things begin to happen.
Alice	Yes (.) it is not like that (.) the world is not as logical.
Ted	Really Hahahahaha
Alice	It’s not
Ted	Okay (.) I admit it.
Alice	Hahahaha
George	I found this kind of (.) if we want this (.) here we can find theory that we can use to refine this design.
Ted	I’m sure that there is (.) and I haven’t read that theory (.) so this is only (0.4) let’s find out where we get to with this (.) if we take-
Paul	The sooner you forget that hodgepodge the better we can get a grip on this work.
Alice	Right!
Ted	Yea: I guess we can lose this hodgepodge at some stage but I am not giving up yet (.) let’s take a more complex one (.) what was it- (.) you Alice discussed the value co-creation earlier?
Alice	Yes (.) let’s take something from there.
Ted	Okay (.) what do we have here?

Alice	What about the capitalization of location and expertise?
Ted	Okay.
Paul	Yes.
Ted	What have you each located there?

What this extract reveals is that George turns the conversation back to Ted's picture and pedagogically instructs Ted how the picture should have been drawn. This implies that George defines Ted's role as someone who needs instruction in strategy formulation and introduces himself as a specialist. Alice's sarcastic comment about the world not being as logical as Ted has implied further questions Ted's professional role as a strategist. Ted's response "really" with laughter implies that Ted has caught Alice's meaning, although it was presented with a sarcastic tone. This is Ted's way of changing the tone of the conversation and answering the critique in an unserious way to avoid getting into the foolish role that others have constructed for him. However, George carries on the talk about the 'theory' and Ted has to return to a serious tone and to spell out his incapacities by admitting he has not read the theory. By admitting his incapacities, that is, not being as specialist in the theory of strategy as requested, Ted 'pays for his sins' and tries to return to the agenda by suggesting "let's find out where we get to with this". With this repair, Ted aims to shift his role from out-group to in-group by taking distance from what he is doing. In a sense, Ted is building a new social role for himself and taking the critique as a building block. Instead of presenting himself as a specialist who knows exactly how the introduced method works, he introduces himself as a participant who is trying to "find out" how the method works.

However, the alignment of George, Alice, and Paul is re-established when Paul and Alice join in the critique of Ted's agenda by suggesting that he should forget the hodgepodge. Ted also recognizes the re-established department heads' alignment when he positions himself in opposition ("I am not giving up yet"). We can also see that Ted is mitigating his agenda ("this is only", "I guess we can lose this hodgepodge"). These mitigations are some of Ted's moment-by-moment reassessments and realignments to move his social role from the problematic frame of being a specialist in strategy theory to another frame. With these mitigations, Ted is establishing a new meaning for the activity, which is spelled out again in the next extract from this meeting.

Strategy Exercise

Ted	And what I am doing here (.) and <u>don't</u> think that I am going to give up soon (.) don't you (.) don't er
George	I just remembered that I have some material for you=
Ted	=Yeah=
George	=that (.) if you don't have any [theory stuff
Paul	[reading
Ted	I still hold on to this but these are not (.) not carved in stone (.) but what I am trying (.) to do with this tool (:) let's say that first to learn it myself that (.) <u>if we have</u> 6000 people working in this organization (.) we should be able to guide those 6000 individuals with the strategy (.) and if we guide with the strategy only 5% of the population, we will lose the power of 95% (.) or then (.) we explain that they are doing beneficial and important <u>work</u> (.) but that is not according to the strategy (.) something is not right then (.) THESE are now extreme examples and exaggerations (.) you know (.) I know that it is not quite so (.) rather there is a narrow mismatch in

thinking (.) but that is why I want to do this exercise with you (.) but how is it (.) do we have (1.0) should we go this through once more.

Ted spells out his agenda again and stresses that he is not willing to give up, although the department heads are opposing his method. However, George introduces his helping hand again by spelling out that he could bring Ted some material about the theory. Ted entirely passes over what George says and again defines his agenda. It is interesting how the definition reveals the face-work that is done in this interaction. Ted mitigates his agenda by several lexical choices – "not carved in stone," "I am trying to do," "first to learn it myself," "these are extreme examples and exaggerations" "it is not quite so," "narrow mismatch in thinking," – and builds a new frame for the strategy formulation, which is established as an *exercise*. Several rhetorical resources are also at play – conditional clauses (if), first person plurals (we), numeralizations, and the anecdote – through which Ted is building a sense of context that is operative for the local organization of this strategy formulation interaction. In fact, the repeated anecdote of the organization losing the power of 95% of its employees is one of those powerful anecdotes that Ted spelled out during the strategy formulation process through which he was aiming at to keep the department heads on board and to legitimate the work that he requested them to do.

The last extract from this meeting further reveals what is at play in these sequences of interaction. The situation begins with Paul's suggestion that Ted should see the departments as different business units.

Take it easy

Paul:	Hey look Ted! Maybe it would be helpful if you'd think that we are like individual business units all of us.
Ted:	Yeah?
Paul:	We are business units just like our Energy Company and the Water Supply Corporation (.) just the same. We are such different departments, each of us, that it is difficult to (:) It is as difficult to bring us together as waste management, water, energy, and finance. So for them shared strategy is as difficult as for us. But we do share the City's strategic goals, don't we?
Richard:	Yes you do.
Paul:	And those should be the same for all of these City-owned corporations.
Richard:	Exactly.
Alice:	And for the City alliances as well.
Paul:	Which alliance?
Richard: ((*choir*))	But although those are the same it does not mean that all of them
Ted:	But, my dear friends, what I was asking, if we have a shared strategic goal that ((*spells out one of the decided strategic goals, lines omitted*))
Paul:	Yes.
Ted:	And then one of our department heads says that it is not working for us-
Paul:	We can't do much about that. I said that what we CAN do is that we ((*explains the way he sees how the strategic goal fits his department, lines omitted*))

Ted:	But this specific strategic goal, this goes through the whole organization. Either this is the one or then ((*choir*)).
Richard:	It is.
Paul:	Don't get fixated on that. Of course it is.
Richard:	Exactly.
Ted:	Or then it is not. ((*choir*))
Alice:	But it doesn't look the same for everyone.
Ted:	I see.
Alice:	And for some it has a bigger meaning than for others.
Richard:	Exactly.
Ted:	Well, that is true too.
Alice:	For some this goal is not linked to money. If we look at this- ((*choir*))
Paul:	For us it is exactly about money.
Alice:	Well, for example, teaching is not linked to money ((*choir*))
Paul:	There is a strong financial view behind this goal.
Ted:	But this is exactly what I am trying to say, that we can't have this kind of strategic goal. Or then it is not a City-level strategic goal if someone in the organization could totally disregard it!
Paul:	I agree.
George:	Me too.
Ted:	I mean that it can have less influence on some than on others, that I can understand. But it has to be significant for everyone.
Richard: goals, right?	Yes, and in principle all of the departments have already accepted these
Ted:	Yes.
Paul:	And we have already drawn critical success factors from them.
Ted:	So there shouldn't be any problem then.
Alice:	Well the closest one is this goal. Ha ha ha
Paul:	There's no problem with this. ((*choir*))
Alice:	No, there is not.
Ted:	So let's take it easy then.

Paul's pedagogical instruction to Ted to consider departments as individual business units is a continuum to the critique of Ted's agenda to build a shared strategy for the City organization. Through this instruction, Ted is again in a position where he has to defend his agenda. So Ted turns the discussion back to the commitment to the shared strategic goals. He animates, in fact, Paul's words when he spells that "one of our

department heads says that it is not working for us", which is a narrative that sets the meaning of Paul's action against a culturally based model of role assumptions; the assumption here being that the department head has a right and an obligation to work to respect the terms of the strategy. It is no wonder that Paul quickly begins to defend himself and define what his department "CAN do" to implement the discussed goal.

Ted is not thoroughly convinced and repeats his accusation that "either this is the one or then," which leads to Richard's and Paul's justifications 'it is, it is'. But Ted hesitates to accept this justification and says "or then it is not," which results a sequence where participants begin to discuss the extent to which the strategic goal has a meaning for each of them. This discussion reveals that there are different views on the meaning of the goal – for Alice, it is not necessarily about money; for Paul, it definitely is. So Ted confronts the participants by forcing consensus through questioning whether the discussed goal can be the City-level strategic goal if it doesn't commit everyone. This time the alignment turns to favor Ted, when Paul, Richard, and George respond favorably to Ted's assessment. So Ted suggests that "there should not be a problem then" to which Alice laughs and states that the closest problem could be the one that they are discussing right now. But Paul downplays this sarcastic comment, which leads Alice to display that there is consensus. Thus, Ted concludes that "let's take it easy then".

This whole sequence reveals that besides the culturally based role assumptions, there are also at play here the organizational policies and the more general institutional constraints that strategy-as-a-whole is about. As Taylor and Robichaud (2007: 10-11) explain through the concept of metaconversation, each individual's talk reflects their conversational skills, interests, and face work, but also more institutionally based controls - a justification of their particular community of interests as well as the policies of the organization as a whole. I will come back to this in the second-order analysis below.

6.6. Second-order analysis of the micro-dynamics of a strategy formulation meeting

In the first-order analysis, I explained the linguistic resources at play in the strategy formulation. This second-order analysis is meant to answer the question "So what?" through re-/de-constructing the interaction and discussing what this interaction implies. The local achievement of participants' interaction shows that 'being a strategist' is a complex phenomenon. On one hand, it is an appointed position, being a senior manager or CEO responsible for formulating a successful strategic plan for the organization. In this case, the responsibility was appointed to the TMT and more precisely to Ted, who was chairing the strategy process. The responsibility meant that the TMT had to engage in interaction, which involved normative strategizing practices: environmental analysis, formulation of strategic goals and CSFs, and so forth. But within these normative meeting practices, the actors' primary concern was the accountability of what they do. For department heads, the accountability dealt on one hand with consistency between the budget and the departments' strategic plans as well as the City's strategic plan, and on the other between specific strategy concepts and theories. For Ted, the accountability was about clarifying the strategic plan so that the employees of the City organization would do strategically important work. According to Ted's account, this meant that each department head had to specify how their employees operationalize the strategy. This request resulted in a tension between Ted and the department heads, which led to a questioning of Ted's authority through contesting Ted's right to act as a specialist in strategizing. This contesting drew heavily

on *alignment in disagreement* (cf. Kangasharju, 2002), which provided department heads with an alliance to question and define Ted's social role.

The department heads' alignment built a context for the conversation in which strategic authority was based on conversational resources that Ted didn't have access to. What followed from this contextualization was that Ted had to claim the positive social value for his face through mitigating the agenda that he was pursuing and through building a new context for the interaction to enable the work to continue. Ted made moment-by-moment reassessments and realignments to move his social role from the frame that he was situated in to another frame. The new *learning* and *exercising* framing built a context for the interaction that allowed the work to continue because it downplayed the knowledge and centered participants' collective learning. In a way, this new framing had more enduring implications, transforming the activity from 'being a knowledgeable strategist' into 'learning to become the strategist'.

Another layer to this interaction was the negotiation of professional identities and power relations, which was a subtext that shaped the way the strategizing unfolded. The commitment and consensus that constituted a problematic issue in the interaction implies that there were more institutionally based constraints in this discussion. In fact, what this negotiation was about was spelled out by Ted in the interviews that I did as part of the research project the next autumn, after the strategic plan had been approved. We were discussing more broadly about strategic management in the organization, but I also asked him what his after-thoughts were about the strategy formulation meetings that I had observed. This is an excerpt of his description of his thoughts, which reveals something about the subtext:

> It was that one stage where I was almost entirely worn out, when the department heads questioned the strategy process. At that stage I had, you know, I had stopped to think 'wait a second; how should we carry on from here'. [...] I think what happened was that the department heads felt that I was taking something away from them. Something that really is their tool. Or in other words, I think that they felt that the department's strategic plan was a key tool for the management of the departments, and the resistance arose because of that.

This interview excerpt in a way confirms what we can already see in the snapshots of a strategy meeting. The story of the organization-as-a-whole threatened the professional identity of the department heads as the experts who define and determine their version of the strategy. As Taylor (2011: 1288) explains, people feel a proprietary interest in defending their story against alternative appropriations because strategy is, also for them, both *practice* that is a professional and enforced domain of understanding, and *praxis* grounded in the actual activities of an organization. This is also what Ted recognized. However, what makes this case very interesting is that this tension is not between the superiors at the head office and those who are targeted by the strategy, as Taylor (ibid.: 1287-1288) argues, but within the TMT.

6.7. Conclusion

In the introduction to this study, I argued that this study extends specifically the literature that examines strategists' linguistic and rhetorical resources to influence the strategic planning processes. Although this has been a very particular study, an analysis of one specific meeting, the analysis shows that the parties of the TMT had to orient themselves to each other's capacities and demands and had to fulfill certain obligations to sustain the interaction. This provides us with an interaction-approach on the constitution of 'being a strategist' and shows that this role is maintained through face-saving practices and the management of involvement obligations. Face-saving practices are, for example, those mitigating or "sin-paying" practices that resolve the constituted tensions. The management of involvement obligations is the constitution of those

framings that constitute intersubjectivity among those involved. In a way, although the request for 'being a strategist' has to do with knowledge, this analysis shows that 'being a strategist' has to do with situational rhetorical resources that the actors are able to employ to solve tensions.

This micro-level analysis of one specific meeting sheds light on how 'being a strategist' is constituted in and through communication. Although strategy discourse provides interactional resources for the actors involved, I showed that the discursive power of these resources have to do with individuals' experience of the situation and the context. The specific authority of strategy discourse was displayed as a voice of the other. However, although this voice was powerful in constituting the 'right' understanding of what strategy is, and thus worked as a knowledge basis for 'being a strategist,' this role was not fixed but fluctuated in conversation, and there was the possibility, under certain conditions, of creatively rearticulating and also transforming it.

Thus, this study contributes to the literature on how language is influential in constituting the actors' reality in strategizing (Samra-Fredericks, 2003; Rouleau, 2005; Jarzabkowski & Sillince, 2007; Mantere & Vaara, 2008; Jarzabkowski & Balogun, 2009; Rouleau & Balogun, 2011). In a very recent special issue on communication, organizing and organization in the Journal of Organization Studies, Taylor (2011) argued that when strategy is seen as constituting an organization-as-a-whole, those parties who consider strategy as an important story for their praxis and practice are downplayed. I think this is a very important notion, but to see it as a problem attached to organizational structures and levels is downplaying the fact that superiors at head offices and parties in a TMT are also individuals participating in narrating differential stories. And strategy may be problematic even within a TMT because a strategy is an authoritative text that ascribes accountability also to superiors in the organization.

Furthermore, this study supports the findings of Samra-Fredericks (2003) who showed how the linguistic skills of one specific manager to constitute strategic weaknesses were influential to the extent that the loss of credibility of another participant resulted in him eventually being fired. This study examined also how someone's face and credibility was threatened but in this case, 'the strategist' was an individual who was able to regain authority through linguistic skills to build a common ground for those involved in strategizing. In this sense, I argue that the results of this case imply that strategizing involves superiors' sensitivity to solve tensions, which are linked to participants' professional roles and power relations.

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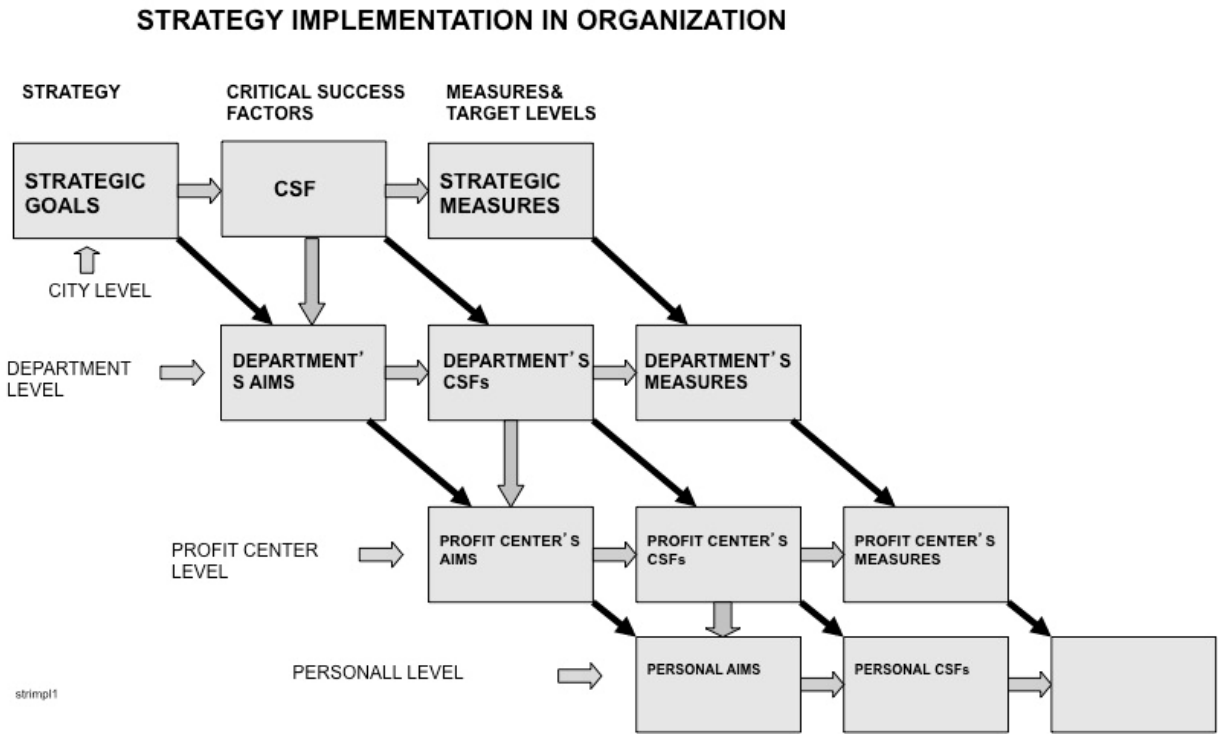
Endnote

The introduced picture in the city TMT's strategy meeting



7 SOCIOPOLITICAL AND TEXTUAL AGENCY IN STRATEGY FORMATION[18]

7.1. Introduction

Strategy, as traditionally considered, is all about agency. The word embeds an implicit assumption of intention, of purposefulness, of the capacity to freely choose one's orientation. Conventionally, strategy has been seen as a means through which managers can exercise power in organizations through rational planning (Ansoff, 1965), strategic choice (Child, 1972) or the management of resources and capabilities (Felin & Foss, 2005; Foss, 2011). However, rather than being omnipotent actors, managers have to negotiate with and work with others. This involves organizational politics among top managers (Pettigrew, 1973; Mintzberg & McHugh, 1985). Middle managers' actions or lack of action also greatly influences outcomes (Balogun & Johnson, 2004; Wooldridge & Floyd, 1990; Mantere, 2008). Moreover, organizational members and other stakeholders may or may not support the strategic ideas presented (Ford, Ford & D'Amelio, 2008; Thomas, Sargent & Hardy, 2011). Previous studies have thus highlighted the central role of politics when exercising agency in strategy formation.

However, less is known about the ways in which this agency is mediated or accomplished in and through communication in organizational strategizing. This is the case even though we know that strategies are formed and implemented only through conversations (Westley, 1990; Samra-Fredericks, 2003; Spee & Jarzabkowski, 2011) and narratives (Barry & Elmes, 1997; Boje, 2008; Fenton & Langley, 2011), implying that there is no shared strategy without communication. Strategic discourses themselves also have a fundamental impact on who can act as a strategist and on what terms, thus impacting the agency of the various actors involved (Knights & Morgan, 1991; Mantere & Vaara, 2008). Moreover, strategic plans that reify strategic ideas play a crucial role in our mediatized society in directing the actions of managers and other organizational actors, often leading to unanticipated interpretations and outcomes (Kornberger & Clegg, 2011; Spee & Jarzabkowski, 2011). The issue of agency is thus only partially understood in organizational strategy formation. In particular, there is a paucity of knowledge of the ways in which the social actors' agency is enabled or constrained by discourses that are mobilized and how the work on strategy texts impacts this agency.

Hence, to further our understanding of agency in strategy formation, we examine the ways in which managerial action, discourses and texts together influence strategy formation. In this view, *sociopolitical agency* is the way in which top managers and other organizational actors impact strategy formation. Following the idea that discourses play a central role in strategy (Knights & Morgan, 1991), we focus on the ways in which discourses enable or constrain the sociopolitical agents strategy formation. To distinguish the specific effects of texts, we define *textual agency* as the capacity of texts to become important actors in organizational processes, for example as directive texts or obligatory passage points (Cooren, 2004). The key theoretical point is that sociopolitical and textual agency are interlinked and together constitute strategic agency, i.e. the exercise of agency in and through strategy formation.

In this paper, we draw on a longitudinal study of strategic planning in a Nordic City Organization between 1990 and 2011 to illustrate the multiple forms and sources of agency that explain the evolution of the activity of strategic planning and its role in the

[18] This essay is written with professor Eero Vaara, Hanken School of Economics, and professor Ann Langley, HEC Montreal.

City's action. Our processual analysis elucidates the ways in which discourses are mobilized and strategy texts produced to serve the interests of managers and other organizational members. However, we also illustrate how strategy discourses and strategic plans can exercise power over social actors. On this basis, we develop a model that explains the interplay and mutual constitution of sociopolitical and textual agency in strategy formation. This helps to better understand some of the central discursive dynamics involved. In particular, our analysis demonstrates how managers and other actors invest in strategic planning to increase their own agency, but how increasingly elaborate planning practices and the texts themselves also limit the power of managerial and other actors. Our analysis also highlights the dynamics of centering and decentering, i.e. how actors such as top management attempt seize control of authoring, but how other actors by their engagement increase polyphony. Furthermore, we demonstrate how in these cycles the clarity of strategies contributes to their performative power, but how various interpretations tend to increase ambiguity over time. Thus, our analysis helps to explain some of the reasons for the unintended, unpredictable and even undesirable outcomes of strategic planning.

7.2. Theoretical background: Agency in organizational strategy

Agency is a central issue in social and organizational research – the analysis of which requires ability to unravel its various aspects in the context in question. It can be defined as "[t]he temporally constructed engagement by actors of different structural environments – the temporal-relational contexts of action – which, through the interplay of habit, imagination, and judgement, both reproduces and transforms those structures in interactive response to the problems posed by changing historical situation." (Emirbayer & Mische, 1998, p. 970). In most studies of agency, the focus is on the human social actors such as managers – who are then enabled and constrained by structures such as strategic discourses. However, some streams of theory have also focused attention on non-human actors due to their central role in mediated and technological organizations (Latour, 1987; Callon, 1986). In the following, we place the human-social agency – in our case sociopolitical agency – into context by focusing attention on the power of discourses that enable and constrain organizational actors' actions. Moreover, given the central role of strategy texts in strategy formation, we focus special attention on their role in strategy formation in the form of textual agency.

Sociopolitical agency is crucial in strategy and strategizing. The traditional way to deal with sociopolitical agency in the context of strategy is to adopt a political model (Allison, 1971; Pettigrew, 1973; Mintzberg & Waters, 1985; Hardy, 1995) in which it is interacting individuals with different sources of power, values and interests whose intentions and actions structure and determine what the organization does. From this perspective, organizational strategy is the result of negotiations among members of a coalition, conventionally seen as represented by top management (Mintzberg & McHugh, 1985).

Recent research has also focused on the role middle managers vis-à-vis top managers (Floyd & Wooldridge, 1996, 2000; Ketokivi & Castaner, 2004; Mantere, 2005, 2008; Jarzabkowski & Balogun, 2009). This research has highlighted the importance of as well as problems and challenges in middle manager participation. For example, Ketokivi and Castaner (2004) provided evidence of the positive impact of middle management participation on strategic planning. Mantere (2005, 2008) has elaborated on the ways in which middle managers may or may not become "champions" or "strategists." Regnér (2003) has demonstrated how top management's strategizing "at the center" is more deductive while managers in the periphery have an inductive approach. Jarzabkowski and Balogun (2009) have in turn stated that participation is much more than simply putting middle and top managers together to talk about

strategy; it involves various forms of participation and levels of engagement. Finally, others have also examined resistance to top managers' initiatives (Ford et al., 2008; Thomas et al., 2011). For instance, Ford et al. (2008) argue that resistance is not mere opposition, but can also be seen as exercise of agency. Thomas et al. (2011) have in turn examined how top management's attempts to engage others depend on the communicative practices, form of dialogue and power-resistance dynamics. While all this action may involve other aspects of behavior or cognition, we emphasize the role of communication in the exercise of sociopolitical agency: articulation of ideas in and through conversations (Samra-Fredericks, 2003, 2005; Spee & Jarzabkowski, 2011) and narratives (Barry & Elmes, 1997; Fenton & Langley, 2011).

A more radical way to examine the agency associated with strategy is to focus on the ways in which structure determines organizational action. From a post-structuralist perspective (Knights & Morgan, 1991; Ezzamel & Willmott, 2008), "discourses," or bodies of knowledge and thought, in this case about strategy, establish subject positions with modes of legitimated action that channel the activities of individuals, normalizing certain types of power relationships and forms of action. In this sense, widely spread discourses about strategy (e.g., in our case, New Public Management discourse) or more specific institutionalized practices associated with it (e.g., Balanced Scorecard) greatly affect the activities of individuals and organizations. In their seminal work, Knights and Morgan (1991) argued that the overall discourse of strategy has the following kinds of power effects: it provides managers with a rationalization of their successes and failures, it sustains and enhances the prerogatives of management and negates alternative perspectives on organizations, it generates a sense of security for managers, it sustains gendered masculinity for male managers, it demonstrates managerial rationality vis-à-vis the environment, it facilitates and legitimates the exercise of power, and it constitutes the subjectivity of organizational members as particular categories of persons who secure their sense of reality by participation in this discourse (pp. 261-270). Grandy and Mills (2004) have gone as far as to suggest that strategic discourses create a hyperreality that has power over managers rather than vice versa.

More recently, researchers have elaborated on how strategic discourses impact the ability of managers or other actors to engage in strategizing (Ezzamel & Willmott, 2008; Mantere & Vaara, 2008; McCabe, 2010). Mantere and Vaara (2008) distinguished between discourses that seemed to impede participation in strategy work – 'mystification' (obfuscation of organizational decisions), 'disciplining' (use of disciplinary techniques to constrain action) and 'technologization' (governance of technology to limit degrees of freedom) – and those that promoted participation – 'self-actualization' (ability of people to define objectives for themselves in strategy processes), 'dialogization' (integrating top down and bottom up approaches to strategizing) and 'concretization' (establishing clear processes and practices in and through strategizing). Laine and Vaara (2007) highlighted how middle managers and organizational members effectively resisted new top-down forms of strategic development by mobilizing alternative discourses and distancing themselves from these discourses. Ezzamel and Willmott (2008) have in turn demonstrated how actors such as accountants can resist imposed discourses by means such as slowing down tactics, being less cooperative, and being resentful.

In a related stream, other researchers have focused not only on language, but how discourses and socio-material practices together enable and constrain organizational actors. This is the case with genres that are repertoires that actors can and even must use in strategy making (Cornut, Giroux & Langley, 2012; Levina & Orlikowski, 2009; Orlikowski & Yates, 1994). For example, the ability to use of PowerPoint may be crucial in strategic planning (Kaplan, 2011).

We argue that special emphasis has to be placed on strategy texts as articulations and reifications of conversations (Spee & Jarzabkowski, 2011) and narratives (Fenton & Langley, 2011). Following Cooren (2004), we maintain that objects, and in particular texts such as strategic plans may also exert their own form of agency. This perspective that we label *"textual agency"* builds on the ideas originally developed by Latour (1987, 1992) and Callon (1986) in the context of Actor Network Theory. In this view, non-human entities (including objects, texts, ideas) can "do" things (i.e., are agents) that contribute to what occurs, constraining and enabling human action while at the same time being mobilized by humans to explain and to mediate their own actions (Cooren, 2010). Although produced by humans, texts have the interesting characteristic that once produced, they can be transported over space and time to be consumed in various ways. Many organizational texts have an important role to play in channeling organizational action – e.g., rules and regulations, organizational charts, and schedules structure individual activities (Callon, 2002; McPhee, 2004). We suggest that strategic plans can also become 'agents' to the extent that they contribute to determining what people in organizations do, which of course, is inherent to the definition of what a plan actually is (a guide for action). This includes both the semantic content of the plans (e.g., what is being stated) and the pragmatic importance of these plans as objects that need to be referred to and the existence of which greatly influences how strategizing can take place. We will later accordingly distinguish between 'performative' and 'referential' effects.

Sociopolitical and textual agencies are interlinked and together explain the constitution of strategic agency. Little is known, however, about how exactly these agencies play out over several cycles of strategic planning. This leads us to formulate our research questions as follows: *How do sociopolitical and textual agency influence strategy formation? How does their interplay explain the dynamics of strategy formation processes over multiple iterations of strategic planning*?

7.3. Methods

The data for this paper were gathered in a longitudinal case study of strategic planning in a Nordic City Organization (1990-2011). Longitudinal case studies are an important means to examine the dynamic and ambiguous nature of strategy work (Van de Ven, 1992; Langley, 2007), and the social and discursive interactions involved (Rasche & Chia, 2009). During our research project, we discovered that strategic planning and implementation happened in and through extensive discussion and revolved around documents – especially official strategic plans. In fact, one of the key decision makers made an illuminative comment in her Facebook status: *"Why does everything have to be written and tabulated? Can't people agree on anything anymore, I mean on ANYTHING, without documentation?"*

Our analysis of the time between 1990 and 2005 is based on retrospective analysis, but we followed strategic planning between 2006 and 2011 real time. Our empirical material comprises observations of strategy meetings and informal conversations, semi-structured interviews, and all kinds of documents, and other data such as personal diaries (Table 5).

Table 5 Empirical data for the examination of sociopolitical and textual agency

Year	1990-2005	2006	2007	2008	2009	2010	2011	Total
Interviews		7	29	30	1	24		91
Meetings		3	62	9	37	30	6	147
Documents	x	x	x	x	x	x	x	
Power Point slides or other presentations	x	x	x	x	x	x	x	
Performance appraisal interviews						5		5
E-mails			x	x		x	x	
Diaries / Personal documentations	2		1					3

Altogether we observed 141 meetings dealing with strategy, in practice covering most of the key meetings of strategic planning between 2006 and 2011. We focused on the City's Executive Group, the City Board, the City Council, and the Executive groups of each Department. In addition, we attended different seminars in and around the organization where strategy was the topic of the discussions. These included away-day strategy seminars, seminars of the executive group and different departments, and the seminars of various subject committees. Apart from a few exceptions, all these discussions were recorded and transcribed. We also shadowed teamwork of those employees who were implementing strategy. Furthermore, we participated in quite a few ad hoc working groups as well as in other informal dinners, lunches, and coffee table conversations.

We conducted 91 interviews. In practice, these interviews covered all the central decision-makers. We interviewed 35 individuals, of whom 29 twice and 17 three times. The interviews lasted from 45 minutes to 2 hours and were all recorded. We followed a 'storytelling' approach with the use of a semi-structured interview guide. These interviews were crucial to be able to understand the context and subtext of the actual strategy process, but also to comprehend how the participants had experienced specific events in strategy work. With only a few exceptions, all these interviews were recorded and transcribed.

We also gathered a great number of strategic plans and their drafts, memos, presentations, implementation reports, media texts, evaluation reports and so forth. We were fortunate to get access to the emails of a few key people and to be handed a few personal diaries (Balogun & Johnson, 2004). These data provided interesting additional material illuminating people's genuine personal experiences at various stages of the strategic planning process. We were also granted access to observe and record 5 performance appraisal interviews, which were important sites of strategy implementation.

Our processual analysis proceeded in stages. We first constructed a detailed mapping of key events and actions (see Table 6). On this basis, we identified and focused on four time periods and corresponding cycles of strategic planning.

Table 6 Key events in strategic planning 1990-2011

Strategic planning in the City Organization	
1990	Strategic planning is introduced by the City planning bureau.
1995	The Municipality Law: Cities have to include obligatory functional targets into the budget document.
1995	'The strategy program' is written and approved in the City Council.
1996	Election year.
1997	The new Chair of the City Council spells out the role of the City Council as 'the strategic and political leader' The City Council approves the 'Strategic Plan.'
2000	Election (the Chair of the Council is re-elected).
2001	The Chair of the Council introduces BSC, and scorecards are included in the strategy document. The City Council approves the 'Strategy.' An obligatory functional target to develop City's management system is included into the scorecards.
2002	The management development committee suggests in their report that the City's management is restructured into three Departments: the Department of Social and Health Care, the Department of Technical and Environmental Affairs, and the Department of Education and Culture.
2003	A new Mayor is elected and three Departments Heads appointed.
2004	Election year. The Mayor and his team see strategy as a means to change how the services are produced and operations organized in the City. The Mayor and new CEOs begin to prepare a new strategy for the City with the help of a consultant firm specialized in New Public Management. The Mayor and his team introduce the residents' 'self-responsibility,' which becomes the strategic punch line.
2005	The Mayor and his team launch an extensive participatory strategic planning process. The new City Council is provided with a strategy draft including the new strategic punch line "inhabitants' self-responsibility is increased."

	The Council revises the punch line in the final stage of the strategic planning to be ”the inhabitants’ *activeness* is increased” Each department launches a strategy process.
2006	The top management team decides to ‘clarify’ the strategy to avoid misinterpretations and unintended outcomes. The Mayor resigns, and the Deputy Mayor takes charge of the strategic planning process.
2007	The update grows into an extensive planning process involving various stakeholders. The punch line of ’self-responsibility’ is introduced again for the City Council. This time the Council settles with the framing ”the inhabitants activeness to take ’self-responsibility’ is increased.” Top management team experiences a backlash in terms of new cautiousness in the final formation of strategic objectives at the end of the planning cycle. Increasingly elaborate strategic planning in various parts of the City organization. A new Mayor is elected.
2008	Election year. Major organizational changes. A Director of Development and a Chief of Strategy are hired. Scenario planning is introduced. The Mayor and his team decide that the City has only one official document that is called ’the Strategy.’ All other documents are something else: operationalization plans, policies etc and cannot include competing visions, missions, strategic goals, and success factors.
2009	The role of the new City Council is emphasized, and the interaction between City Administration and the Council increases. The City’s new vision is to become ’the Green City.’ The linkage between strategy document and ’pay for performance’ experimented in the Department of Technical and Environmental Affairs.
2010	The Chief of Strategy suggests that the strategy is not updated every year but the next updating would take place in 2011. Top management team launches the updating process in September. The key participants request more focused and clarified strategy.

We then focused on how influence was exercised in strategic planning processes. We zoomed in on key people's ideas and intentions, how they were received, and the impact that they had. Special attention was focused on the ways in which people's experiences of previous planning cycles impacted their subsequent actions. We also examined the various discursive frameworks that structured the conversations and organizational practices more generally (e.g., general strategic planning practices, Balanced Scorecard, scenario planning). We focused attention on the ways in which these frameworks guided the discussions over the City's strategy. We also examined the thematic discourses (e.g., "individual responsibility" and "Green City") that played a central role in discussions. In addition, we carefully analyzed key features in the strategic plans and other important texts, focusing on how their versions changed over time and how key people then received these plans. This led us to concentrate on both their performative effects (the goals, decisions and guidelines) and referential effects (the way the plans were referred to in strategy discussions). We coded the empirical material accordingly. All this led to a nuanced understanding of the role of discourses in general and sociopolitical and textual agency in particular.

On the basis of this detailed analysis we concentrated on the dynamics of strategy formation processes. This led us to focus attention on the interplay and mutual constitution of sociopolitical and textual agency. We then zoomed in on three types of dynamics: increasing vs. decreasing agency, centering vs. decentering, clarity vs. ambiguity as explained below.

7.4. Sociopolitical agency and textual agency in strategic planning in the city organization

In this section, we provide an overview of the role of sociopolitical and textual agency in strategic planning during four periods.

7.4.1. Period I (1990-2003): The introduction of strategic planning

Medium- and long-term plans had been made in the City Organization at least from the 1960s. However, in the 1990s the City's key administrators and political elite introduced the discourses and practices of "strategic management" to the City organization. In particular, strategic thinking was linked with the City's budget preparation and the financing of most important projects. The City administrators wrote the first strategic plans, but the overall institutionalization of strategic planning in the City took place after 1997. From this year on, a new strategy was crafted in a Council's strategy seminar in the beginning of each term (every four years), and then updated every year. Table 7 below summarizes the central discourses, the role of central actors in strategic planning (sociopolitical agency) and the impact of the strategic plans (textual agency).

Table 7 Sociopolitical and Textual Agency in Period I

		Findings	Interviews	Documents
Discour-ses	Frame-works	Strategic planning discourse gained ground	"I think it was around 1993, when the first strategies were written for the City. I was significantly involved then and I tried to develop strategic planning in addition to my own job as a Chief of [the Name of the Bureau] because it seemed that there wasn't much know-how about strategic planning at that time in this City." Key administrator (29.6.2006)	The first strategy documents comprised an environmental analysis, mission, vision, strategic goals, and strategic projects. Exact measures were not written into those documents.
		The BSC was introduced to further systematize strategic planning and management	"Together with the deputy chair of the City Council, we introduced BSC to the key administrators. We explained that the setting of targets and monitoring stay often merely remain as beautiful sentences and we need something with what we can concretize those goals. And BSC could be that kind of a tool with which we could monitor more concretely the realization of the strategy." The Chair of the City Council in 1997-2004 (8.3.2007)	Scorecards were included in 'The City's strategy' (7.5.2001). These cards consisted of CSFs, measures, and target levels.
	Themes	Focus on competitiveness in specific sectors and targeted investments	"The commitment to invest in issues such as the university consortium and the environmental expertise grew through strategic planning processes. And when we decided to build this new science and business park we decided that we need a spearhead industry, and environmental expertise became the one that we believed would grow and through which the City could succeed. The Chair of the City Council in 1997-2004 (8.3.2007)	The official strategy document 1999: "The emphasis in the employment and business is on quality, design and environmental ecology. The key issue is to focus the development actions on the know-how and expertise of these industries so that they will become internationally competitive." The official strategy document 2001: "Critical success factor: The placement of businesses in the City Evaluation criteria: 1. Education, research and development operations 2. The growth of knowledge industries.

Socio-political agency	Politicians	The City Council became 'the strategic and political leader.'	"In 1997, the Chair of the Council began to strongly emphasize the status of the Council. And, you know, he emphasized Council's strategic working and highlighted Council's broad aligning more than these trifles." Council member (29.1.2007)	Both the City Board and the City Council examine in detail "the City's strategic plan 1997". Based on the minutes of the City Council's meeting 26.5.1997 § 193, various issues are put to a vote. The votes consist of decisions about additions and adjustments such as "When accepting the strategic plan the City Council demands that the human resources strategy, which secures the City's good service production and supports the City's values and strategy, is done together with the personnel."
	Top management	Top management got engaged in strategic planning but also felt sidelined by the Council	"I recall a seminar where the Chair of the City Council announced in his opening speech that the civil servants are not allowed to use the floor here. So I decided then that I won't participate in those seminars anymore." Head of HR (19.1.2007) "The Mayor was dominated by the powerful politicians at that time. He should have chosen his friends better." Council member (18.2.2007)	The local press reported tensions between the political and administrative leaders. These tensions were also evident in strategic work; for example, the administrative leaders did not always take the Council's strategic plans seriously.
	Middle management	Middle managers were not content with their role and the way the strategic plans were interpreted	"Well, I recall a situation during the budget planning when I told the previous Mayor that with the budget that was planned we wouldn't reach the target of 70% of satisfied customers, which was written into the strategic plan. So the Mayor said that let's change the target to 60%. So this is still a game here and the strategy is not done and operationalized like in business organizations." Former Bureau Chief (29.6.2006)	
Textual agency	Performa-tive effects	Strategic plans had limited directive power	"In the beginning of 2000s the strategies were quite, they didn't... I can't remember if we had any orders to manage our operations through the City's strategy. It was there somewhere far away, and we didn't examine it at all. But I do remember that they had a quasi strategy up there. We decided to do our own strategy [for the service unit] because it [the City's strategy] was rather poor."	"The evaluation report 2002" (The City's Evaluation Board, 28.4.2003), page 5 "The City Council approved the City's strategy in May 2001. This was the second time when the strategy was formulated based on Balanced Scorecard -method. ... When examining the Critical Success Factors, Evaluation criteria/measures and compulsory target levels included in the scorecards it has to be pointed out that **on one hand the strategy with all its details has been left as a paper among other**

			Former middle manager (15.11.2007)	**papers without it having the intended guiding influence.** Only few compulsory strategic targets have been reached or operationalized. This is apparently due to the fact that responsibilities in terms of target levels and operations have not been defined. ... Since 2001, the use of Balanced Scorecard –strategy tool has been studied. The method is useful as such but very difficult to manage in practice. **This is why the success in the operationalization of the strategic plan requires that all actors are committed to the strategy that has been formulated this way.**" (Emphasis in the original)
	Referential effects	The first strategic plans had influence in budget discussions	"At one stage we decided to find a strategic theme for each year. And that year we decided to focus on City's youth and we wrote a youth policy. And all of those operations and budgets, which were written into that youth policy, we copied those as such into the budget document. And that was a very concrete way to operationalize those decisions that we made in strategy seminars." The Chair of the City Council in 1997-2004 (8.3.2007)	The official strategy document 2001: "The strategy decided by the City Council consists of obligatory operational targets that are the responsibility of bureaus. They must develop more precise measures and indexes through which the Council can evaluate if the target has been reached."

Sociopolitical agency. The first pioneers of the City's strategic planning worked in the City's planning bureau that played an important role in the City Organization until the mid-1990s. They wrote the first strategy documents, which were included as an appendix to the City's budget. At this time, strategy was merely brought to the City Council to be approved. But when the new City Council and Chair were elected in 1997, the Chair began to emphasize the role of the City Council in strategic planning. He realized that strategy could be "a tool with which the City Council could genuinely influence important issues in the City." Experienced Council members described the new Chair as "the Doctor of Science" who had "a clear vision" of how strategic planning was to be done. For instance, the Chair underlined on various occasions that the City Council is "the strategic and political leader." He also urged Council members to commit to strategy by emphasizing consensus and unanimous approval of the official strategic plan.

In particular, the Council Chair introduced the Balanced Scorecard together with the Deputy Chair of the Council in 2001, and this action significantly changed the way planning was conducted and targets set in the City Organization. It is noteworthy that knowledge of the key concepts and the ability to master the "language of strategy" was increasingly recognized as important. Accordingly, in 2001 the City Council established a committee to examine the City's management and organization structure. In 2002, this committee suggested that the City's bureau-based organization structure would be changed to better enable strategic management. Based on this suggestion, the City Council decided that the City's primary service production was to be divided into three Departments with a Department Head who "would work as a "CEO" of their Department to pursue the profit targets that the City Council has decided" (Report of the Development Commission 15.10.2001).

The Council's intention was to strengthen strategic management in the operational units, but the decision to restructure the City's management changed significantly the roles and identities of key people in the City Organization. It turned key administrators into 'managers' that would increasingly adopt and implement practices of 'business organizations.' As the Council's interest in strategic planning strengthened, strategic leadership became an issue in political power struggles. The other Council members began to see the role of the Council Chair as too strong. Later the Chair reflected that "there might have been a kind of teacher-student relationship there," which was causing the dissatisfaction. Also the Mayor's office and the Bureau Chiefs were frustrated because the City Council was now using its authority to decide what was written in the strategic plan withdrawing the initiative from them.

Textual agency. During this period, the first strategic plans were crafted, and they had important, but limited influence on the operating organization. More than anything else, the official strategic plans were used in budget preparation and to justify financial decisions. However, their influence was mitigated as managers acting as political agents at times diverted the official strategic plan in the budget preparation: "I told the previous Mayor that with the budget that was planned we wouldn't reach the target of 70% of satisfied customers, which was written into the strategic plan. So the Mayor said that let's change the target to 60%." (Former Bureau Chief). Thus, the power of strategic plans was increasing, but still limited at the end of this period.

Synthesis. During these years, strategic planning became an institutionalized part of decision-making in the City Organization. In particular, the Council used strategy discourses and practices to emphasize its role whereas the city administrators (or managers) felt at times bypassed. Although the strategic plans were regarded as important documents, their role was still limited in terms of being primarily used bases for budget planning. The Council had centered power in its hands, and at the end of this period, there was an increasing sense among the key managers that they should

seize more control of decision-making, especially to deal with the financial challenges of the city. This paved the way for the subsequent period, starting with the election of the new Mayor.

7.4.2. Period II (2004-2006): Wresting initiative from the council to city management through the enhancement of textual agency

At the end of the first period, the City Council had put in place a City management structure that would come into its own in the following period as a new Mayor was elected and given the mandate to solidify the City's financing. The Mayor as well as the new Department Heads were required to write *"strategic guidelines for the future"* in which they had to introduce systematic management actions to strengthen the operationalization of the City's strategic objectives, something that the Council had struggled to bring to fruition in the previous period, as the strategic plan remained *"a political document, a fountain of wishes."* As we shall see, influenced by existing discourses of strategic management, the new Mayor took advantage of this opportunity to wrest the initiative for strategic direction from the City Council, while at the same time promoting its operational role by drawing on tools such as the Balanced Scorecard. This led to the enhancement of the role of top management (as the Mayor's office was now called) and in that the strategic plans gained a central role in decision-making (see table 8 below).

Table 8 Sociopolitical and Textual Agency in Period II

		Findings	Interviews	Documents
Discourses	Frameworks	Strategic planning and the BSC became key practices in decision-making	"This consultant firm has done a lot of work with public organizations and also with private ones and they had experience about strategy processes in big cities. So our strategy process followed the template that they had also used elsewhere. And in a way we trusted that the consultants know best how to do strategy." Liaison officer, responsible for writing the strategic plan 2005 (24.2.2006)	The City Council strategy seminar 20.1.2005 PowerPoint slides: "The balanced strategy is not - a list of all those good and important things that should be developed, improved, reformed, and added etc. But it is - a clear prioritized assertion for those things which are most important and which require special attention so that the success is secured"
	Themes	The key theme was to increase the residents' "individual responsibility"	"Our 2005 strategy states that in the service supply we emphasize versatility, freedom of choice, and individual responsibility. Why shouldn't we emphasize individual responsibility! This society has been accused of pampering people." The chair of a political party (29.1.2007)	The City's top management team's strategy seminar 9.12.2004 PowerPoint slides: "Citizens' activeness and respect of themselves will become visible in how they take responsibility of their physical wellbeing (health, exercise, etc.) and also in how they take responsibility of the development of their mental wellbeing (education, hobbies etc.) This concerns not only oneself but also one's children and parents (family community) as well as one's living environment and other people. In practice taking responsibility of wellbeing means larger individual responsibility in the usage of the wellbeing services."
Socio-political	Top management	The new Mayor and his team	"Strategy used to be more a political document and a fountain of wishes than really linked with those operational and economical issues in the City. And together with the top management team we tried to do a	Top management team strategy seminar 20.9.2004 PowerPoint slides: "Internal Strengths: The Mayors Tigers – the top

agency		mobilized strategic planning discourses to gain control of the situation	strategy that we could live with and which would really guide the everyday operations. [...] And the first critique was that we were taking power away from politicians but I think that strategy cannot be done by Council members but it has to be the expression of the will of the acting management." Mayor (29.6.2006)	management team's eagerness to change Internal problems: indecisiveness in the political level"
		The Mayor and top management focused on "individual responsibility"	"I think we were quite brave when we brought this idea of "individual responsibility" into this strategy when all the other big cities still promise in their strategies that they will take care of all the services. We don't do that. We don't do that anymore and that is a big change in this Nordic political atmosphere. That is why we had to assuage it, to get it approved." Mayor (29.6.2006)	The City's strategy 20.6.2005 "The city will be forced to change the basic premise of its service offerings in order to accommodate growing demand and take into account financial constraints. This means that the city will no longer be able to meet all of the needs of its residents. In the future, the city must encourage people to take more responsibility for their personal well-being and the well-being of their loved ones."
	Politicians	Council members felt bypassed in the strategic planning process	"While during previous years the Chair of the Council was running the show, this time the civil servants prepared the strategy far without participation of Council members. Council members weren't happy about it." The Chair of the City Board 2005-2008 (19.10.2006)	The City's Strategy 20.6.2005 "The role and position of political organs and council members is reformed to support strategy implementation."
		The Council members diluted Mayor's strategic goal and target levels in the final stage of the strategic planning process	"Right at the end when politicians discussed about the strategy, this goal to increase the residents' responsibility was changed and written into the strategy as 'encouraging inhabitants to be active in the reformation of the service production'." The Deputy Mayor (4.7.2006) "We wanted to proceed faster with this aim to balance the economy. But the council members undermined those yearly target levels in the political process." Department Head (11.8.2006)	The City's strategy 20.6.2005 "Key thoughts of the vision The vision highlights two special themes for developing the city in the future: - encouraging inhabitants to be active in the reformation of the service production - making creativity and skills the foundation of the city's future success and growth"

	Middle management	Middle managers criticized the top-down approach	"I have a feeling that the strategy was done by the top management team and maybe there were some people involved from the central administration but I think it was quite a small group of people that did the strategy and with this kind of top down mentality." Middle manager (15.11.2007)	Open-ended answers to a questionnaire conducted by a consultant firm in 2006: "The strategy process proceeded too much from top down. It should be crafted also from down to top."
Textual agency	Performative effects	Decisions were implemented in accordance with the official strategic plan	"The City's strategy requires that the amount of schools decreases. And the Committee of Education and Culture decided against the strategy but the City Board vetoed the decision and closed down those schools." Upper middle manager (8.5.2007)	The City's evaluation report 2006: "The City's evaluation board has regularly examined the City's strategy and evaluated its realizing. The strategy is, in fact, the basis for the whole evaluation of the Evaluation Board. You see, the operational targets decided by the City Council and written in the Budget should be derived from strategy. To a great extend this also is so."
	Referential effects	The strategic plan was used to promote and resist specific changes	"If I'll tell you an example of the strategy and its objectives it is this school discussion or the closing of and examination of the school network. This is a clear example. We have examined not only inside this City but regionally that how many schools we physically need. And if we look at the culmination point of strategy, the school network is too tight. And when we examine the school network we find facts that prove that this is so. It is not wise operationally, it is not wise economically and the actions have to be done within a specific time frame. And the first actions are the most difficult ones in this communal democracy. I have an example. I was in an assembly hall of a school, which was to be closed down, and there were hundreds of parents who defended their school. And I was the only one from the City Board and there were people from the committees. And when they interviewed me, it was a judgment day. And I do understand that in that kind of situation the City politician says to these hundreds of people that this school has to be saved rather than explains that this is our strategy and when we follow this the whole City will feel better. The Deputy Chair of the City Board (9.1.2007)	Op-ed in the local newspaper 13.8.2005 Title: International baccalaureate is service for the elite "In the Committee for Education we decided that the City should not apply the license for the international baccalaureate education. [...] The City's new strategy emphasizes the good quality basic services, which also apply to schools. According to the strategy, new services ought not to bring more pressure for the City's finances. International baccalaureate is an elitist service, which can be considered only when the finances are solid, unemployment is low, and there isn't danger for alienation of the common youth. Besides, young people know English well enough without extra education." Signed by 5 Council members Editorial letter in the local newspaper 17.8.2005 Title: The City Board should bring the Committee for Education into line "[...] The Committee for Education voted down the decision to establish an English speaking baccalaureate education.

				This is already a second time when the left wing of the Committee proves its ignorance. Internationalization is also the City's requisite to development. It is also a requisite in the City's strategy. Above all this is a question of finding benefits for business. The City needs more experts, young workers."

Sociopolitical agency. When the new strategic planning process began in 2004, the new Mayor and his team saw the systematic strategic planning process as a means to deal with current challenges. A key idea that the Mayor's team launched in the process was that of "individual responsibility." They saw that by shifting responsibility more to residents themselves the City could reduce its costs. Although this was an emerging discourse, it nevertheless was a controversial idea because it went against tradition in the Nordic welfare system. However, the logic behind the concept of "individual responsibility" resonated very well with the overall discourses of New Public Management that had ground at this stage. The wording was intended to mean that the City would expect an amount of individual responsibility that must be exercised before the City would cover any expenses.

They also hired a consulting firm to help in this process; and its templates focusing on the Balanced Scorecard had a major influence on the production of the plan. As explained by a top manager: *"This consultant firm has done a lot of work with public organizations and also with private ones and they had experience about strategy processes in big cities. So our strategy process followed the template that they had used also elsewhere."* The consultants not only contributed to producing the strategic planning text but were also implicated in training organizational members in specific tools and methods (e.g., BSC, Total Quality Management, web-based HRM system).

The strategic planning process gave the Mayor and his team – rather than the politicians in the City Council – the opportunity to set the objectives and lead the City. As this team was able to master the new discourses and practices, their authority position was also enhanced vis-à-vis others. For example, process embedded extensive participation of administrators, including department heads. Also the role of the Council members and administrators were scrutinized in relation to strategy. The top management aided by the consultants stressed the "big picture" in Council meetings and underscored that *"small issues are not strategically important."*

The Council had mixed feelings about the new process and plan in the making. Some members of the political elite – especially those how had been active to promote strategic planning before – saw this as a positive change. However, others were taken aback by the fact that their role as the key decision-makers seemed to be reduced. Moreover, not all of the members were used to the discourses of strategic planning – such as the Balanced Scorecard – and thus had problems in getting their voices heard and points across. When the Mayor and his team introduced the draft of the new strategy to the City Council, many long-term Council members were unhappy not to have been involved. Also the new strategic punch line seemed too bold: *"The most serious political debate was about what does this 'individual responsibility' enable in relation to whether everything is outsourced and privatized"* (The Chair of the City Board). In fact, in the final stage of the strategy process the City Council exercised its power by modulating top management's strategic goal of individual responsibility and by mitigating some of the target levels aiming at cost reductions. Thus, while top managers had wrested control of the strategic planning processes from the politicians, the plan still needed the Council's approval to acquire legitimacy. In the process, its objectives were diluted. This dilution or *"ambiguation"* would have consequences for the potential of the text as an agent for change.

Textual agency. The new strategic plan – and even its preliminary versions before final approval – turned out to be a very influential document. It had directive performative power in terms of setting goals to for the civil servants and upper management. These goals were linked with the budget responsibility of the upper middle managers and with a new performance appraisal system. Civil servants were expected to follow the strategic plan to increase 'individual responsibility'. In particular, top management underscored the criteria according to which the work was to be done,

in some cases even over civil servants' professional ethos. One of the upper middle managers described this change following way: *"We were told to say that the point is that you won't clean 3 rooms shining tidy but 6 rooms half tidy. That was against the basic working ethos of most employees."* All this meant that decision-making in the City was increasingly structured through 'economies of scale', thus privileging ideas and initiatives that were framed according to a 'business' model.

The new strategic plan was also increasingly referred to when promoting or resisting specific projects and also used extensively in performance appraisal and development discussions. It thus became an obligatory passage point in strategic decision-making enabling (e.g., vetoing) decisions, which were not in line with the strategy. In particular, the term 'individual responsibility' was widely used, but increasingly ambiguously as it was mobilized in various ways. Interestingly, the official strategy plan took different forms as the departments and other stakeholder begun to work on their own strategies, which recontextualized the strategic objectives. These documents followed the genres of strategic planning (SWOTs, visions, missions, and BCSs). Although there were differences, the specific goals of the Departments and stakeholders still tended to follow the City's overall strategic plan.

Synthesis. The analysis of this period shows how the Mayor and his top management team gained a central role by launching an extensive strategic planning process. This emphasized their role vis-à-vis the Council. Top management initially centered control in their hands, but others also sought to be active. The strategic plans became increasingly important both in terms of their directive performative power and as reference points in subsequent discussions. Clarity was sought by formations such as "individual responsibility," but the various discussions and interpretations increased ambiguity. However, this planning process brought with it tensions that greatly influenced what happened in the following period. These tensions included the partial sidelining the Council, relatively passive role given to middle managers and ambiguity in the actual content of the strategy.

7.4.3. Period III (2007-2008): Increasing sophistication and involvement in strategic planning

The Mayor left the City at the end of 2006, and the new team led by the Deputy Mayor[19] launched an updating process focusing on the clarification of the City's strategy. This process, however, became an extensive strategic planning process characterized by the active engagement of a number of actors and a proliferation of strategic planning and creation of numerous plans in various parts of the City Organization. Thus, various actors sought to gain a more central position in and through strategic planning (sociopolitical agency) and the plans became increasingly important (textual agency) (see table 9 below).

[19] The recruitment process for the new Mayor took time until May 2007. The previous Mayor had already launched the strategy updating process, thus after he left, the Deputy Mayor was responsible of chairing the process.

Table 9 Sociopolitical and Textual Agency in Period III

		Findings	Meetings	Interviews	Documents	Observations
Discourses	Frameworks	The BSC was the key framework through which strategies were crafted	TMT meeting 15.1.2007: "If we look at this BSC card, we should be able to link the performance measures with the target levels defined in this card that are drawn from the critical success factor. This is the way the strategy pours down in the organization."	"Balanced Scorecard framework was familiar to everyone so it was wise not to touch on that during this round because our focus was to clarify it and the substantial issues." The deputy mayor (17.9.2008)	The strategy was presented with A4 sheet, in which the City's strategic goals and critical success factors were presented through the four views drawn on BSC.	The Balanced Scorecard played a central role in strategic planning, and the scorecards were often examined in great detail in the strategy seminars.
	Themes	Focus on core operations and "individual responsibility"	TMT meeting 28.12.2006: "Taxation based service supply will be decreased and we will focus on core operations. And the most important one is the development of preconditions for business so that we have enough jobs, expertise and labor power."	"Our strategy will lead to a different kind of society compared to the one that was based on industrialization. The cutting of city services is part of the development that we are now building a service society and it will become obligatory that people themselves buy the services they used to receive from the city. And I know that in this context it is not necessarily welcomed development but we have already witnessed in the U.S. that industrial production acts a minor role in the national income." Mayor (29.6.2006)	The official strategy document 2007: "The city will focus on the core operations and residents' activeness to take individual responsibility will be increased"	The Council's dilution of the concept of 'individual responsibility' was re-opened in the strategic planning process and this time 'individual responsibility' was written into the official strategic plan.
Socio-political agency	Top management	Clarification of key themes became a priority for top management	Top Management Team (TMT) meeting 15.1.2007: "If the strategic goal is clearer it is easier to get troops to work toward that goal. Fuzzier the goal, less effective it will be."	"The concept of 'individual responsibility' is still understood too multifarious ways. It is going to cause arm-wrestling again when it is examined in practice that what it means that residents should take more responsibility about their living environment	Memo of the TMT strategy seminar 28.12.2006: "The strategic goals have to be clarified, and those have to become succinct."	TMT meetings, which took place almost once a week from December 2006 until May 2007, were characterized by continuous definition and

				and about themselves." Deputy mayor (17.9.2008)		redefinition of strategic goals and CSFs.
	Middle management	Frustration and subsequent activation of middle managers	TMT meeting 19.2.2007: "P1: I think that the problem is that you're trying to find such CSFs there, which we should bring from the Department level. Those can't be City level success factors because each department does so different kind of work. So I suggest that we just gather those CSFs from Departments' strategies and write the most important ones here. C: I guess but I still think that we should try to find that balance that BSC stresses. But this is not cast in stone. But what I am trying to do with this tool is that if we have 6000 people working in this organization and we should be able to guide those 6000 individuals with the strategy. If we guide with the strategy only 5 % of the population we will loose the power of 95%. Or then we say that they are doing beneficial and important work but that is not according to strategy. Something is not right then."	"I am not sure whether this updating process was necessary. It is more clear now but considering that we were hand full and had so much other things to do and the implementation of the previous strategy was still ongoing, sometimes I felt that I wasn't that interested about how those words and issues turn out. I think it might have been wise to leave it for the next Council to clarify the strategy." Department head (20.8.2008)	Memo of the Top Management Team meeting 15.1.2007 "Those terms have to be found, which are understood same way and those have to deciphered" "Each Department should get a grip of the goal."	The deputy mayor pursued commitment to shared goals but the department heads were guarding the interests of their own departments by including CSFs that would allocate resources to their own department in the plan.
	Politicians	Increasingly active engagement by politicians	City Council team work 12.4.2007 "This is now our opportunity to share our thoughts about the strategy draft that the city's top management team has proposed and give them feedback. Especially about whether they	"We did the council's team work a week before the strategy seminar and this was a good decision because now the council members felt that they could really influence what is written into the strategy."	Memo of the council's strategy seminar 19. - 20.4.2007 "The council's 3rd deputy chair stated that it becomes clear from the presentation of the council's team work	The communication during the strategy process between the city's top management and politicians increased during

			have succeeded in the clarification of strategic choices."	Council chair 21.11.2008	that the council has genuinely participated in the strategy work."	this planning process.
Textual agency	Performative effects	Many decisions were implemented on the basis of the strategic plans	"Our result is that 117 years of working hours have been decreased and that is already a significant gain. The most of it is savings from outsourced services, the regional health district, and [the Name of a Chief's] actions in his unit. And as you remember it is a result of sweat and tears." Health and Social Service Committee's strategy seminar 4.4.2007	"The focus on the preconditions for business has strengthened during this Council season. Although the decision to build the new exhibition hall was tight again, like it always is in this city, we did it. And the strategy has clearly helped in making the point that we can't place these business issues always against social service supply." Board chair (18.9.2008)	Local newspaper 30.5.2007 Title: The family center is shut down "The Chief of Wellbeing Services comments that 'These decisions depend entirely about how tight our resources are after financing the core operations'."	The two key issues from the strategic plan – focusing on core operations and individual responsibility – became directive guidelines both in the Council's and in the civil servants' decision making
	Referential effects	References to strategy were frequent and important means for promoting or resisting ideas	TMT meeting 19.2.2007: "When the action is in accordance with the strategy that business is ok, but we should look that the crew is acting according to the strategy. If it is not, well, then it is either that the strategy is off beam or then the action is off beam."	"We think our budgeting proposals and preparations so that they fit into these strategies. We know, we are not stupid, that if we propose projects that are according to strategy, it is easier to get funding than to those that are against strategy." Upper middle manager	Local newspaper 3.7.2008 Title: Car park square contradicts Lahti's strategy, Chair of the Social Democrats "According to the current strategy of the City of Lahti, two success factors are deemed crucial: assuring basic security and core functions as well as the organization of basic services. In the section of the report that relates to the city's finances and resources, the number one critical success factor is considered to be avoidance of borrowing. In light of this, I think that it is not the right strategic choice to build a parking lot which sets back over 15 million euros –	Although people questioned the way in which strategic plans were written or whether those plans were relevant, they still saw it necessary that top management and the City Council define and write a strategy for the City. The importance of strategy was not questioned.

					almost a 100 million old Finnish marks." Local Newspaper 6.8.2008 Title: The values of decision-maker say more than many promises. Chair of the Conservatives "The centre vision has been that cars must be kept off the streets, and that the city streets be kept beautiful and attractive. This strategy is implemented in all the other cities in the same size category in Finland. Why should Lahti be any different from other cities?"	

Sociopolitical agency. The initial idea of top management was to update the previous strategic plan to clarify goals and definitions, especially around "individual responsibility." This is because they felt that the meaning of this central theme had been diluted in the final revisions and discussions at the end of the previous period. Furthermore, the Deputy Mayor saw this as an opportunity to tighten the linkage between the City's strategy and Departments' strategies by finding common strategic goals and Critical Success Factors for all of the City's Departments. By launching the update as a participatory process, top management also invited other stakeholders to have their say. This led to a reactivation of the Council and the politicians more generally who now were now prepared to take a more active role. In particular, the Council requested more concrete information about how the strategic plan would be implemented. The Department Heads and the upper middle managers were concerned about this new extensive update because the operational units had just begun to implement the previous strategy, and they worried that this update would disconnect the implementation from the City's overall strategy. Thus, there was now a backlash in terms of new cautiousness in the formation of strategic objectives.

Textual agency. Strategy texts were now playing a central role in the City's strategic decision-making. It was increasingly recognized that strategic plans were now very influential in terms of how decisions could be legitimated and strategic actions taken. The statement "in line with the strategy" was now frequently used. While in the previous stage the City's strategic plan became an obligatory passage point, now this plan was not only made to do things – "if we propose projects that are *in line with the strategy*, it is easier to get funding" (upper middle manager) – but also made political actors do things: "We ensure that the crew is acting *in line with the strategy*" (top management). "When we decide on budget or something else in the City Council, we should always automatically approve civil servants' propositions if those are *in line with the strategy"* (Council member). Previous quotes imply that the City's strategic plan was now coming first: it appointed top management to "ensure" that the strategy is followed and more importantly, obligated politicians to "automatically approve" propositions.

However, the increasing penetration of the City's strategic plan into various different fields of operation and the inflation of the word 'strategy' in general also caused confusion among key people. The question of the relevance of the City's strategic plan was raised. Political actors were uncertain whether the various strategic texts had any real impact on operations and decisions. The ambiguity of "wish-list types of statements and general directions" (as quoted by a resident in the local media) in the City's strategic plan and the mix of various different strategic plans created concerns among those involved in the City's strategy processes, but also among people more generally. Apart from aiming at unambiguous definitions, key people in the City Administration raised fundamental questions about the meaning of strategy in general and the City's strategy in particular at the end of this period.

Synthesis. This period was characterized by increasing sophistication in strategic planning, analysis and discussion. A number of actors, especially the middle management and the Council, seized the opportunity to become more engaged. In fact, this period involved a clear struggle of centering and decentering as top management's initial control turned into an active engagement of others. As a result, strategic planning processes became extensive, and numerous plans were crafted. Thus, the textual agency of the plans increased in an unprecedented way. Although top management initially sought to gain clarity, the involvement of many others created ambiguity around the texts. All this led to a backlash at the end of the period in the sense that the people – and top management in particular – now felt that they were increasingly limited – rather than empowered – by the plans. This paved the way for a new approach to strategic planning in the next period.

7.4.4. Period IV (2009-2011): Top management control and future orientation

The previous elaborate round of strategic planning was seen as exhausting for the people involved. When a new Mayor and his new team took charge, they launched a systematic, but targeted process based on scenario planning. The new strategic plan emphasized growth and the key strategic goal was to make the City the most well known "Green City." Table 10 below summarizes the key discourses, the roles of the key actors and the textual agency of the strategic plan.

Table 10 Sociopolitical and Textual Agency in Period IV

		Findings	Meetings	Interviews	Documents	Observations
Discourses	Frameworks	Scenario planning and SWOT analyses were used in addition to the BSC	TMT meeting 19.3.2009 morning "I'll quickly go through this TOWS. It's the next step after SWOT. It means that the Strengths, Weaknesses, Opportunities, and Threats are cross-tabled. … And this is the most challenging where we have both external threats and where we are weak. The strategy here has to be to defend oneself. I mean that business organization could in this situation where they realize that all options are out decide that they will close down the business, but City organization can't do this. For example, income support is lousy business but we can't quit it. And the City can't either axe functions independently or try to find a new strategic position by centralization. City has to look at the big picture, always. And if we focus on this cross-tabling some things begin to cluster beautifully here in strengths."	"We did in-depth analysis with TOWS where we cross-tabled each and every strength and weakness with each and every opportunity and threat and then looked at how those influenced each other. And then we drew a new table with the idea that we dropped all of those issues like, 'well, this is our strength but we can't see any opportunities for that'. And we went profoundly through this table in the Top Management Team and also in the Strategy Team. We also looked at it in the City Council but it is far too heavy a tool to use in the Council's work. But the interesting issue is that with this we were able to draw a table where we had a corner where we could see opportunities and it was also our strength and that is an easy corner. And then a corner with opportunities but where we are weak, which became the field of investment. And then a corner where there's threats but where we have strengths. That is just a place where we had to think how strong are those threats and is there a likelihood that those will realize. And then the bad corner where there are threats and where we are weak. We examined the first and the last most."	The City's strategy 2025, Page 4-5: SWOT analysis Page 6: "The results of the SWOT analysis have been taken further by cross-tabling the strengths, weaknesses, opportunities, and threats. This has been done to evaluate the City's strategic latitude and options. The evaluation has been the basis of the civil servants' and council members' work when they formulated the City's vision, strategic goals, and critical success factors." Page 6-7: TOWS analysis	Knowledge of future trends and scenarios became the most influential authoring device.

				The Chief of Strategy 23.2.2010		
	Themes	Green thinking became the central issue in strategic planning ("Green City")	TMT meeting 20.4.2009 "Now the vision leans on this concept of the Green City. I tried first the concept of eco-city and I searched different definitions for that from e.g. EU texts. And I tried to fit our strategic goals into that. And quite a few matched but the problem is that the concept of eco-city is often linked to hamlets and small issues. Not to high-tech and vitality like in our view. So green city is now the key issue in our vision."	"We decided to take the environment as the key strategic issue through which we could achieve the needed growth. And this was the hardest core that concerns on one hand the development of this city organization but also the development of this region, its infrastructure and the businesses. So the environment and the growth became the issues through which we examine our image, investments and development actions." The Chief of Strategy 23.2.2010	The official strategy document: "Vision: The city is vital, attractive and environment-focused city"	Green thinking was seen to open up positive avenues for development of the city organization and the businesses.
Socio-political agency	Top management	Top management decided to focus on one strategic plan only	The meetings during previous period, which had focused on strengthening the linkage between City's strategy and Departments' strategies led to a situation where the Department Heads realized that it is unnecessary to go through two strategic planning processes: one in the Council/top management level and one in the Committee/Department level. They decided not to write strategic plans for the Departments during the 2009-2012 strategy process. TMT also stated that all other strategic plans in the City would be omitted and the City would have only one strategic plan.	"We did a strategic decision and the City Council also supported it that we don't have other strategies in the City. We have one strategy and all other strategies are subordinate to that. There has been a monstrous strategy jungle here – HR strategy, purchasing strategy, service strategy, competitiveness strategy, all the regional strategies, innovation strategy and all that you can imagine. Now there's not. Although the content of those documents would be quite the same, they don't call themselves as strategies nor do they write their own vision or strategic goals. This has been mentally a bigger issue than content-wise. But they can't call themselves as strategies. And if you look at	The titles of strategy texts were changed. The City's strategic plan was called 'the Strategy'. Other documents were called e.g. 'the operational plan' and 'the policy'.	People became careful how they used the word strategy. Often they remembered that "the City has the strategy and this document is not".

				documents that have been written here – like the HR policy and so on – in the beginning they say that in the City's strategy it has been decided like this and this policy implements this decision in this and that way. Mentally it is an important change." The Chief of Strategy 23.2.2010		
		Top management became increasingly careful with formulations	TMT meeting 23.2.2009, morning 1: "P1: I think that those budget sentences don't fit in to this. I mean this "enough resources are secured for development actions" is a budget sentence, which is not in the right place if it is written like this. P2: Yes, that is a valid comment. It would then mean that each argument should be written like this that we secure enough resources but P1: And soon after that we would have each Department's arguments here and all of those are then secured enough resources."	"We tried to clean all those dead sentences out from the strategic plan, which would have enabled to carry on work like always. Each sentence was meant to give direction from here to there. And now there's at least half of the City's operations that are not directly written into the strategy." The Chief of Strategy 23.2.2010	Strategic plan was written with focused statements. For example, the goal to make the City as "an example of sustainable development" was defined so that it focused on environmental and ecological factors instead of all kinds of social, cultural and economic factors.	Throughout the strategic planning process there was an aim to find clear statements, which would not leave too much room for interpretation but which would not either leave out too many interpreters important to strategy work.
	Politicians	Politicians participated actively in strategic planning but realized their	TMT meeting 23.2.2009, morning 2 C: It would be good if we would have the vision and strategic goals ready before the Council's strategy seminar	"There was a wide participation during strategic planning but a kind of annoyance about dropping out of operational management appears in the final stage of decision making when the Council begins to discuss decisions after they have already	The City's strategy 2025 Introduction, page 3: "The strategy process of the City was launched in January 2009. The process consisted	The top management team discussed how much participation they should allocate to Council members during the

		decreasing direct influence on operational issues	so that they could approve those in the beginning of the seminar. P1: Already on the way there. C: So that we would have time to discuss about targets and steps there too. So if we could do these hard decisions in our two-day seminar, then we should hope that the Council approves those so that the Council's seminar won't begin with disapproval. P2: That leaves us a week to sell those. Who's going to sell those? Because we are able to sell also difficult issues."	been discussed in the committees." Council member 10.11.2010	various Council seminars and work that was done in the City's top management team, in the strategy team, and in the Departments of the City."	planning process so that the Council would feel committed to follow the strategy.
	Middle management	Middle managers were both frustrated with a lack of specificity and used it to their own advantage	Meeting of the City's general plan team 4.3.2010 "We have to draw different drafts of the general plan with what we can show for the City Council that the strategic goals are contradictory. In the other one we'll stress the environment and in the other one the growth. These can then work as a basis for value discussion."	"Even with the big issues our strategy is jerky. You know, at the same time there's e.g. logistics, design, the connection to Russia, and to Helsinki. And then they dragged the development of the City center into this. So besides jerkiness, there was confusion with strategic and operative thinking. And then, the social and health care, which is blatantly the largest department in our budget, it is barely in our strategy map." Upper Middle Manager 6.10.2009	The City's strategy 2025, update 2011 Page 5: "For most of the Critical Success Factors there has been defined now a more precise target level."	Some of the units saw that they did not have a role in the "Green City" strategy.

Textual agency	Performative effects	Various green projects were launched to implement the strategy	"We must be able to make decisions so that these ideas are really put in action. How do we find such consensus? We should do better and quicker than other cities. Otherwise we'll swim in the red sea where the sharks eat us." The Council's strategy seminar	"We hired a project manager for the Green City project whose job is to develop operations and actions to implement the city's strategy." Director of development	The city's Green City web-page pilot projects, e.g. "An energy-efficient city: The main goal of [the City] Premises Centre's Green City pilot is to reduce the overall energy consumption of the City Corporate Group (city organization and key subsidiaries) by 15% from the 2005 level by 2016."	All kinds of ways to diffuse the strategy were tried out to promote the realization of strategic objectives: Facebook discussion forums for residents, 'on air' Council night-schools through internet, the City's newspaper info, open seminars with the Mayor and administrators etc.
	Referential effects	The strategic plan was interpreted and referred to in different ways	Council's strategy seminar 24.3.2011 "Council members need reliable information on how the strategy is operationalized. Now there's a lack of exact development measures on some of those most important goals, like the internationalization of environment and design clusters."	"Residents have become more enlightened strategy-wise. And this has led to situations where we have had to think over again made plans because the strategy, which is approved by the top decision-makers, is the text according to which we should guide action. At times civil servants second-guess which sentences the decision-makers read. And proposals are presented like 'if you follow these sentences this is the conclusion and if you follow other sentences, the conclusion is different.'" Middle Manager 4.3.2010	N/A	N/A

Sociopolitical agency. This new round was deliberately designed so that it would maintain control in the hands of top management that now also included a Director of Development and a Chief of Strategy. Interestingly, the new top management now decided that the City would only have one official document called "The Strategy." All other documents were given other labels (operational plans, policies, etc.) and could not include competing visions, missions, strategic goals, or success factors. Top management and most of the Council welcomed this decision. Now there was a clear order from the top instead of ambiguity about the role of the various plans. The Department Heads and personnel, however, had mixed feelings because they were now given less opportunity to create their own action plans themselves. In any case, the decision made people even more careful with what was written in the strategy and whom to involve in strategy formulation.

This new planning process further emphasized the role of expertise in strategic planning. This time the use of scenario planning specifically meant that experts who could convincingly argue for future trends in demographics or financial development – such as the new experts of top management – were given a prominent role. The Chief of Strategy proposed that the vision year would be set to 2025, while before it was set usually 5 years ahead. Future-oriented planning reopened the possibility for visionary leadership and brought more freedom into Balanced Scorecard driven strategizing. However, scenario planning also led Council members and middle managers to doubt whether they would be able to influence future developments in more concrete terms. It is also noteworthy that "green" discourse overtook "individual responsibility" discourse during this period, shifting focus from service production to environmental factors – that were often seen as more ambiguous by the middle managers.

Textual agency. The single strategic plan gained an influential position. However, at the same time, its future orientation made the directives less concrete and compelling. Thus, although the Departments had been stripped of their right to produce their own strategies, they now ironically had more freedom in making decisions about key issues. Furthermore, middle managers and employees pointed to contradictory strategic goals in the strategic plan. The City's strategic plan was striving for growth at the same time as Green City goals, which became confusing for example when the architects and planners of the City's general plan were trying to implement the strategy. They decided to "draw different drafts of the general plan so that we can show the City Council that the strategic goals are contradictory" (Meeting of the City's general plan team). One of the Department Heads decided to try 'Pay for Performance' as a tool to "make the linkage between strategy and work transparent and robust" (Department Head). In concrete terms, this meant that those operational units that reached the strategically important target levels were rewarded. The Department's administrative director reflected that 'Pay for Performance' had "dieselized the implementation of strategy and made it as part of day to day work."

Synthesis. This fourth period was characterized by top management again seizing control of strategic planning. However, the centering of agency by top management was thus only partially successful as others got involved. Top management focused all attention on a single strategic plan, which made this text extremely powerful. However, due to the future orientation of the plan, its directive performative power remained limited. Nevertheless, it was frequently used as a reference point in the various strategic discussions. Interestingly, the plan was perceived as ambiguous, which allowed various people to use it to pursue their own agenda.

7.4.5. Summarizing

As a whole, this case shows how strategic planning was conducted in different ways in different time periods in the City Organization. In particular, our case illustrates how the *sociopolitical actors and the strategic plans together constituted strategic agency the specific nature of which differed from period to period*. These changes can be partly explained by the fact that the context, key political actors and plans changed over time. However, the previous actions and experiences also influenced new ones, which was shown for example in the way in which the key sociopolitical actors worked on strategy texts. Thus, there was path dependency without which it is impossible to fully understand the way in which strategic planning processed unfolded over time. But what are the key dynamics involved in the constitution of strategic agency across cycles of strategic planning? This is the question that we will focus on in the next section.

7.5. Inherent Dynamics in the exercise of strategic agency

Our analysis elucidates the interdependence of sociopolitical and textual agency and how they together constitute strategic agency in and through strategic planning. By so doing, it helps to understand some of the central dynamics in strategic planning that have received little attention in previous studies of strategy formation. Figure 2 below provides a summary of our model.

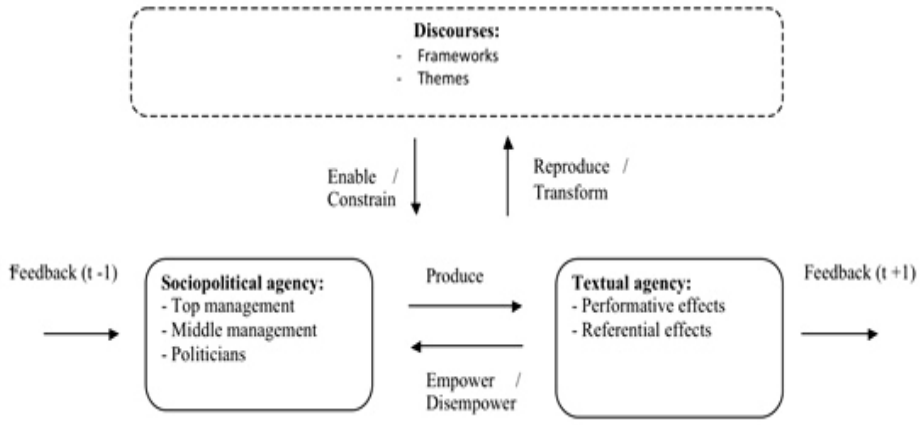


Figure 2 Sociopolitical and textual agency in strategy formation

Discourses. Our case demonstrates how strategy discourses enable and constrain managers and other actors as well as provide the basis for strategic plans as influential texts. In particular, strategy discourses empowered some actors and at the same time constrained the agency of others. For example, gradually, the Mayor and other top managers were constructed as 'key strategists.' Thus, our analysis supports previous studies pointing to the power effects of discourses of New Public Management in general and strategic planning in particular (Knights & Morgan, 1991; Oakes et al., 1998; Hodge & Coronado, 2006). However, our case also shows how others, including both politicians and managers of the departments, were quick to maneuver and position themselves as key actors in strategy formation. By highlighting the ability of

various actors to seek and establish new key positions in and through strategy discourses, our study thus adds to previous research in this area.

Sociopolitical agency. Our analysis provides ample evidence of the way in which political actors sought to strengthen their own position in and through strategic planning. In particular, our analysis highlights the tensions between top management and the Council as well as the middle managers in the departments. Our analysis underscores how this all happens in and through discourses and strategic plans. The point is that the sociopolitical agency is actualized by drawing on available discourses (e.g., frameworks and themes) and by authoring strategic plans.

In particular, our analysis reveals the central dynamics of centering vs. decentering forces in strategic planning – that have elsewhere been called heteroglossia (Bakhtin, 1984; Boje, 2008; Vaara & Tienari, 2011). The essence of this dynamic is in the control of authoring: to which extent it is centralized or decentralized. Thus, this dynamic is closely linked with key issues such as implementation and participation in strategy formation (Mantere & Vaara, 2008).

On the one hand, the key actors strived to control meaning, i.e. to make sure that they were able control the content of strategy and the way in which strategic planning was conducted. This was evident in the first period when both the Council took control of strategic planning. In the next periods, the Mayors and their administration then acted to make sure that strategy was produced in a concerted manner. This control was also clearly visible in the focus on the official strategic plans. In particular, the new extensive plan crafted in the second period was a means to focus meaning in and through one powerful document. An even more striking example comes from the fourth period when the new Mayor and his team explicitly banned others from producing strategic plans or strategies.

On the other hand, the case also shows how important the decentering of planning was to mobilize people. This was an explicit goal of strategic planning in our case. Exceptional care was taken to make sure that people were engaged the strategic plans of the second, third and fourth periods – which was also a prerequisite to make sure that the strategies would connect with people and take 'off' (Hardy, Palmer & Phillips, 2000). This involvement, however, also had the unintended consequence that it reduced the control of specific actors. In particular, by inviting others to participate, top management lost the very control it had sought to strengthen with the new strategic planning process in the third period. Then in the fourth period control was by the focus on one strategic plan only, but again other actors' engagement led to decentering by the end of the fourth period.

Textual agency. The strategic plans were important means for the actors to exercise agency. This involved directive performative power as in the articulation and legitimation of goals and objectives. In addition, the plans themselves also became key reference points or even obligatory passage points in the legitimation or resistance of specific decisions or actions. Interestingly, towards the end of our observation period, the textual agency of the strategic plans started to overwhelm the actors. That is, the tedious processes and practices of strategic planning appeared to exercise power over the actors (Foucault, 1980) by constraining their ability to promote ideas and interests on their own terms. In fact, many felt that the existing frameworks (especially the Balanced Scorecard) and the time and energy put into strategic planning significantly restricted their degrees of freedom. This in turn triggered a response in the fourth period in that top management again wanted to gain control by simplifying the strategic planning process and by reverting to scenario planning as a new method.

This mutual dependence between sociopolitical and textual agency can be seen as an example of 'ventriloquism' (Cooren, 2010). According to Cooren (2010: 90) ventriloquism takes place when "semiotic beings, whether we like it or not, make us to do things ... as much as we make them to do things ... [w]e can be betrayed by what we say or write, which means that what was said or written can put the person who wrote or said something in position that she had not anticipated or foreseen." The decision of top management to only allow for one official strategic plan in the fourth period is an interesting case in this respect; by so doing, top management increased their own influence, but at the same time accentuated the power of the specific plan, with both empowering and disempowering implications. As Cooren (2010: 90) explains, ventriloquism works both ways: as much as people make textual agents do things the texts also make people act, sometimes in unintended ways.

In particular, our analysis reveals the central role of ambiguity in strategic planning (Davenport & Leitch, 2006; Denis et al., 2011; Eisenberg, 1984) and more specifically a dynamic of clarity and ambiguity. On the one hand, clarity of texts appears to have the potential to invest them with greater agency, enabling "action at a distance," (Latour, 1987) i.e., the channeling of influence in and through the texts. This drive for clarity was present in the first period when the Council Chair took control of strategy development, introducing the Balanced Scorecard as a means to ensure that plans designed by the City's political representatives as "strategic leaders" were followed. It is also visible in the third period when the Deputy Mayor attempted to pin down the "individual responsibility" theme that had been introduced in the second period, and to draw on the strategy discourse of "critical success factors" to formalize definitions. Clarity serves the objectives of selection, prioritization and control.

On the other hand, and precisely for this reason, clarity can be problematic for those whose roles and identities are then submitted to the discipline of texts and discourses resulting in various strategies of resistance. Clarity is also problematic in situations where the constitution and legitimacy of any expression of collective organizational agency requires consensus among a broad range of participants, and in particular where key actors are democratically elected to represent various constituents. Thus we see during each phase political struggles occurring around the very issue of clarity vs. ambiguity as different actors see in it different advantages and disadvantages.

In fact, in this kind of a highly political setting, although oscillating between the two poles, ambiguity ultimately tends to win out, despite the continuing push for clarity. Thus in the first period, we see how despite attempts to orient strategy in an unambiguous manner, the Council Chair's moves were undermined by the administration's ability to shift goals at will, and the lack of tools for follow-up from a distance so far away from operations. In the second period, we see how despite Mayor's intentions to undertake a radical move towards reducing services, the term "individual responsibility" expressed in the plan was artfully designed to imply such reductions without formulating them in explicit terms – a form of strategic or purposeful ambiguity (Eisenberg, 1984). This allowed politicians to agree to the move despite discomfort, but it also subsequently permitted further artful reinterpretation by departmental managers to fit with their interests.

In the third period, in reaction to persistent ambiguity, the Deputy Mayor attempted to pin down the "individual responsibility" term and the "critical success factors" associated with it. However, this was actively resisted both above and below. In fact, during this period, lower level managers seem to have understood that clarity serves the interests of those who wish to ensure that particular things that they want to do are legitimated through expression in formal documents. Thus in the second and third periods during which lower level departmental strategic plans proliferated, we can see in their own textual productions a recognition of the potential for agency of such texts,

and the need to explicitly reinterpret and reformulate top level strategic plans in ways that would now make them livable with at lower levels and that would correspond to their interests. It is this local clarity, however, that made explicit the many multiple interpretations of the strategy. Although human agents increasingly referred to these planning documents (i.e., drew on textual agency) to justify what they were doing, these documents did not provide a consistent portrait of the organization's strategy, and they could thus be mobilized in many different ways.

It is this confusion of micro-level strategies that contributed to instigating the fourth period, where a Chief of Strategy drew on more recent discourses of scenario planning and green strategy to rethink and redefine the approach with a more overarching theme, declaring that only the centrally-developed document could be designated as the organization's "strategy." While clarifying what was strategy and what was not, the overall theme of this process was very open. It enabled mobilization, but its long term perspective and lack of precision about specific goals left departmental managers with even greater room for maneuver than before. As some departments begin considering how to implement the strategy, even drawing on the use of pay for performance systems, the dialectic tension and oscillatory movement between clarity and ambiguity continues. Thus, strategic plans are ambivalent instruments whose role as productive tool or as undesirable constraint for any particular group depends on the mix of clarity and ambiguity embedded in them.

7.6. Conclusion

In spite of the close linkage of strategy and agency, there is a lack of understanding of the way in which agency is constituted in strategy formation (Balogun & Johnson, 2004; Wooldridge & Floyd, 1990; Mantere, 2008). Rather than following the tendency to attribute agency to managers as individuals alone (Felin & Foss, 2005; Floyd & Sputtek, 2011; Foss, 2011), we have focused on how this agency is enabled and constrained in and through discourse and communication. In particular, we have aimed at elucidating the central role and interplay of sociopolitical and textual agency. Our case analysis demonstrates how strategy discourses and planning texts provide resources for managers and that these discourses and texts also contribute to constituting roles and identities in strategy formation. This helps to better understand how exactly influence is exercised in and through strategic planning in contemporary organizations – a characteristic feature of which is that communication is mediatized in and through formal processes and plans. Even more importantly, this analysis shows how the strategic agency itself – conceptualized as interplay of sociopolitical and textual agency – takes different forms over time.

By so doing, our study contributes to research on agency in strategy formation. Prior studies have highlighted the politics of top-level organizational decision-making (Pettigrew, 1973) and the central role of middle managers (Balogun & Johnson, 2004; Wooldridge & Floyd, 1990; Mantere, 2008), but the focus has usually been on managers alone. Reflections on the ways in which strategic planning practices enable or constrain strategy formation have been rare (Ezzamel and Willmott, 2008; Whittington, 2006; Vaara & Whittington, 2012). Our analysis adds to these studies by elucidating the central role that both discourses in general and texts in particular play in strategy formation. In particular, we have demonstrated how texts co-construct agency with human political actors.

Our analysis has specific implications on research taking a discursive perspective on strategy and strategizing. In particular, it helps to better comprehend the constitutive role of language in the form of power of discourse and textual agency. While previous studies have emphasized the central role of discourses (Knights & Morgan, 1991) and

some have also pointed to the crucial role of strategic plans (Hodge & Coronado, 2006; Kornberger & Clegg, 2011), studies examining their interplay with sociopolitical agency have been rare (see, however, Spee & Jarzabkowski, 2011). Our analysis helps to place the discursive and textual aspects of strategizing into context by demonstrating how their effects are dependent on and intertwine with managerial action over time. By emphasizing the role of language, we do not wish to downplay the role of individual or social agency as is sometimes done in discursive analyses (Knights & Morgan, 1991). On the contrary, we believe that it is only by identifying the ways in which discourses and texts enable and constrain social action that we can better understand the nature of strategic decision-making in today's organizations.

Our analysis has been inspired by the recent work on the constitutive role of organizational communication in general (Taylor & van Every, 2000) and textual agency in particular (Cooren, 2010). This approach is useful as it provides a conceptual basis to both emphasize the central role discourse and the way in which social actors are able to mobilize discourse for their own purposes. Our study may in turn inform this stream of research by demonstrating how these effects come together and constitute strategic agency. Strategy formation is arguably a crucial part of contemporary organizations, and by unraveling the interplay of sociopolitical textual agency we can better understand how exactly strategic agency is constituted and strategies talked to being.

Our study has limitations that should be taken seriously. This analysis is based on a revelatory case that has unique features. Although we believe that other cases are likely to be characterized by analogous sociopolitical and discursive dynamics, it would be important and to examine cases in other cultural and industrial settings and compare the findings. Our analysis has been longitudinal to uncover the process dynamics over specific cycles of strategic planning. Future studies could focus on specific discursive and textual dynamics such as rhetorical strategies used in authoring strategies. Such analyses would shed more light for example on the competences of managers and the dynamics of strategy conversations. It would also be interesting to track down how exactly meanings are created in and through strategy texts as they are written.

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