



Planning reconsidered: Paradox, poetry and people at the edge of strategy



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ABSTRACT

The study of strategy is now firmly established in the wider management and organization literature, yet the strategist is often notable by their absence in studies and findings. In this short essay we suggest two main reasons for this. First, strategy research switches between organization, group and individual depending on the level of analysis that is being conducted. Organizations are sometimes inappropriately treated as though they were sentient, and there is relatively little research targeting the individual level despite calls to establish a so-called micro foundation within the field. Second, strategy research also implicitly subscribes to a view of human action that is typically rational or normative. Neither offers a natural sympathy for the inherent creativity of individual action. To address these concerns we introduce both paradox and poetics as a means of revisiting the established problem of implementation failure. In presenting the Strategy Cycle, and by identifying differences in the styles or orientations of individual strategists, we advance thinking on the issue of emergent strategy, suggesting that emergence is amenable to certain forms of influence. The net result is an attempt to move the strategist from a position at the edge of our thinking to their rightful place at the heart of strategy as a subject of academic enquiry.

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Introduction

Robert Chia contributed to this series of “perspective” essays in EMJ (Chia, 2014) with a thought-provoking call to continue to develop management and organization research in the “European tradition”. Chia contrasts the ideal of rigour with the idea of rigor mortis, urging fellow researchers to push for innovative thinking. In so doing, he alerts us to the potential dangers of a somewhat totalizing orthodoxy that only recognizes, funds and publishes work adhering to the protocols of what is generally considered to be methodologically sound scientific enquiry.

In a counter move, he points towards “artistic rigour”, that is, an approach to organization scholarship that is informed more by artistic sensitivities and capabilities than by scientific method. A genuine “*democracy of vision*” characterized by a refusal “*to accept pre-existing conceptual distinctions between the various elements that make up a phenomenal experience*” (Chia, 2014); one that “*... is energized by a fertile and imaginative mind*” and enabled by “*an acute empirical sensitivity*” (op. cit: 685) sometimes focused on “*singular events*”, and one that is open to the influence of impressions,

intuitions and imagination in bold acts of creativity that often skirt over and beyond otherwise troublesome contradictions, areas of ignorance, uncertainty, etc.

We are delighted to have the opportunity to offer our own views in the same series of short essays and we respond to Chia’s contribution by developing his concern that our collective scholarship should more accurately reflect the behaviour of businesses, organizations in general, and the people that comprise them. Specifically, we focus on what is broadly termed strategy or strategic management. We are particularly concerned here to reflect on what we have learned from over two decades of working with a multitude of organizations during periods where strategy has been developed.

Our work has often taken the form of a particular style of action research (MacLean, MacIntosh, & Grant, 2002); yet some of what we say is inevitably informed by our own experiences running businesses and other forms of organization, sitting on various boards, and acting as consultants to a wide range of organizations. Mirroring the rigour-relevance tension identified by Chia, our own work is largely concerned with helping individuals in demanding roles to break free from some of the suffocating effects of outmoded, over-extended managerialism in pursuit of the twin aims of successful collective action and enriched human experience.

What follows is therefore a partial and personal account of strategy and strategic management in which we seek to unpack the kinds

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of strategizing practices we have encountered in organizations. Our aim is to show that strategy is at least as well described in artistic as opposed to rational scientific terms. In so doing we offer some suggestions for those charged with the development and deployment of strategy.

We will begin by revisiting the observation that plans do not always come to fruition before moving to less familiar territory. We introduce the idea of paradox, along with the other major view of strategy – namely that of “emergent strategy” placing each in relation to planning. Next we explore what happens during the realization that a particular plan is not coming to fruition, arguing that a form of creative action takes over. This leads us to consider what are essentially poetic faculties before we conclude by focusing attention on something which is surprisingly absent from most mainstream writings on strategy – namely the situated strategist resplendent in their myriad variety. Our view sets out a rich ecology of strategy styles and approaches which straddle art and science as well as varying between contexts and cultures.

Planning

People often associate the term “strategy” with some key terms such as aim, vision, objectives, goals or route map. Having asked many thousands of individuals this question in workshops, classrooms and boardrooms, the most frequent answer received is “a plan” with subsequent qualifications including that a strategy is a “high-level” plan; a “big-picture” plan; it’s a plan “for the whole business”; and perhaps crucially that it’s a “long-term” which involves “the commitment of significant resource” in ways which are “not easily undone”.

Such descriptions of strategy should hardly seem surprising, since this was mostly what was (and, in many cases, still is) taught in business schools or conveyed in the canonical texts of the so-called “content school” of strategy (Schendel, 1992). From the early work of pioneers such as Chandler (1962), Sloan (1963), and Ansoff (1965) through Porter’s work on positioning (1985) and onward to more recent offerings on Resource Based Thinking (see MacIntosh & MacLean, 2015, pp. 14–20 for an overview), the emphasis has been on rational planned action, usually reserved to the senior levels of the organization – and usually underpinned by ever-more sophisticated analysis of the environment, the cultural or ideological fabric of the organization, and its resources or capabilities. Typically this gives rise to a limited number of configurations which offer options for attaining some form of competitive advantage over rivals. We would suggest that this is nothing more than a modern expression of Cartesian thinking in which action is structured by prior intellectual effort. It also represents a variation on the familiar rational schema at the heart of most western education – ends (intent), means (resources and capability) and conditions (environmental trends) – in which analysis and other forms of structured intellectual activity seek to bring these into fruitful, if not optimal, alignment as a blueprint for action. Notably, the traditional mindset in much of the strategy literature is that action is both done by others and follows the creation of the blueprint or plan.

This view of strategy remains remarkably pervasive, yet it seems to be losing connection with, or downplaying, another key aspect of the strategy – which we might call “artfulness”. In short, strategy in historical terms was primarily concerned with overturning unfavourable odds, with effecting a successful outcome in spite of the balance of probabilities. As laid out in a remarkable review of strategy – from its inception in ancient times through to its contemporary appearance in business – Oxford historian Lawrence Freedman (Freedman, 2013) draws attention to this artfulness which is both rooted in, and arises out of, a real challenge. To some this

may be most familiar in the words of Baldrick,¹ Edmund Blackadder’s hapless yet faithful manservant in the TV series “Blackadder” who routinely offers his master a series of ill-fated cunning plans. Baldrick may seem an unlikely strategist but we would agree with Carter’s account of strategy as a “paradoxical cocktail of far-sightedness, pragmatism, expediency and low cunning” (2013, 1047). Strategies (cunning or otherwise) are called for in challenging situations, yet some organizations may face circumstances which are not perceived as particularly challenging. As such, and contrary to current fashions, there is nothing in the concept of strategy that implies that organizations must have one, nor, for that matter, unless they are singularly challenged, need they have only one.

Strategies “belong to” challenges, not organizations per se, and, as Richard Rumelt eloquently argues in his book “Good Strategy, Bad Strategy” (2011), perhaps the most important stage in crafting a strategy is a succinct statement of the challenge, or challenges, faced. Our own contention is that this diagnosis of the organization’s evolution and current situation is a form of problem framing (Mitroff & Silvers, 2009).

To craft a strategy statement is, in rational terms at least, remarkably straightforward since it might simply be thought of as a succinct plan. Having undertaken diagnosis, analysis, articulation of a challenge, and consideration of options, the key challenge is in assembling the various elements of strategy into a coherent whole. In our experience, many strategies are analytically comprehensive but feature sins of both omission and commission. Hence a badly assembled strategy resembles a bicycle with two sets of pedals but no chain and with the handlebars where there should be a seat. Fortunately language can help us here. If we respond to the “humpty-dumpty” challenge of putting things back together again in the right order, by writing our strategy within a comprehensible and meaningful structure then we can dramatically influence the extent to which it is likely to “make sense”.

In our practice, we encourage strategists to write within structured forms, with one variation being:

“we will [W = intent] double our turnover in [X = timeframe] 5 years by exploiting our [Y = statement of capability] unique strength in laser packaging to [Z = statement of opportunity] gain a leading position in the emerging optical computer industry.”

You can see that this WXYZ format channels the strategist towards the components of the rational ends–means–conditions schema, in our case expressed as intent (double our turnover in 5 years and gain a leading position), capability (unique strength in laser packaging), and foresight (the emerging optical computer industry). From studying and developing a large number of strategy statements, we have identified a set of twelve such structuring devices that form the basis of a comprehensive statement of strategy. The following example shows how these twelve choices interlock to form a strategy.

The challenge we face is that, since our core market is not growing, our continued growth in that sector requires us to take share from our competitors. This growth strategy will be delivered through a combination of market penetration and the acquisition of struggling competitors to achieve economies of scale, allowing us to further exploit our superior ability to manage costs in the production process. We will therefore compete on the basis of cost, offering a consistently high standard of goods at low production costs. We are therefore seeking to become the dominant player within our strategic group by 2015. In so doing we will achieve growth in turnover to at least £25 million and be seen as the preferred provider of

¹ The BBC comedy series Blackadder ran over four seasons from 1983 to 1989. Four different generations of the character Baldrick appear, with each season being placed in a specific historical period.

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