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The evolution of performance management discourse in corporate strategy diagrams for public institutions

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ABSTRACT

A specific kind of performance management model called 'Balanced Scorecard' has come to dominate the way institutions are run around the world, oriented to increasing outputs and to 'quality assurance'. Strategic diagrams emerged out of this model, claiming to break down all institutional parts and processes into a flow-chart forming a sort of road map of the role played by all parts of an organization in reaching targets. Drawing on Fairclough's (1992) notion of the 'technologization' of discourse and Van Leeuwen's (2008) notion of 'the new writing' this paper applies multimodal critical discourse analysis to a sample of diagrams from a wider corpus showing how they have changed over time, becoming more abstracted and symbolic, as the performance management discourse itself has become naturalized.

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1. Introduction

Corporate strategy diagrams evolved from a specific performance management model developed since the 1990s called Balanced Scorecard (BSC) (Kaplan and Norton, 1992). This now dominates how both private companies and public institutions around the world, such as hospitals, schools and universities are run, organized around notions of 'vision', 'core values', 'targets' and 'strategic plans', where all parts of the organization are steered to meet these targets and fulfill the vision, based on increased outputs and quality assurance. Strategy diagrams, or 'strategy maps' (Kaplan and Norton, 2004), are presented by management as the basic map or visualization of what goes on in all parts of the institution based on a system of checks and measures introduced by BSC. These maps form a focal point for how all other processes are categorized and performance managed across the organization. Such diagrams have been produced with evolving software which provides ever more visually interesting templates, which, we will argue, are preloaded with very specific ideas and values about bureaucratic processes and organizational priorities.

In this paper, taking universities as a case, we explore how these diagrams draw on a range of semiotic resources to represent work processes and causalities, through the process of representing all parts of an institution in a manner which can be monitored through checks and measures, in the name of quality

assurance and increasing outputs. We place this analysis in part in the context of what Fairclough (1992) calls the 'technologization' of discourse, a process in which the 'quality assurance' discourse of performance management becomes operationalized through new technologies where the social codification of semiosis has intensified. There was an increased "level of conscious intervention to control and shape language practices in accordance with economic, political and institutional objectives" (Fairclough and Wodak, 1997: 260). For Fairclough (1992: 207) this technologization went along with a process of 'commodification' or 'marketization' where parts of social life not formerly concerned with producing goods become "organized in terms of production, distribution and consumption". So, for example, quality in learning in primary schools or of care in hospitals involves the application of increasingly complex processes of codification and standardization in order to deliver 'quality'.

We are specifically interested in how strategic diagrams have changed over time as new semiotic resources evolve and become naturalized. Previous research has pointed to a marketized language gaining ground in the public sector and universities since the 1990s trying to sell "goods, services, organizations, ideas or people" (Fairclough 1993: 14) and using all sorts of buzzwords such as 'innovative' and 'competitive' (e.g. Holborow, 2013, Mautner, 2014). Today, we argue, there has been a profound shift in how institutions communicate, reaching beyond the use of buzzwords. We face a new type of semiotics which has been

termed ‘the new writing’ (Van Leeuwen, 2008). Semiotic forms characteristic of the new writing are the preference not for running texts but bulleted lists, diagrams and more systematic uses of other design resources. There has been a move away from self-standing documents, which provide explanations and context through running text, to new forms of digital communication where semiotic resources are intertwined (cf. Kress, 2005, Ledin and Machin, 2015a, 2015b). These new kinds of documents reply on software such as Powerpoint, InDesign and Smartdraw, which come pre-loaded with templates which favor certain kinds of representations (Djonov and Van Leeuwen, 2014).

In this paper we begin by looking at an example of the typical use of the BSC and strategy map for a small airline company, which seeks to increase profit, and also quality assurance. This step is important as it provides a basis for us to consider how this logic is then extended to public institutions. We then analyze three strategic diagrams taken from a wider corpus which represent the kinds of changes in uses of semiotic resources over time that we found. We show that the performance management discourse relies heavily on technologization and forms of new writing for its legitimation. We find a gradual departure away from clear explanations and representation of context to greater levels of abstraction and symbolization. The technologized multimodal language has become increasingly naturalized, carrying the performance management discourse, and the ideas and values of the neoliberal order that it represents, with decreasing reminders of why it may, in one sense at least, be logical.

2. The Balanced Scorecard system and the strategy map

The rise of performance management itself has been linked to the emergence of neoliberalism and Schumpeterian economics (Jessop, 2007). Whereas the former centralized capitalist state was based around a demand system based on full employment, stability and welfare, neoliberalism is based rather on a mobile and adaptable workforce, where economic prosperity is seen to come from competition amongst parts (ibid). This is a model that has been applied to public institutions as well as corporations and also becomes transferred as normative behavior for individual employees (Kärreman and Alvesson, 2004). Neoliberalism has also seen a hollowing out of government, where power is devolved to private and quasi-government bodies and where public institutions too are run as independent corporations. In this system checks and measures are required to maintain transparency, cost effectiveness, value for money, etc., both for the shareholders of companies and the citizen ‘stakeholders’ of public institutions (Jessop, 2007). Here we find the drive to the ‘technologization’ and codification of semiotic resources described by Fairclough (1992). This decline of the centralized state includes the weakening of its more traditional institutions and more static forms of knowledge, hence the decline of the kinds of professional knowledge and identities which formerly controlled the priorities of public institutions (Beck, 1992, Kress, 2005), making way for the evolution of the performance management discourse and the new writing we address in this paper.

The BSC system and the strategy map have been chief technologies by which performance management has been carried out in both the private and public sectors and has been taken up around the world. The shift to the forms of codification, or technologization, of processes and identities which the strategic diagram involve, have reshaped the nature of work life and, we would argue, have been an important tool in the legitimation of the performance management discourse and the neoliberal model itself.

The BSC was developed by Kaplan and Norton (1992) and builds on “measures that drive performance”. This system aligns all business activities to the overall vision and strategy of the organization, allowing management to monitor the performance at all levels. The breakthrough with this system was that it included non-financial performance measures, in the name of providing managers with a ‘balanced’ view of performance. This would mean identifying things like attitudes and learning as important in meeting goals.

The strategy map was a follow-up from the BSC system introducing yet another technology (Kaplan and Norton, 2004). Just as the system of measuring itself broke down the practices and processes of an organization into components that were stated in a strategic plan, which today is commonplace in higher education, the strategy map enabled objectives and outcomes to be linked by explicit cause-and-effect relationships. What is suggested is in fact a new semiotics which Kaplan and Norton (2004: 8) claim is “as important an innovation as the original Balanced Scorecard itself”.

In Fig. 1 we see Kaplan and Norton’s (2004) idea about how a typical strategy map should be designed, which has been the basis for developing templates in software such as Smartdraw, and also how the map is linked to the BSC. It builds on the case of a low-cost airline that has defined a business priority, a strategic theme, which is ‘quicker ground turnaround’, stated on top of the map. To the left we meet the four perspectives inherent in the BSC and linked to each other by cause-and-effect. The general idea is that if you train and steer employees (Learning and Growth) the business will run better (Internal Business Processes). The business will then take good care of its customers (Customer), which in turn has the effect that the sales, and thus profits, increase (Financial). This causality lies at the heart of the BSC system and is, in the map, semiotically expressed in a bottom-up composition and with arrows between the framed strategic objectives attached to each perspective. The objectives climb upwards until they reach the top objective “Profits”. Each objective is also connected to the metrics of the BSC and compared to numerical targets. To the right we see that an action plan takes care of the implementation of the strategy and specifies budgeted activities.

The use of the BSC and strategic diagrams in non-profit organizations and in the public sector have spread rapidly, not least in higher education. In management research Han and Zhong (2015: 941) advocate that universities should use the BSC since “the most valuable resources in the university, unlike in profitable corporations, are intangible assets of culture, knowledge and human capital”. They argue that the strategy map “serves as a powerful visualization tool for transforming intangible assets into tangible outcomes while improving overall competitiveness”. University managements have also published papers on early implementations of strategy maps, for example University of Leeds (Donoghue and Kennerly, 2008) and University of Newcastle (Young and McConkey, 2009) explaining why they are of great importance.

3. Data and methods

The examples we analyze are selected as representative of a larger corpus of 250 international strategic diagrams from the public sector, for schools, universities, municipalities and health care. The data reveals some clear patterns of how they have changed, which we demonstrate in our analysis. The reason for choosing universities as a case is that such data is easily available on the Internet and allows a global perspective, in our case data from 14 different countries. Technologization clearly goes hand in hand with globalization so that similar strategic diagrams connected to the BSC are used around the world.

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