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**OPEN STRATEGY-MAKING AT THE WIKIMEDIA FOUNDATION –
A DIALOGIC PERSPECTIVE**

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Abstract

Dialogue is essential to open strategy processes, yet these processes have not been researched from a dialogic perspective. We therefore ask the question: What is the role of dialogue in open strategy processes? Our study of the development of Wikimedia's 5-year strategy plan through an open strategy process reveals the endemic nature of tensions occasioned by the intersection of dialogue as an emergent, non-hierarchical practice, and strategy, as a practice that requires direction, focus and alignment. Further, our study suggests that context matters to both dialogic and open strategy processes and challenges universalist features of dialogue. Specifically, dialogic OD and Large Group Interventions perspectives can offer useful lenses to incorporate contextual features. Finally, our implications for practice suggest that particular organizing principles of open strategy processes can foster a healthy dialogic process in terms of enabling ongoing, diverse and substantive interactions and inputs by stakeholders.

“Imagine a world in which every single person on the planet is given free access to the sum of all human knowledge. That's what we're doing.” Jimmy Wales¹

INTRODUCTION

Open strategy without dialogue would be a contradiction in terms since key features of an open strategy process such as transparency and inclusion (Whittington, cailluet & Yakis-Douglas, 2011) necessitate dialogic interaction. In this paper we explore how Wikimedia, an organization with a long-standing commitment to openness, participation, and transparency to its community of contributors, has developed a 5-year strategy through an open strategy process. We outline the dialogic perspective (Gergen, McNamee & Barrett, 2001; Isaacs, 1993; Jacobs & Heracleous, 2005), an apt but missing perspective from the literature on open strategy, and employ it to analyse Wikimedia's strategy process.

We define dialogue as communicative interaction between two or more parties, that serves to accomplish particular outcomes, as well as to shape agents' ways of thinking and acting through effectively understanding and sharing each other's perspectives. In this context, we employ textual data, including data from dialogic interactions, to identify features of Wikimedia's open strategy process as well as key dialogic attributes at different stages of the process. Given the early stage of research in open strategy processes (Whittington et al., 2011), and the lack of a dialogic perspective in this field, we pose the exploratory research question: what is the role of dialogue in open strategy processes?

In addition to conducting the first study of open strategy processes from a dialogic perspective, and providing implications for the practice of open strategy, we make two key conceptual contributions. First, we propose that open strategy processes can be viewed as Large Group Interventions (LGIs) (Bunker & Alban, 1992; 2006), and we show that various types of tensions are inherent in this processes. These tensions arise from the intersection of dialogue as a non-hierarchical, emergent, on-going practice between equals on the one hand (Gergen et al., 2001), and the domain of strategy, that from a traditional, planning perspective demands direction, focus and

alignment on the other hand (Andrews, 1971; Chaffee, 1985). In drawing from organization development literature to view open strategy processes as LGIs, we observe that open strategy and LGIs have significant similarities in their key features and challenges. These include the endemic dilemmas that arise in LGIs relating to actors' voice, appropriate degree of structuring of the process and the need to take account of diverse perspectives to arrive at a commonly shared direction for the future. These tensions noted in LGIs are not absent from open strategy processes, where they take a special form given the directive, focused, convergent qualities of traditional conceptions of strategy and the non-hierarchical, expansive and often divergent nature of dialogic approaches. These two domains exhibit different and often incompatible expectations and features. We argue therefore that tensions are endemic in open strategy processes and that they have to be understood and negotiated if such processes are to accomplish their goals.

Our second conceptual contribution is that we challenge the universalist qualities of both dialogic and open strategy approaches and suggest that further theoretical development of these fields will depend on customising insights to particular empirical contexts. We also suggest that dialogic organization development (Bushe & Marshak, 2009; Marshak & Bushe, 2009) has an inherently contextual nature that can help to advance our understanding of dialogic processes in different contexts.

Dialogic literature more broadly often posits "ideals of dialogic co-production" (Beech, MacIntosh & MacLean, 2010: 1352), conditions of dialogue such as ongoing information exchange by parties regarded as equals, a genuine interest in others' views, self-reflexivity, joint exploration of challenges, building convergence, and opening new avenues of being and doing (Beech, MacIntosh & MacLean, 2010; Gergen, 2001; Gergen, Gergen & Barrett, 2004). The implicit assumption is that such features are applicable in different contexts. However, we find that dialogue was guided and occurred differently, and had a different role, in each phase of the open strategy process at Wikimedia. The literature on open strategy is still in its infancy, but essential dimensions such as transparency and inclusion have been identified. So far, there is little understanding of how such

dimensions may play out in different contexts. We argue therefore that we need to conceive of dialogue as well as open strategy as contingent, context-dependent processes; particularly when outputs such as robust strategic plans are sought as outcomes.

OPEN STRATEGY-MAKING AND THE DIALOGIC PERSPECTIVE

Open Strategy-making as a Large Group Intervention

The concept of “open strategy” has emerged as a response to empirical developments in business models that challenge fundamental assumptions of traditional strategy-making, such as the assumed need to own and control value-creating resources (Chesbrough & Appleyard, 2007). In contrast, organizations such as YouTube, Linux and Wikimedia employ community-driven value creation where value capture can be either by the company (e.g. YouTube) or by the ecosystem (e.g. Linux and Wikimedia) (Chesbrough & Appleyard, 2007). Open innovation, the process of involving external parties in innovation processes or leveraging innovations occurring outside the organizational boundaries (e.g. Huston & Sakkab, 2006; West & Bogers, 2013) has been a conceptual and empirical precursor of open strategy. Traditional perspectives of innovation and strategy as occurring solely within firm boundaries have been challenged by developments in technology (Matzler et al., 2014) and new business models (Chesbrough, 2010), which enable and welcome new types of interaction and collaboration in value creation processes.

Involving a broader spectrum of internal as well as external stakeholders in strategy making has been enabled and accelerated by information and communication technologies, such as the internet and social media (Sieger et al., 2012), or in particular cases more specialist technologies such as Wiki software (Dobusch & Mueller-Seitz, 2012). Such technologies are embodied in material artefacts that shape strategy-making in significant ways, what Whittington (2015: S13) refers to as the “massification of strategy”. It has been argued that where strategy is crowd-sourced, crowds contributing to a common endeavor should be diverse so that their inputs are also diverse, should be independent (rather than directed or controlled) in arriving at those inputs; and finally accurate aggregation of inputs should take place (Stieger et al., 2012).

Matzler et al. (2014) propose a typology of open strategy based on two axes; whether the process aims to facilitate strategy generation or implementation, and whether it engages internal or external stakeholders; leading to four quadrants of open strategy processes. As we will argue, this is a useful typology but some instances of open strategy that involve broad scope of both strategy generation and implementation, and both internal and external stakeholders are difficult to categorize in this way.

Open strategy processes that involve a multitude of stakeholders can be seen as Large Group Interventions (Bunker & Alban, 1992), in that they attempt to meaningfully engage these stakeholders to collaboratively identify a direction for the future. Large Group Interventions (LGIs) aim to bring the whole system into the room to address complex problems that demand multi-stakeholder inputs, as Weisbord and Janoff (2005) describe in their work with IKEA to redesign the company's product manufacturing, production and distribution. The aim is not only to engage actors with a stake in a situation, but also to promote ownership and create a commitment to act to implement the jointly developed plans (Coghlan, 1998).

Despite the large number of approaches to designing LGIs (Bunker & Alban, 1992), there are commonalities. As Worley, Mohrman and Nevitt (2011: 405) note, "LGIs tend to have a common set of features, including a focus on the future, broad participation, an open-systems perspective, an intense period of planning prior to the meeting, information sharing, and a combination of divergent/creative as well as convergent/agreement processes". Challenges in LGI processes include the dilemma of voice (how to enable all actors to have a voice when a multitude of actors are involved and a limited amount of time available); the dilemma of structure (to avoid too much or too little structure, both of which can derail LGIs), and the egocentric dilemma (how to balance and integrate individual and group perspectives) (Bunker & Alban, 2006).

Worley et al.'s (2011) description of central features of LGIs can also describe central features of open strategizing, particularly the broad participation, future focus and planning prior to the process. An open systems perspective may not be explicit in open strategy processes or LGIs, but

it is nevertheless consistent with such processes. The challenges relating to voice, structure and perspective noted by Bunker and Alban (2006) are also present in open strategy initiatives.

A Dialogic Perspective and Open Strategy-making

The very possibility of open strategy however presupposes effective dialogue among the parties involved. In particular, the key dimensions of open strategy, transparency and inclusion (Whittington et al., 2011), require mutual and ongoing dialogic interaction between the organization and relevant stakeholders. Given that a dialogic perspective seems an appropriate lens for exploring the phenomenon of open strategy, it would be helpful to introduce it to the open strategy literature. In this paper we examine how Wikimedia employed dialogic processes to develop its strategy in an open manner, engaging over one thousand “Wikimedians”, agents at large who regularly contribute to its projects such as Wikipedia. Wiki technology is by its nature dialogical, as it enables both real time and asynchronous interactions among a large number of agents on particular points of interest.

At its simplest, a dialogic interaction involves two or more individuals exchanging information on an ongoing basis, with the aim of accomplishing a particular goal or building mutual understanding. As Mintzberg (1971) and subsequent studies have shown, the managerial work environment is largely verbal, discursive, and dialogical. Effective dialogue has been viewed as a useful way to accomplish a variety of organizational outcomes. These include strategic innovation (Jacobs & Heracleous, 2005), organization change (Hatch & Ehrlich, 2002; Skordoulis & Dawson, 2007), organizational learning (Oswick et al., 2000; Schein, 1993), executive education (McCambridge, 2003), and strategy implementation (Pye, 1995).

Perspectives on dialogic processes differ however. Drawing on a typology of discourse studies (Heracleous & Barrett, 2001), we can distinguish between functional, interpretive and critical views of dialogue. While this typology was developed to provide some structure to the broader, voluminous field of organizational discourse, we find that it can also usefully categorize different approaches and aims of dialogic studies. *Functional* dialogic processes focus on how dialogue can foster effective information sharing, recognizing other points of view, and facilitating particular

organizational outcomes (e.g. Powley et al., 2004; Pye, 1995). From this perspective “managing is about dialogue – listening and talking – and about ‘doing’ – taking action” (Pye, 1995: 445).

Organization change can be accomplished when the dominant discourses change; such discourses “emerge from a continuous, iterative and recursive process” (Grant & Marshak, 2011: 212).

Interpretive dialogic processes are concerned with how dialogue can open new vistas of seeing and being through an ongoing process of mutual exploration and reshaping of fundamental assumptions (Hatch & Ehrlich, 2002; Isaacs, 1993), within socially constructed realities (Gergen et al., 2004). Dialogue here is a “sustained collective inquiry into the processes, assumptions, and certainties that compose everyday experience” (Isaacs, 1993: 25).

Finally, *critical* dialogic processes aim to expose taken for granted power inequalities, inspire agents to take actions of resistance, and aid in agents’ emancipation from institutional constraints (Heath, 2007; Raelin, 2012). Dialogue is seen as “the genetic material for building a culture of democracy freeing people from institutional forces that limit their personal autonomy and leading to their acquisition of a collective consciousness” (Raelin, 2012: 819).

While analytically useful, these perspectives are not always as distinct as the typology suggests however. A key interpretive insight, that dialogue and more broadly discourse shapes ways of thinking and acting, is a shared assumption with functional and critical approaches, as can be seen for example in the argumentation of Grant and Marshak (2011). Further, a connection between interpretive perspectives and functional concerns can often be found in the employment of a dialogical perspective. For example Jacobs & Heracleous (2005), offering an interpretive perspective on how the functional goal of strategic innovation can be fostered, suggested that generative dialogue can facilitate strategic innovation through an ongoing interaction between diagnostic and generative moments, respectively involving critical reviews of existing mental models, and emergence of novel mental models.

The functional dialogic approach has affinities with what Bushe and Marshak (2009) label diagnostic organization development (OD). This is the traditional approach to OD, more objectivist in

nature, where the emphasis is on gathering information to diagnose issues and plan and implement appropriate change processes, with the objective on changing behaviors. This is contrasted with dialogic organization development, a more recent set of understandings and practices in OD, that is more interpretivist in nature. Organizations here are seen as meaning-making systems, reality as socially constructed, and the emphasis is on encouraging generating dialogue to foster change in mindsets and facilitate self-organizing organization change.

Table 1 offers an outline of functional, interpretive and critical perspectives on dialogue.

Table 1 about here

Drawing from both the functional and interpretive views above, and as noted above, we define dialogue as communicative interaction between two or more parties, that serves to accomplish certain outcomes, as well as to shape agents' ways of thinking and acting through effectively understanding and sharing each other's perspectives. Given the central role of dialogue in open strategy processes, the early stage of the open strategy field, and the paucity of research on open strategy from a dialogic perspective, our research question is: What is the role of dialogue in open strategy processes?

METHODOLOGY

Given the emerging nature of the open strategy theme and the sparseness of available literature, we carried out an in-depth qualitative case study (Eisenhardt, 1989; Yin, 2014) on Wikimedia's open strategy process. We saw the Wikimedia case study as an instance of phenomenon-based research, where little theory exists for a particular phenomenon of interest, and therefore such study can provide empirical and theoretical insights (von Krogh, Rossi-Lamastra & Haefliger, 2012). Further, we examine Wikimedia as an extreme or unique case (Yin, 2014) of open strategy, given the unprecedented extent of stakeholder involvement, and the scope and significance of this involvement in terms of the resultant strategic plan (Dobusch & Mueller-Seitz, 2012). This was therefore an example of theoretical rather than random sampling; examining a particular, selected

case that will likely lead to useful insights on the topic of investigation given its relevance to this topic and its exemplary nature (Eisenhardt, 1989).

Given Wikimedia's commitment to transparency, a broad variety of materials relating to its strategy-making process have been archived on the internet. We drew on publicly available documents (including calls for participation, inputs by volunteers, blog posts, webinars, interactions among agents involved in the process, and reports). We also conducted two email interviews of Wikimedia executives, Jimmy Wales (founder) and Philippe Beaudette (Director of Community Advocacy).

In addition, the research was informed by participant observation by one of the authors who initially acted as a project facilitator to the open strategy process, before being employed full time by Wikimedia. The other authors researched the strategy process via the voluminous public records of this process. The interaction of outsider and insider perspectives helped us gain a more rounded understanding of the process, control for interpretation biases that often accompany purely internal or purely external perspectives, and buttress the validity of our analysis and findings.

We first prepared a narrative of the process indicating the context, the sequence of key events and the main actors involved, which also informed our interpretation and analysis of the archived materials (Mauthner, Parry & Backett-Milburn, 1998). We proceeded to analyze the data through a coding process, beginning with open coding via iterative reading of the various documents through which initial themes emerged. We proceeded to axial coding where we aimed to understand the relationship among these themes and to group them into categories. Finally we carried out selective coding where we incorporated information relevant to the categories that emerged. The process followed the tenets of grounded theory (Glaser & Strauss, 1967), in particular the approach proposed by Gioia, Corley & Hamilton (2012).

Gioia et al. (2012) make the assumptions that organizational realities are socially constructed, that agents are knowledgeable about these realities and can be articulate about them, and that patterns should emerge from the data rather than be structured by concepts and theories

imposed a priori by the researchers. While we were sensitized by conceptual issues relating to open strategy and dialogue, following Gioia et al. (2012) we suspended judgment about this literature and instead gave primacy to the data. The second order concepts therefore emerged inductively based on first order communications as captured in the various data sources.

Through this analytical process we gradually reached an appreciation of key aspects of Wikimedia's culture as well as its open strategy process, as represented in eight categories: transparency, participation, collaboration, coordination, process design, context creation, community empowerment, and decision-making control. The first three categories (transparency, participation and collaboration) represented broader Wikimedia values that imbued the open strategy process. The next five categories represented particular aspects of how the open strategy process was operationalized. Figure 1 below shows the data structure that emerged.

Figure 1 about here

Table 2 below gives illustrations of the empirical data that led to each category. We selected the themes of transparency, participation and decision making control in order to show the potential tensions that can be occasioned when an open dialogic process intersects with strategy, where decisions between competing objectives need to be made.

Table 2 about here

Throughout the analytical process we were conscious of the relevance and role of dialogic interaction among the parties involved. We combined a coding analysis of textual data with exploration of the key features of the dialogic process, which enabled us to explore the role of dialogue during each phase of Wikimedia's open strategy process (Table 3 and Figure 2), as well as with respect to key parameters of the process (Table 5), as we outline in subsequent sections. This also helped us to clarify the role of dialogue in our discussion of implications for practice (Table 6).

The narrative of the process and the emergent categories were shared with the participant observer member of the authorship team who offered clarifications and inputs to the overall

findings, as well as specific factual information that added to our understanding. This member also offered insights based on their involvement in the open strategy process early on in the data gathering phase. This research therefore represents the fruit of an academic-practitioner collaboration, which aimed to understand the features of an effective open strategy process and the role of dialogue in this process, themes that are important to both communities.

WIKIMEDIA AS COLLECTIVE CREATION: COMMUNITY AND COLLABORATION

Wikimedia Foundation was founded in June 2003 as the umbrella, non-profit organization of hugely influential Wikipedia and its sister projects, with the aim of providing a governance structure to support their growth and development. Headquartered in San Francisco, the foundation had 191 full time employees in 2013², with its projects supported by 80,000 active, engaged editors around the world and by two million donations to a total of US\$44.6m in 82 different currencies in 2012-13³. Wikimedia is led by a Board of Trustees consisting of 10 members, assisted by an Advisory Board consisting of an international network of 22 experts.

Individual community members are the driving force behind the creation and functioning of Wikimedia Chapters, which are independent organizations aiming to support and promote Wikimedia projects within specified geographical regions. Chapters are governed by their own Boards of Directors or Trustees, and remain decentralized (Beaudette, 2012). Wikimedia's unique governance structure is characterized by community self-governance on the one hand through local chapters and volunteers, as well as the institutional umbrella of the Wikimedia Foundation on the other (Morell, 2011). Neither the founder, nor the board and other Wikimedia staff commonly intervene in content and local governance decisions. The Wikimedia board and staff bypass the community only in situations that demand swift action due to potential legal implications, for example (Konieczny, 2010); or to address continuous conflict and editing wars.

Registered contributors and users of Wikimedia sites wield various forms of technical power and social authority. They often join formal and informal subgroups dedicated to ideological, functional and content-related themes based on their areas of expertise or interest. Trusted

Wikimedians can apply for one of the many levels of volunteer stewardship, receive administrator rights, serve as “bureaucrats” on local projects or “stewards” in global roles with almost full access to wikis, user rights and groups (Forte, Larco & Bruckman, 2009). Communication and co-ordination within the global community is accomplished through a variety of online platforms: Wikimedia Meta-Wiki, focused wikis such as Wikimedia Outreach or Wikimedia Strategic Planning, local Wikimedia Chapter wikis, the Wikimedia Foundation Blog, Wikimedia Signpost and various mailing lists.

Over time various guidelines, policies and formal processes have arisen as a response to specific situations and pressures exercised by stakeholders (Forte et al., 2009). Written and edited by community members like any other Wikipedia content, they can be seen as dynamic and evolving collective-choice agreements⁴. Many Wikimedia projects aim for decision-making based on “consensus over credentials”, a fundamental principle that has been labelled anti-elitism. “Neutral Point of View”, “verifiability”, and “no original research” have emerged as Wikipedia’s non-negotiable, core content policies aimed at determining and implementing quality standards and control. “Verifiability” and “no original research” require that content published on Wikipedia needs to be based on reliable published sources; and according to the “neutral point of view” principle, articles must represent “all significant views fairly, proportionately, and without bias”⁵.

Contributors to Wikipedia are advised to apply the relevant etiquette, refrain from personal attacks, aim for consensus, avoid edit wars as well as act on and assume good faith. A process of dispute resolution has emerged involving inter-editor negotiation, formal mediation and, in case of user conduct disputes, if all other resolution mechanisms have failed, the enforcement of binding solutions based on arbitration⁶.

WIKIMEDIA’S OPEN STRATEGY PROJECT

Developing Strategy the Wikimedia Way – Transparency, Participation and Collaboration

Wikimedia’s strategic planning efforts began to take concrete shape after the first Board of Trustees was formed in 2004. Public brainstorming pages were created and users were encouraged to suggest strategic priorities to the board. Participation, however, was slim at the time⁷. By 2007,

Wikimedia's board undertook several additional strategic planning efforts: community wide, board, staff and project committees were formed, the foundation's mission and vision statements revisited, a basic SWOT analysis conducted and several resolutions passed.

At its April 2009 board meeting the board decided to take a fresh approach to strategy-making, drawing on the principles of building a transparent, collective vision, open collaboration and stakeholder involvement⁸. Both the Executive Director at the time, Sue Gardner⁹, as well as Michael Snow, the Chair of the Board of Trustees, made public statements supporting a collective, transparent, participative and collaborative approach to strategy-making. Snow noted that *"we recognize that we will not develop a consensus strategy that pleases everyone. We will need to make difficult decisions that may prove unpopular. But we believe that people who want to have a voice in the process, should be heard."*¹⁰

These early statements recognize the value that can emerge from dialogical processes that engage several stakeholders; they also are pragmatic, in highlighting that strategy involves difficult decisions and is likely to be controversial, even if it is developed in an open manner. This realization indicates the need for a governance process and thematic as well as participation boundaries placed around dialogical processes of open strategy formation.

The collaborative, participative approach ran into Wikimedia's veins¹¹. Philippe Beaudette, a facilitator of the strategic planning project and subsequently Director of Community Advocacy for Wikimedia, noted in 2009 that *"If we attempted to go off into a board room somewhere and design a strategy, it would most likely have been universally decried as not being 'the Wikimedia way' [...] Experience has shown that when things are 'imposed' upon the Wikimedia community they usually are not adopted wholeheartedly [...]"* (Beaudette, 2011). The themes of transparency, participation and collaboration that pervaded Wikimedia more broadly, and their constituent elements, are shown in Figure 1.

Designing the Process: Openness and Flexibility versus Structuring from the Center

Wikimedia strategy project facilitators realised that the process had to balance the tension between the opposing needs for flexibility and openness that was part of Wikimedia's DNA, with clarity and a structure able to inform and drive strategic decisions: *"We also need to make sure that we deliver results. There can and should be an on-going conversation about the details of this process, but we can't wait until we all agree on everything before moving forward. We have to be both open and agile, meeting our individual needs, being thoughtful and deliberative, and at the same time, moving to action."*¹² Beaudette clarified that the process was collaborative but not necessarily democratic: *"a democratic process was never a goal for this project. Rather, it was a community facing / community influenced process."*¹³

Wikimedia's open strategy process begun with a set of community principles that were introduced at the outset rather than being allowed to gradually develop as collective-choice agreements, as would have been typical for other projects of the Wikimedia movement. These principles encouraged users to edit pages and to exchange ideas, to anticipate particular decisions by convenors when needed despite the openness of the process, and to act in good faith in contributing to the process.¹⁴

Thirty-seven dedicated Wikimedians offered to become hosts (convenors) to the with the primary goal of creating and maintaining a user-friendly and productive wiki environment. Their work involved organizing and merging proposals, facilitating participation, welcoming new contributors, encouraging conversations and resolving disputes constructively. Coordination between hosts took place through a regularly updated to-do list. Utilizing Wikimedia's IRC channel infrastructure, they conducted regular chats where real-time discussions took place and queries from volunteers were answered. Following Wikimedia's quest for openness and transparency, summaries and entire IRC logs were posted online on the strategy wiki¹⁵. As a complement to the work of hosts, governance of the process was conducted through experienced users equipped with "sysop" (system operator or administrator) rights, the appointment of six "bureaucrats" and engagement of the Wikimedia

Foundation's steward team¹⁶. This process illustrates how self-organizing teams can achieve effective coordination, as shown in Figure 1. Also, the themes of process flexibility and clarity (comprising process design) in the same figure. These and other themes shown in Figure 1 continue to manifest in the description that follows.

Despite the open, collaborative nature of the process that was received positively by many Wikimedians, the top down initiation and shaping of the project (shown by the second-order themes of context creation and decision-making control in Figure 1) via structures such as task forces, challenged the established culture of community-led projects. Several members made critical comments about these aspects, followed by responses explaining why such a guided approach was necessary given the objectives of the process¹⁷. Such exchanges illustrate the tension between the need for central guidance and coordination of the process on the one hand, and norms of open, community development on the other. Table 3 below outlines the four phases of the process and the main actions taken in each, as well as the dialogical aspects of each phase of the process.

Table 3 about here

Phase 1: "Level-Setting"¹⁸ – Preparing the Infrastructure and Inviting Parties to Dialogue

A strategic planning platform called "strategy wiki" was created to facilitate the process of collecting, analysing and synthesizing relevant information at a central location. Wikimedia's project team established a shared knowledge base, "Wikimedia-pedia", which aimed to illuminate the larger context of the planning process and to support the identification of knowledge gaps. Wikimedia-pedia contained a collection of facts, existing research, and analysis relevant to the Wikimedia movement that could be accessed by everyone¹⁹. In addition, it contained interviews of advisory board members, members of the Board of Trustees, external experts, and Wikimedia Foundation employees outlining what they believed to be appropriate directions for Wikimedia²⁰.

The project team developed a template with a standardized proposal format and invited volunteers to submit proposals on what they believed were strategic issues that should be addressed. This is an illustration of the "community empowerment" theme shown in Figure 1. Once

published, a traditional wiki process was applied to polish, translate, debate, group, and merge the proposals. A box at the bottom of each proposal page enabled visitors at the site to rate it in terms of its priority, impact, feasibility and desirability from very low to very high. A page listing all proposals was introduced and the suggestions were categorized according to their aims. The page further provided an overview of the most active proposals, the proposals that received the highest ranking, and those which most contributors volunteered to implement²¹.

Even though the sheer size of the movement provided a large talent pool for Wikimedia's strategic planning efforts characterized by cultural and geographical diversity, recruiting volunteers from the community proved to be a challenge²². The project team heavily engaged in relationship building with individual volunteers as well as Wikimedia Chapter organizations, online and on a face-to-face basis. An "outreach plan" aimed at reaching as many of Wikimedia's stakeholders as possible early on in the process.²³ The launch of a broad Call for Participation on September 21, 2009 comprised the final milestone of Wikimedia's outreach plan. An appeal letter written by Wikipedia founder Jimmy Wales and Michael Snow was translated into 69 languages, highlighting the main ways in which volunteers could support the yearlong planning process. During the first year, in addition to online discussions, 31 face-to-face meetings took place in 19 different countries, from which minutes were shared online²⁴.

In terms of dialogical process, phase 1 involved the creation of the technical infrastructure for facilitating dialogue along the requirements of the open strategy process, invitation of the parties to engage, and the emergence of broad dialogic themes. The dialogic funnel starts off widely at this stage, and gradually narrows in subsequent stages.

Phase 2: Setting Dialogical Boundaries, Recruiting, and Performing Deep Dives

In October 2009, the Wikimedia Foundation appointed a Task Force Selection Committee comprised of 15 members, whose core responsibilities were to define the mandates and to select suitable volunteers among over 1,923 applicants. These individuals would be accountable for

reaching the aimed for outcomes by the 14 task forces related to the three emerging strategic priorities of sustainability, development and accessibility as depicted in Table 4 below²⁵.

Table 4 about here

The committee categorized the applications by individuals who offered to participate in a task force, most of which were received from India, followed by the United States, the Russian Federation, the United Kingdom and the People's Republic of China. The criteria were availability, country, fluency and specialty of applicants. 30% of task force applicants were offering to invest 10 hours or more into the process on a weekly basis²⁶.

Ultimately, each task force was comprised of 5-10 members, one of whom was in charge of the group's coordinative and administrative tasks; the working language was English. Even though the work of task forces occurred transparently on strategy wiki (apart from the financial planning task force which met by conference call) and theoretically everyone was allowed to participate, task force members were considered *"responsible and accountable [...] for seeing that the work is done and the deliverables are in on time"*²⁷. The task forces were advised to aim for decision-making based on consensus among all participants. Nevertheless, individual group members with final decision-making powers had been identified at the beginning of the process in order to address situations in which reaching consensus was not feasible²⁸. While receiving support from Wikimedia staff facilitators, the community members themselves were responsible for success or failure of the task forces²⁹.

Nevertheless and despite tremendous relationship building efforts by the project team³⁰, the deep-dives phase was initially less successful than had been hoped for, with only 9 of the 14 task forces delivering recommendations and only 4 of those being of the quality that had been anticipated³¹. Further engagement efforts then led to the required outputs. The foundation's deliberation on the causes for the initial issues led to diverse explanations ranging from design failures of specific task forces³², asking too much from volunteers³³, resource limitations of the project team (Beaudette, 2011), or driving away engaged volunteers by misframing the question³⁴.

In terms of dialogic processes, this phase involved the setting of dialogical boundaries, a narrowing down of the number of parties to the dialogue, and aimed for developing initial strategy outputs. The initial challenges with producing outputs of sufficient quality point towards the tension between the guided nature of the process that included task forces and particular deliverables under deadlines on the one hand, versus the more unstructured interaction process without any central shaping, that characterised Wikimedia.

Phase 3: “Synthesis” of Dialogic Outputs

The publication of the task force recommendations marked the beginning of the third, “synthesis” phase of the strategic planning project that took place between January and April 2010. Community members were encouraged to translate the recommendations in as many languages as possible and engage into further deliberation. In February 2010, a group of 20 contributors that had demonstrated particularly deep involvement in the strategic planning process formed a Strategy Task Force that was to serve as the central hub for further discussions. In order to maintain the openness of the process, everybody was free to join the task force through the end of February 2010. Membership, however, presupposed active participation and familiarity with a large amount of relevant background material. In four three-week cycles and with the help of a guidelines page defining the characteristics of movement-wide goals³⁵, the Strategy Task Force synthesized previous discussions, amounting to over 900 proposals and recommendations, into roughly 1500 content pages with a particular focus on the feasibility of their implementation. By the end of April 2010, this work had resulted in a first, rough draft for Wikimedia’s five-year strategic plan³⁶.

In dialogic terms, this phase involved the intensification of the dialogic process among an even smaller of parties, application of particular criteria to the ideas such as feasibility, and the delivery of detailed strategic outputs. Arguably, at this stage dialogic interaction was even more structured by the requirements of the strategy process, with the dialogic funnel becoming tighter and converging on particular themes and specific contributors.

Phase 4: “Business Planning / Call to Action” – The Dialogic Funnel Expands but Under Defined Parameters

During the fourth and final part of Wikimedia’s strategic planning process the community was once more invited to review and refine the five emergent strategic priorities of quality content, innovation, increasing participation, growing readership, and stabilizing infrastructure. Also, the community was invited to debate the rationales underlying the priorities, key indicators, possible targets and other measures.

In the last month of the project, Michael Snow and Jimmy Wales launched an official “Call to Action” to enthruse volunteers to implement the directions identified throughout the process: *“As we bring this process to a close, our biggest challenge is to put these ideas into action. Here on Wikimedia’s strategic planning wiki, you’ll find a list of action opportunities organized around the priorities they support. We’d like to invite you to volunteer for and take ownership of these action opportunities.”*³⁷

As the strategic planning process came to an end, Wikimedia launched a dedicated celebration page and encouraged contributors to share their experiences and thoughts about the process, award barnstars to committed volunteers and post a Virtual Champagne Toast. Volunteers that had been deeply engaged in the project and representatives of the Wikimedia Foundation commented on a variety of topics.

The final, official document of the yearlong strategic planning process, entitled *“Wikimedia Strategic Plan: A collaborative vision for the movement through 2015”* was distributed and published on strategy wiki in February 2011.³⁸ In correspondence after the completion of the strategic planning process, Jimmy Wales emphasized how *“all [...] investment at the Foundation is now driven by the strategic plan”* and noted that the project left him with the same insight that he got from Wikipedia itself many years ago: *“people can cooperate and can produce great value with harmony as long as some fundamental values of mutual respect are used to set the ground rules”* (Wales, 2011).

DISCUSSION: OPEN STRATEGY-MAKING THROUGH A DIALOGIC PERSPECTIVE

We started this study by asking “what is the role of dialogue in open strategy processes”? In Wikimedia’s case, the broad scope and genuine commitment to engaging stakeholders in dialogue in an open strategy process on the one hand, interacting with the need to align initiatives and make decisions centrally about what strategies were desirable as well as feasible on the other hand, led to tensions, as we illustrated in Appendix A. We believe that these tensions would be endemic to open strategy processes more broadly. This is because they juxtapose a dialogic process, with assumptions of equality among parties and emergence of joint visions and understandings, with the domain of strategy, a traditionally directive, structured endeavor. As our first contribution therefore we discuss below the endemic nature of dialogic tensions in open strategy processes, and the need to understand and negotiate them constructively in order to accomplish desirable outcomes.

As our second contribution, we highlight the need for context-sensitivity in dialogic theory as well as open strategy. “Ideal” features of dialogue are often noted in the literature, with the implicit assumption that these features are universal and applicable in all cases. We found instead that dialogue was guided and occurred differently, and had a different role, in each phase of the open strategy process. Key dimensions of open strategy such as transparency and inclusion (Whittington et al., 2011) may play out differently in different contexts, depending for example on the particular values of the organization and stakeholder expectations. Rather than conceiving of dialogue and open strategy as having universal features that would be applicable in any context, we need to start thinking of these as contingent, context-dependent processes; particularly when outputs such as robust strategic plans are sought as outcomes.

Our third contribution relates to implications for practice. The Wikimedia case poses valuable lessons for productively facilitating open strategy processes. We discuss six such lessons that arose from our case, and their effects on the dialogic process.

The Endemic Nature of Dialogic Tensions in Open Strategy Processes.

The dialogic process of open strategy-making at Wikimedia Foundation was imbued with a variety of tensions. Flexibility and openness on the one hand, versus structure and control on the other; broad participation of stakeholders versus selection of particular contributors to lead parts of the process and integrate ideas; aiming for a collective creation, but within clear, directed parameters. These tensions were occasioned by conditions of dialogue where interlocutors are seen as “equals within a conversational space” in on-going interaction (Gergen et al., 2001: 705) on the one hand, intersecting with strategy as a structured, hierarchical practice with clear expected outputs (Chaffee, 1985) on the other hand.

We argue that managing such tensions is almost an existential condition of open strategy. On the one hand, the “ideal” conditions for dialogue involve information exchange by equals, self-reflexivity, and a joint on-going exploration aiming to appreciate others’ points of view, build convergence, and to open new vistas of being and doing (Beech, MacIntosh & MacLean, 2010; Gergen, 2001; Gergen, Gergen & Barrett, 2004). On the other hand, strategy is an endeavor that involves tough choices between competing alternatives, resource commitment and alignment, defined timescales, and above all decision makers who have the authority and power to choose. The ideal conditions of dialogue and directive conceptions of strategy are different and potentially conflicting; yet open strategy processes bring them together in a precarious balancing act.

Wikimedia’s strategizing process employed both elements of open-based peer production as evidenced in offerings such as Linux and WordPress, combined with a more centrally guided process. Despite the open nature of the process, central guidance was occasioned by the nature of strategy as a discipline that entails clear choices among competing alternatives and allocation of resources to realize those choices within a process of implementation and monitoring, none of which can be naturally or easily achieved by open-source communities.

Such tensions are not unique to open strategy processes, but are characteristic of Large Group Interventions (Bunker & Alban, 2006) more broadly. As noted above, LGIs involve challenges of voice, structure and perspective. With respect to *voice*, Wikimedia case demonstrates that

through the use of technology, the voice of a multitude of stakeholders can be facilitated since there is much more leeway to contribute in comparison to an LGI that takes place within a limited amount of time such as a few days, with the stakeholders literally in the same room (e.g. Weisbord & Janoff, 2005).

With respect to *structure*, through a delicate balancing act of openness and participation but within directed parameters of process and required outcomes, Wikimedia negotiated the path between too little and too much structure. The online debates among Wikimedians on what many perceived as unprecedented direction by the centre may have acted as steam valves to externalise such feelings; but also gave Wikimedia the opportunity to explain why such direction was needed, given the need to develop a viable, implementable strategic plan.

Finally, with respect to *perspective*, and again via the affordances of technology in enabling continuous communication at a distance, a multitude of stakeholders were able to exchange their views and arrive at a commonly developed plan for Wikimedia's future. By adopting the Wiki software, an already established technology that stakeholders were comfortable with, Wikimedia mitigated several of the risk factors mentioned by Denyer et al. (2011) such as limited participation, cynicism and political use of the technology.

The Wikimedia case shows that such use of technology could contribute to addressing some of the inherent dilemmas of LGIs in terms of enabling the balancing of such tensions. Technology as an enabler of the second order theme of collaboration, and wikis as vehicles for the second order theme of transparency, appear directly in our data (Figure 1). Technology also appears indirectly in our data in terms of the existence of self-organizing teams where members are dispersed around the world, where technology is the only way to accomplish such self-organization (a dimension of the second-order theme of coordination); and infrastructure provision by Wikimedia (a dimension of the second order theme of context creation). Our findings suggest that LGI research could benefit from a more explicit focus on the role of technology in such processes; in particular, how technology can enable the balancing of inherent tensions in LGI processes.

“Ideal” dialogic conditions would be more likely found in open-based peer production where there is a lower degree of centralization rather than in traditional strategy processes. Dialogic tensions in open strategy processes are endemic, occasioned by the intersection of two practices (dialogue and strategy) that are not always mutually consistent in terms of their key features and expectations. Table 5 below outlines key features of the Wikimedia process, and relates these to the various dialogical tensions that were present.

Table 5 about here

We argued that tensions are an ontological feature of open strategy, given the juxtaposition between values of openness and participation, with the need for direction and choice demanded by the institution of strategy. In Wikimedia’s case, these tensions were constructively managed to lead to the desired outcomes. Further research could explore in more detail what kinds of tensions exist in different types of organizations, how tensions could be managed constructively, and what could potentially lead tensions to become destructive. Concepts such as organizational ambidexterity or paradoxes (Papachroni, Heracleous & Paroutis, 2015) may be fruitful in offering avenues for exploring such questions. Further, Gergen et. al.’s (2001: 682) concept of “transformative dialogue” refers to “any form of interchange that succeeds in transforming a relationship between those committed to otherwise separate and antagonistic realities ... to one where common and solidifying realities are under construction”. This concept may be particularly helpful to understanding and addressing tensions in contexts where stakeholders differ markedly in their views.

Context-sensitivity, Dialogic OD and Emergence.

Wikimedia’s open strategy process involved facilitated dialogue within the “container” to use Isaac’s (1993) term, both horizontally and vertically, and aimed for particular outcomes (an actionable strategic plan fit for purpose, based on broad inputs), in accordance with the functional approach to dialogue (Heracleous & Barrett, 2001). Our analysis shows that the dialogic process of open strategy was shaped by the objectives of dialogue, which were to produce a strategy in an open manner. The literature suggests that effective dialogue is a meeting of equals (Gergen et al. 2001)

involving “deep listening” and reframing (Marshak, 2004) and interspersed with both diagnostic and generative moments (Jacobs & Heracleous, 2005). When a directive, focused practice such as strategy intersects with dialogue however, the dialogic process is placed in the context of, and shaped by the requirements of that practice, as illustrated by Figure 2 below.

Figure 2 about here

Matzler et al. (2014) typologise Wikimedia’s process as aiming to facilitate strategy implementation (rather than strategy generation), and as engaging external (rather than internal) stakeholders. While indeed external engagement was crucial, Wikimedia’s employees were also actively engaged in contributing to and shaping the process. Further, the process aimed both to generate strategy as well as to engage stakeholders in its implementation. As our analysis shows, Wikimedia’s open strategy process was broad-ranging in scope and hard to categorize in terms of a two-by-two framework.

Further, Wikimedia’s long-standing values of transparency, collaboration and participation shaped stakeholders’ expectations of how the open strategy process should be carried out. Open strategy processes in other contexts may be shaped by different values and stakeholder expectations. An implication for dialogic theory as well as for open strategy is the need for higher context sensitivity in order to appreciate to what extent and how particular dialogical features manifest in practice; and how such features may be observed or challenged when the circumstances are not necessarily conducive to their functioning. Such context sensitivity may potentially be accomplished through all three dialogic paradigms based on Heracleous and Barrett’s (2001) typology. However the interpretive approach may hold the most promise in this respect, given its commitment to uncovering actors’ first-order perspectives and building on them to develop theory.

Taking the consideration of context sensitivity in dialogic theory further, Bushe and Marshak (2009) proposed the concept of “dialogic” organization development (OD) in order to distinguish an emerging practice of OD centered around interpretive, social construction assumptions in self-organizing systems from the more traditional, rationalist OD practice in the context of planned

change. Dialogic OD “emphasizes discourse, emergence and generativity” in local environments (Bushe & Marshak, 2014). As such, dialogic OD is inherently contextual and also consistent with the interpretive approach to dialogue (Heracleous & Barrett, 2001).

Bushe and Marshak (2009) suggested that differentiating dialogic from diagnostic OD would help us “avoid unknowing mixing and matching of diagnostic and dialogic practices that in combination may be inappropriate, out of alignment, or even counterproductive” (p. 363). Oswick (2009) however critiques this conceptual division between the two forms of OD as potentially counter-productive and suggests that these forms could be fruitfully combined in practice, beginning with dialogic OD to open up options, and moving to diagnostic OD to plan for change.

Our analysis has shown that Wikimedia’s process included elements of both diagnostic and dialogic OD; but not in the sequence Oswick (2009) envisages. Initial diagnosis and data gathering was consistent with traditional diagnostic OD. The attempt to co-create a future for Wikimedia through broad dialogue, creating and sharing a vision and common narratives, is consistent with dialogic OD in terms of its generative potential and emergence (e.g. Gergen et al., 2001; 2004). Indeed, a sequence of first diagnostic and then dialogic OD is seen by Marshak & Bushe (2009: 382) as “less plausible”. Therefore, in addition to illustrating the value of a dialogic perspective in open strategy processes, we also explore how variants of OD may manifest in practice as Oswick (2009) recommended. Taking account of the context, it is likely that the sequence employed at Wikimedia was related to the need to converge towards an actionable strategy rather than just seek stakeholder input, where the dialogic objectives influenced the mix and sequence between diagnostic and dialogic OD.

The presence of emergence within a “container” of a guided process at Wikimedia is consistent with the literature on emergent strategy (Chia, 2014; Mintzberg & Waters, 1985), exhibiting characteristics of what Mintzberg and Waters (1985) referred to as “ideological” and “process” types of emergent strategy. In particular, the multitude of Wikimedians involved in the process share common values of openness, transparency and collaboration; but these were only able

to produce a strategy when balanced with structuring and process guidelines, bringing some structure to the diverse perspectives and inputs. Chia (2014) warns against a “direct confrontational approach to achieving desired outcomes” (p. 15) since it can lead to resistance and undesirable side effects. He recommends that we recognize the “inherent potentiality” (p. 19) already present in social reality, that can allow change to happen. In Wikimedia’s case, this inherent potentiality was the active, engaged, participative multitude of Wikimedians, who were keen to contribute to developing the strategic plan through the orchestration provided by the adopted process.

Further research could take account of the fact that empirical studies in open strategy are still scarce. The present study of open strategy is the sole one to date from a dialogic perspective. It would be useful to know more for example about the features of open strategy and dialogic exchanges in organizations that have more traditional, hierarchical structures and values compared to Wikimedia. Given its inherent context-sensitivity, a dialogic OD perspective (Bushe & Marshak, 2009) as well as more broadly dialogical processes that are explicitly recognized as contextually embedded (Gergen et al., 2004) could fruitfully be employed to study open strategy processes.

Further, we do not yet know the degree to which open strategy is emergent or directed, and what shapes the balance of emergence vs direction. Are there certain elements that can be deliberate for example, and others that can be emergent, and what shapes this mix? Do configurations of emergence and direction change in different contexts and how? Open strategy research is in its infancy and such questions merit further investigation.

Implications for Practice

Wikimedia’s experience holds lessons for organizations that have a large number of stakeholders with genuine interest in the organization’s future as well as the means and motivation to be involved. These might include virtual networks where digital communication and networking are a way of life; non-profit organizations or public agencies providing public services who wish to gain or sustain legitimacy and involvement of stakeholders; purpose-driven networks or NGOs that bridge organizational and governmental boundaries such as health, education or transportation; or

communities, urban or metropolitan areas, regions, and states who wish to develop a common vision for the future by involving as many people as possible in the process.

In addition to the above however, corporations in competitive markets could employ such a process to inform politically contentious or complex strategic decisions involving adaptive challenges, which would benefit from stakeholder involvement and from engaging collective wisdom. Corporations that display flat network structures, knowledge-sharing cultures, a general outward orientation and a relational approach to leadership would be most suited to such an open strategizing process.

Organizations adopting an open approach to strategizing would need to find an appropriate balance between endemic tensions such as openness and control, or broad participation as well as selection. This could be achieved, as with Wikimedia, by setting the boundaries and objectives of the process, an overall framework to guide the process, involving a broad mix of contributors until synthesis, alignment and decision making between competing options are needed, and retaining final decision-making rights. Such a process does require senior management to change their strategy paradigm towards an adaptive leadership (Heifetz & Laurie, 1997) one. From this perspective, leaders acknowledge that they don't have all the answers to wicked, unstructured problems, and invite the collective intelligence of a broader set of relevant actors to reach broadly informed directions.

An open strategizing approach also requires effective, motivated participants who are willing to invest time and energy in the process. In the absence of monetary rewards, a value-based foundation and a genuine interest in the future of the organization would be needed for sustained involvement. Views will vary significantly among contributors based on their personal beliefs, experiences and stakeholder position. Thus, disagreements and conflicts are likely to occur and a process as well as common values would be needed to resolve them. A framework would be needed to ensure that contributions agree with the objectives of the organization, and would be feasible

and appropriate. The shaping role of the centre is crucial, leading to some hybrid elements of both networks and hierarchies.

Table 6 below outlines some key factors that emerged from Wikimedia's experience, and the corresponding dialogical effect of each of these factors.

Table 6 about here

The organizing factors that arose from our study such as incentives, participation and distributed leadership are in fact productive features that can be employed more broadly in organization change processes (Kotter, 1995). The dialogic features that these organizing factors link to, aim to maintain the health and vitality of the dialogic process in terms of the ongoing breadth and depth of diverse contributions to open strategy or more broadly organization change processes. While the tensions that can be occasioned by the juxtaposition of dialogical processes employed in open strategy with the more directive and often non-participative practices of traditional strategizing are endemic and still need to be negotiated, such organizing factors can help to keep tensions in check and make the process more productive.

Despite the challenges, the approach pioneered by Wikimedia holds promise as a way of engaging diverse groups of relevant actors in an organization's strategizing process. Diverse viewpoints can enrich the discussions, and implementation can be facilitated after broad engagement. An effective dialogic process of open strategy making can enable organizations to engage collective intelligence (Heifetz & Laurie, 1997) to identify, refine and address fundamental strategic challenges.

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Table 1
Three Dialogic Perspectives

| Dialogic perspective | View of dialogue | Relevant definitions | Selected references |
|-----------------------------|--|--|---|
| Functional | Dialogue as communicative interaction and sharing of ideas, serving as a means of accomplishing outcomes such as organizational learning, strategy implementation or organization change | <p>“Managing is about dialogue – listening and talking – and about ‘doing’ – taking action” (Pye, 1995: 445)</p> <p>“Dialogue is a mode of communication that builds mutuality through the awareness of others, use of authentic or genuine discourse, and reliance on the unfolding interaction” (Putnam & Fairhurst, 2001: 116)</p> | Powley et al., 2004; Putnam & Fairhurst, 2001; Pye, 1995; Schein, 1993; Skordoulis & Dawson, 2007 |
| Interpretive | Dialogue as shaping agents’ ways of thinking and acting through effectively understanding and engaging with each other’s perspectives; in the process giving birth to new ways of looking at and being in the world | <p>Dialogue is “a sustained collective inquiry into the processes, assumptions, and certainties that compose everyday experience” (Isaacs, 1993: 25)</p> <p>Dialogue is “a reflective conversational mode; a diagnostic moment where participants can review their existing mental models, and a generative moment where emergent mental models may be shaped” (Jacobs & Heracleous, 2005: 344)</p> | Beech, MacIntosh and MacLean, 2010; Bushe & Marshak, 2009; Hatch & Ehrlich, 2002; Isaacs, 1993; Jacobs & Heracleous, 2005; Osrick et al, 2000 |
| Critical | Dialogue as a reflexive process of exploration that can expose taken for granted power inequalities, dominance and institutional constraints, with the aim of fostering a critical consciousness and inspiring emancipatory or resistance-oriented actions | <p>“... dialogue is seen as the genetic material for building a culture of democracy freeing people from institutional forces that limit their personal autonomy and leading to their acquisition of a collective consciousness” (Raelin, 2012: 819)</p> <p>“Defining dialogue provides the very closure of a subject matter that dialogue resists; however, three dialogic themes contribute a priori constructs ... (a) dialogue as generative, (b) dialogue as grounded in diversity, and (c) dialogue as critical of power” (Heath, 2007: 149)</p> | Heath, 2007; Kersten, 2000; Raelin, 2012; Zoller, 2000; Hammond, Anderson & Cissna (2003) |

Table 2
Representative quotes for selected central themes

| Theme | Representative quotes |
|-------------------------|---|
| Transparency | <p>“As much as possible, work should be done in public, and be visible to all.” (Wikimedia Foundation, 2011b¹⁰)</p> <p>“Task forces will be working in a transparent way unless there is a critical reason to keep something confidential ... We would strongly encourage those self-organized groups to also work transparently on this Wiki, and ask that they report out their findings for the final, synthesis, stage” (Wikimedia Strategic Planning, 2011r²⁴)</p> <p>“The core tenet of Wikipedia (and all Wikimedia communities) is radical transparency and collaboration” (Email interview, Philippe Beaudette)</p> <p>“When the task forces begin to meet, they will do their work transparently and on this wiki, and any member of the community may join fully in their work” (Wikimedia Strategic Planning 2011r²⁴)</p> <p>“The fact that the project is being run in such a way as to maximize participation and transparency strikes me as a strong indication that there is sufficient harmony between the staff and the volunteer community to move forward productively” (User Peteforsyth; Wikimedia Strategic Planning, 2011r²⁴)</p> |
| Participation | <p>“Our principles for facilitating this process: Empower our community and stakeholders to participate...” (Wikimedia Strategic Planning 2011c²¹)</p> <p>“The more people who contribute to this process, the more meaningful it will be. We strongly encourage people to participate, and we will be thoughtful about ways to get more people engaged” (Wikimedia Strategic Planning, 2011x³⁵)</p> <p>“We want a representative segment of the movement’s stakeholders to participate in our process” (Wikimedia Strategic Planning, 2011a¹¹)</p> <p>“The mechanisms used to solicit input should be designed to be as open as reasonably possible...” (User Dafer 45; Wikimedia Foundation 2011b¹⁰)</p> <p>“...we ask that the strategic planning process be designed to include input from a wide range of sources, including Wikimedia volunteers and supporters representing a diversity of geographies and projects (Wikimedia Foundation, 2011b¹⁰)</p> |
| Decision-making control | <p>“Although we strive for an open decision-making environment, there may be times when decisions must be made by the convenors” (Wikimedia Strategic Planning, 2011e¹⁴)</p> <p>“We recognize that we will not develop a consensus strategy that pleases everyone. We will need to make difficult decisions that may prove unpopular” (Wikimedia Foundation, 2011b¹⁰)</p> <p>“...in some cases we actually said: OK, we are going to put together a committee, we will have this process open so everyone can contribute. But if there is some kind of conflict or there is a decision to be made and consensus is not being reached around it we will empower this group of people to basically make a decision” (Eric Kim, 2011²⁸)</p> <p>“You can’t have that principle [NPOV (Neutral Point of View)] in strategic planning ... Strategic planning is about making choices ... we knew that was going to be different from an open source project ... We knew it was even going to be different from Wikipedia. Because we could not use all of the same principles at strategic planning and so on that Wikipedia uses” (Eric Kim, 2011²⁸)</p> <p>“...a democratic process was never a goal for this project. Rather, it was a community facing / community influenced process. For that to work, you don’t need participative democracy” (Wikimedia Strategic Planning, 2011d¹³)</p> |

Table 3

The four phases, main actions, and dialogic process of Wikimedia’s strategic planning

| Phase | Actions | Dialogical process |
|-----------------------|--|--|
| Level-setting | <ul style="list-style-type: none"> - Creation of online platform for strategic conversations - Creation of knowledge base on Wikimedia to inform planning process - Outreach plan (call for participation) - Proposals for strategy projects invited, then debated by community - 3 emergent strategic priorities identified, and 14 task forces formed | <p>-Commitment to dialogue with Wikimedians and other stakeholders. Creating the technical infrastructure for facilitating dialogue, inviting parties to engage and allowing broad dialogic themes to emerge. Dialogic funnel starts off widely and gradually narrows in subsequent stages</p> |
| Deep dives | <ul style="list-style-type: none"> - Definition of mandate of 14 task forces - Selection of suitable contributors - Allocation of decision-making authority - Development of detailed strategy proposals | <p>-Setting dialogical boundaries, narrowing down number of parties to dialogue, aiming for initial strategy outputs</p> |
| Synthesis | <ul style="list-style-type: none"> - Formation of Strategy Task Force by 20 engaged contributors - Synthesis of prior discussions with focus on feasibility - Development of first draft of Wikimedia’s 5-year strategic plan with 5 strategic priorities | <p>- Narrowing and deepening of dialogic process. Intensification of dialogue among a smaller number of parties, application of specific criteria, creation of detailed strategy outputs</p> |
| Call to action | <ul style="list-style-type: none"> -Review and refinement of the strategic priorities, rationales, and measures - Wikimedia’s “theory of change” published - Call to action to implement proposals - Publication of final strategy document | <p>-Community review process applied to dialogic outputs, and final outputs made public. Dialogic funnel expands again but within clearly defined input parameters</p> |

Table 4
Strategic priorities and task forces

| Sustainability | Development | Accessibility |
|----------------------------|--------------------|-------------------------|
| Advocacy | Reader conversion | Offline |
| Financial sustainability | Expanding content | Local language projects |
| Alliances and partnerships | Wikipedia quality | Arabic |
| Community health | Technology | China |
| Movement roles | | India |

Table 5
Comparative parameters of Wikimedia’s strategy process, and dialogical features

| Parameters | Traditional strategy process | Open source peer production | Wikimedia’s strategy process | Dialogical tensions |
|-------------------------------------|--|------------------------------------|---|--|
| Leadership of process | Top-down, transactional | Relational, emergent | Relational, emergent, with boundaries set centrally | Facilitated open dialogue, but within “container”, aiming for particular types of outcomes |
| Communication flows/openness | Top-down, usually confidential process | Peer-to-peer, transparent | Peer-to-peer, top-down, transparent | Horizontal communications characterized by open dialogue, vertical communications guided by requirements of strategy |
| Structuring of process | Hierarchy | Network | Hybrid, both hierarchy & network | Network engenders open dialogue; hierarchy creates instrumental guidelines |
| Outcomes of planning process | Deliberate | Emergent | Hybrid, both deliberate and emergent | Strategy plan created, based on broad ranging dialogical engagement and delicate negotiation of tensions |

Table 6
Key success factors for open strategizing

| Organizing factors | Description | Effects on dialogical process |
|-----------------------------------|---|--|
| Recruit proactively | Identify relevant groups and invite their involvement. A higher number of engaged individuals mean more extensive and productive exchanges | Broadens inputs and expands perspectives engaged in process |
| Incentivize with symbolic rewards | Collaborative strategizing relies on voluntary participation, where social cues, relationship building and symbolic rewards are key. Monetary incentives, on the other hand, may foster competition rather than collaboration | Enhances participation to process in a way consistent with the values of the community |
| Actively moderate the process | Process design and coordination, and engaged relationship management can amplify positive network effects associated with open collaboration while minimizing the threat of unfavorable behavior | Ensures dialogic process occurs within parameters suitable to the intended outcome |
| Enable distributed leadership | Create micro-opportunities for volunteers to participate in designing and leading aspects of the process, which can lower the burden on organizational resources while serving as additional motivator for contributors | Enhances frequency and depth of dialogic process, creates opportunities for air time and individual inputs |
| Participate, listen and respond | Open collaboration does not negate management's role in the process which remains crucial. Participation, active listening, and engagement with contributors goes a long way towards positive outcomes | Maintains energy and trajectory of process by active engagement, shows appreciation to contributors |
| Customize | There is no one-size-fits-all approach; customize the process to your own stakeholder context, organization culture, and network | Ensures dialogic process is consistent with features and demands of context |

Figure 1
Data structure

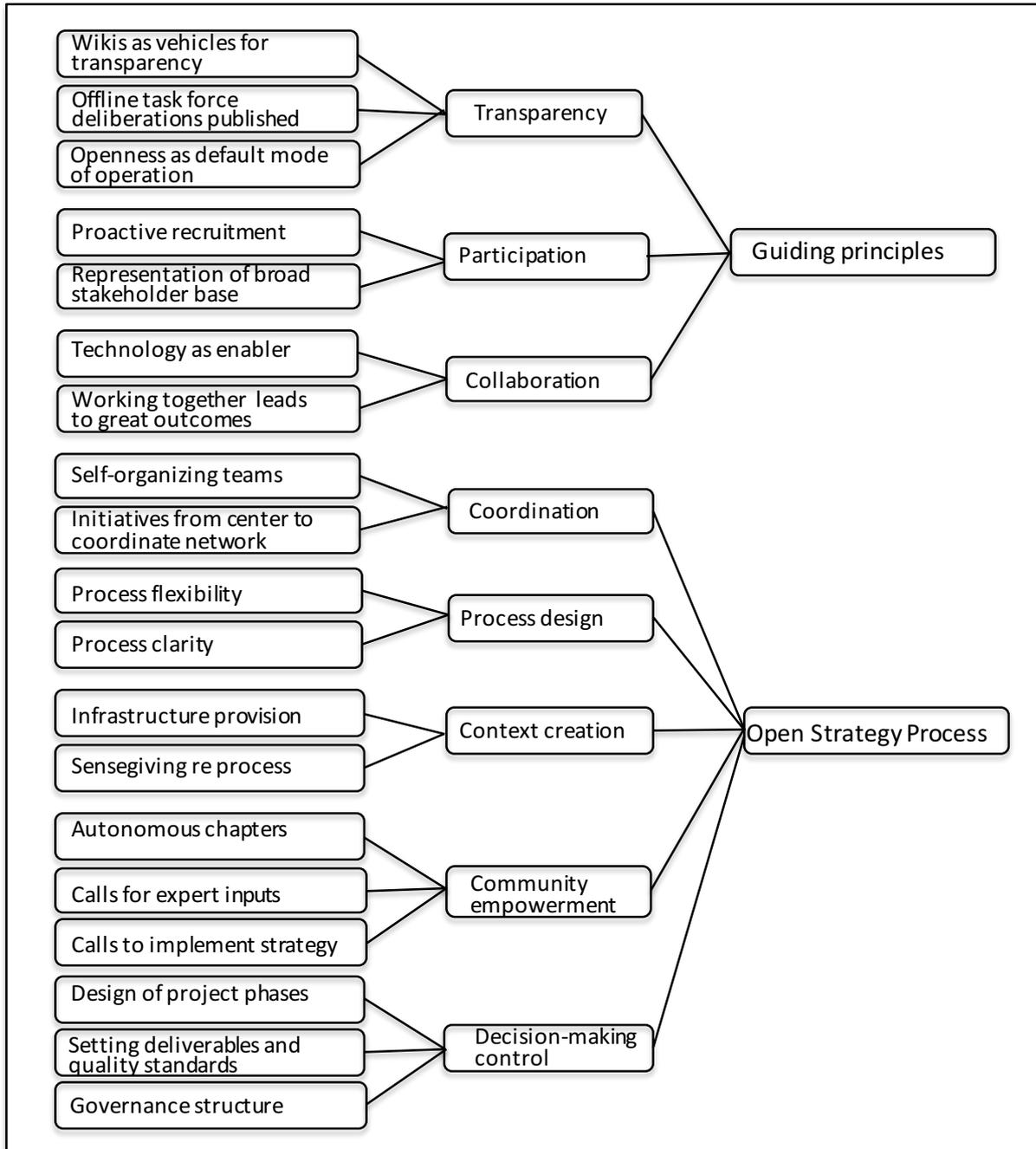
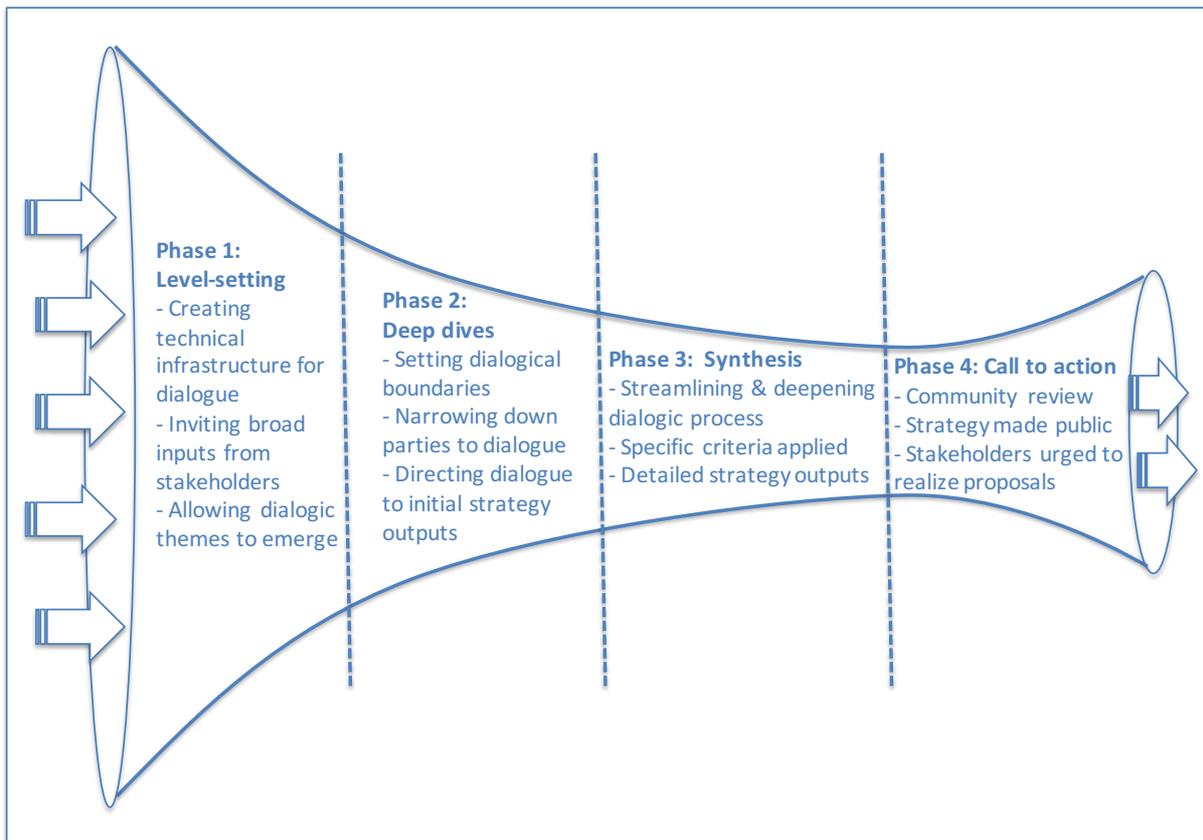


Figure 2
Dialogical process of open strategy at Wikimedia Foundation



WEBSITE CITATIONS

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- ¹⁸ "Level-setting" was a term used by the project team, and referred to getting all contributors on the same page about key aspects of the project.
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