PRECONFIGURED AND PERIPHERAL STRATEGIC PARTICIPATION:

DISCURSIVITY, MATERIALITY, AND EMBODIMENT

by

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DECLARATION

This thesis is submitted to the University of Warwick in support of my application for the degree of Doctor of Philosophy. It has been composed by myself and has not been submitted in any previous application for any degree. All data collection and analysis was performed by me.

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ABSTRACT

This thesis is located within strategy-as-practice, which is a strand of research within strategy. The study explores how material, embodied, and discursive resources enable or hinder strategic participation in strategy workshops as a site of practice. The research uses a practice-based lens to capture and examine video- and audio-recordings of the strategy workshops of a senior team at FinCo, a bank in South Africa. The study adopts a micro, fine-grained methodological approach to the study of strategic participation. At the time of the research, the bank had just launched their new strategy. The fieldwork was conducted six months after the launch during their "light touch" strategy planning phase. This provided a unique opportunity to observe a series of strategic episodes within the context of away strategy meetings as the site of practice.

Through the inductive analysis of data collected through observations primarily achieved through the use of video- and audio-recordings of strategy workshops, I developed a conceptual framework that establishes strategic participation as socially accomplished through two forms of participation: *preconfigured strategic participation*; and *peripheral strategic participation.* The study shows that these two forms of participation were engaged with six interconnected concepts. Preconfigured strategic participation consists of *expositioning*, *stance taking*, and *resolutioning*. Peripheral strategic participation consists of *preparatory meeting interaction*, *affiliative groups*, and *huddling*, which emerged as a purposeful constellation for strategic negotiation. Building on the findings, I suggest that these mutually constitutive concepts, which collectively contribute to the concept of *improvised adaptations*, result in reflecting while also acting as a way of negotiating strategic participation. Overall, the study contributes to the strategy-as-practice literature as it develops a nuanced understanding of strategic participation through the mobilization of discursive, embodied, and material resources.

ABBREVIATIONS

CEO	Chief Executive Officer
ExCom	Executive Committee
SA	South Africa
SMO	Strategy Management Office
SME	Subject Matter Expert
SFA	Strategic Focus Area
UK	United Kingdom

CHAPTER 1: INTRODUCTION

This thesis examines the role of materiality, embodiment, and discursive interactions in senior teams' strategizing. It adopts a micro, fine-grained methodological approach to the study of strategy formulation sessions at FinCo, a bank in South Africa. At the time of the research, the bank had just launched a new strategic plan and the fieldwork was conducted during their strategy formulation (test-and-adapt phase). This provided a unique opportunity to observe strategic participation. The study in its current form emanated from a time-and-motion pilot study at FinCo, which revealed that the majority of time at FinCo was spent by senior managers in meetings. The pilot study suggested that the radical changes that came with innovative approaches to banking meant that the organization's strategy should be responsive to the rapid change while staying aligned with the regulatory authorities that govern the banking sector. The impetus for choosing the banking sector as a place to explore how discursive, material, and embodied resources influenced away strategy meetings within a bank was inspired by the first multimodal study conducted on a trading floor of Lloyds bank and the second was the paucity in the literature regarding the strategizing processes engaged in multimodality in the financial sector (Jarzabkowski et al., 2015).

1.1 Theoretical Underpinning of the Research and Motivation

This study builds on the research foundations of strategy-as-practice scholars (Johnson, Melin, Whittington, 2003; Johnson et al., 2007; Jarzabkowski, Balogun, and Seidl, 2007; Whittington, 2003, 2006). Scholars in this field define strategy as a "situated, socially accomplished activity, while strategizing comprises of those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity" (Jarzabkowski, Balogun, and Seidl, 2007, p. 7). Therefore, the study explores how strategic participation is socially accomplished with a particular focus on the use of discursive, material, and embodied resources.

The primary purpose of scholarship within the strategy-as-practice programme is to "advance knowledge and understanding of strategy as something that people in organizations do, rather than only something that organisations have" (Seidl and Splitter, 2012, p. 1). The definition of who is a "strategist" depends on the theoretical lens and the context of one's study and how this is then refined as one collects and analyses data. Generally speaking, strategists can be one of, some, or all of the following: a CEO (chief executive officer) of a company (e.g. Brundin and Melin, 2006); top management teams (e.g. Kisfalvi and Pitcher, 2008); middle managers (e.g. Balogun, 2003); organizational members (e.g. Brundin and Melin, 2006); the board of directors (e.g. Brundin and Nordqvist, 2008); or consultants and project managers (e.g. Falkenberg, 2007).

Researchers in the strategy-as-practice community explore the micro daily activities performed and practiced by actors responsible for the practice of strategy. This has been termed as the investigation into what had been termed the "black box" of strategy. They analyse "how" strategy is practiced on an interpersonal micro-level and "why" these micro-activities influence the formulation, implementation, and evaluation of the broader strategy within organizations (Jarzabkowski and Spee, 2009). Therefore, the use of video- and audio-recording as a research technique has recently become a preferred form of data collection in studies aimed at conducting a systematic investigation of how multiple participants build action together. These situated interactions are typically identified through different kinds of semiotic resources that mutually elaborate each other through embodied symbolic interactions (Streek, Goodwin, and LeBaron, 2011).

Using strategy-as-practice theory as the theoretical framework underpinning the study, I adopted a framework from Hendry and Seidl (2003) in the analysis of meetings by identifying how the resources were mobilized from the time the participants arrived at the space where the meeting was taking place and across various phases of their strategic episodes. For this I employed Goffman's (1959) impression management theory, using the metaphor of a theatre, to enable me to analyse the interplay and how the resources are used in tandem. As a result, I employed a dramaturgical analysis to interpret the data and analyse the interaction among participants. Thus, Goffman's (1959) impression management theory, using a dramaturgical metaphor for everyday

interactions, was employed in the interpretations of the data to enable me to explore the interlacing of material, embodied, and discursive practices in strategy.

1.2 Background to Research Site

The research site used in my study was a bank based in South Africa that will be referred to in this study as FinCo (a pseudonym). Banking is a highly regulated and competitive sector within the finance sector. The development and implementation of the strategy requires those engaging in the strategic work to be both technically and legally sensitive to the context in which they operate, over and above having a competitive advantage to their competitors. Strategic management within the banking sector provides a dynamic industry to study.

FinCo is a bank that has four subsidiaries and 18 departments within it. The executive directors had recently engaged middle and senior members of the organization in a year-long process of developing an interdepartmental strategy that cuts across departments, deliberately centred around five strategic focus areas (SFAs). Each of the five SFAs consists of interdisciplinary departments, which together form strategy theme teams. The study began in September 2016, shortly after the new strategy had been launched in April 2016. The research draws on a detailed study of the practice at away strategy meetings. The study focuses on away strategy meetings which took place during a "light-touch" or test-and-adapt phase of strategic planning carried out by senior and middle managers at FinCo. The study specifically focuses on how the team negotiated their strategic participation prior to the start of the meetings and during the meetings, and how they reached their resolutions at the end of each engagement.

The presentation of the findings is based on circa 38.5 hours of a three-day away strategy meeting held by one of the six strategy cluster theme teams, including one subsidiary and one department meeting. The noted timeline emerged from the continuity of the three day away strategy meetings as well as the ability to track the effects that the consecutive process of the three days had on the meeting outcomes. Below is the rationalisation of the research question(s) that assisted in guiding the study.

1.3 Research Question

One sub-category of materiality in the practice of strategy is embodiment. Embodied performances and spatial arrangements through which strategists do their strategic work is crucial to an understanding of strategy-as-practice (LeBaron and Whittington, 2011). Unlike previous studies in the strategy-as-practice field that focus on discursive practices (e.g. Balogun, Jarzabkowski, and Vaara 2011; Rouleau and Balogun, 2011; Samara-Fredericks, 2003), there is still limited understanding of the role of bodily, material, and spatial aspects of strategic work in the accomplishment of strategic work (Jarzabkowski, Burke, and Spee, 2015). This thesis joins these recent endeavours to "go beyond discourse to consider how the material, in the form of both bodies and artefacts, is used to accomplish strategy work" (Whittington, 2012, p. 316). To that end, the study explores how discursivity, materiality, and embodiment, influence each other and shape the away strategy workshops as discerned from attendees' participation. This study therefore contributes toward the growing literature on discursivity, materiality, and embodiment in the strategy-as-practice field. My research question is:

> *How are embodied, material, and discursive resources mobilized to enable/ hinder strategic participation?*

The next section provides a brief overview on the study's potential contributions and implications in the demarcated area of interest.

1.4 Research Contributions and Implications

Briefly, the study contributes to strategy-as-practice literature with a particular focus on participation within away meetings. Extant literature has attracted criticism for its gaps pertaining to discursivity, materiality, and embodiment. In what has been termed the "material turn", scholars in the subfield have begun interrogating materials used in the practice of strategy (Leonardi and Barley, 2010). This is an expression of the multiple ways of packing and sharing strategy concepts and practices (Grand et al. 2004, p. 72). They transform strategy concepts into ideas and argumentative patterns

that stand as tangible modes of communication and references used by managers and researchers involved in the practice of strategy. The focus on "materials" used in the practice of strategy offers opportunities for further research in the role played by these mediums in the planning and implementation of strategy (Whittington, 2015). Therefore, I adopt a multimodal approach to examine the interplay of discursive, material, and embodied resources (Streeck, Goodwin, and LeBaron, 2011).

Consistent with the foregoing brief overview, this thesis can be seen as a response to the call made by Whittington (2006), which suggests that strategy-as-practice scholars should move beyond looking at discursive resources used in strategic work and also examine the use of material resources (Dameron and Le, 2015) and embodied resources in the accomplishment of strategy work. Therefore, this study builds on the work done by Jarzabkowski et al. (2015) and the suggestion that one should examine multiple resources in the engagement of strategic work. In this thesis, I aim to consolidate the insights gained from the said scholars' findings and their observations to foreground some of the theoretical and empirical contributions made by this study towards advancing what we know about strategic participation.

In that regard, the first main contribution entails the identification of the significant participation roles played within the pre-enactment phase during meetings. Strategy-as-practice currently considers the strategic interaction that takes place within the three phases identified by Hendry and Seidl (2003), which do not explicitly include the interaction that takes place moments prior to the start of an away strategy meeting. By drawing on a study by Mirivel and Tracy (2005) that distinguishes between five forms of pre-meeting talk, I was able to extend Hendry and Seidl's (2003) framework of strategic episodes in two ways.

Firstly, my findings confirm that the interactions that take place prior to the start of a strategic episode contribute toward shaping subsequent phases of the strategic episodes. The pre-enactment phase emerged as a phase within the meeting where the discursive use of premeeting talk took place, amongst a subset of participants attending the away strategy meeting, as discussed in Mirivel and Tracy (2005). This interaction prior to the start of the meeting was significant to strategic participation as it helped those facilitating the meeting to align their views on how best to navigate the

meeting. Furthermore, the interaction that took place prior to the start of the meeting hindered strategic participation as certain strategy artefacts or information determined the boundaries of the content available for discussion during the meeting. From this, I add to the understanding of how an extended appreciation of strategic episodes can shed light on the effects that these interactions may have on the rest of the meeting, which incorporates interactions outside the agenda.

Building on the above-mentioned findings, my study identifies two forms of participations, namely preconfigured and peripheral strategic participations. I present how the two forms of participation work jointly when it comes to how discursive, material, as well as embodied resources are mobilized to enable and/ or hinder strategic participation. What the findings show is that resources alone are not important but offer us the analytical focus from which to understand the mechanisms that contribute towards strategic participation. What emerged as being especially significant is that preconfigured and peripheral forms of participation work together and are both necessary in enabling strategic participation, because not all who are in attendance of the away strategy meetings have the same abilities to participate within the meeting. It emerged through the analysis of the data that various forms of access to strategic participation were used to influence strategic outcomes.

Thus, preconfigured and peripheral strategic participations have embedded within them the sub-components that contribute to the negotiation of power positions as well as facilitating possibilities of changing those various forms of participation. Instead, it emerged from the data that it is possible for participants to participate in both preconfigured as well as peripheral interactional regions of the meeting through an array of practices that shape the strategizing process. This was achieved through participation by finding ways in which to create formal forms of preconfigured strategic participation in order to create purposeful spaces for negotiating the object of strategic attention and then reinsert oneself through peripheral practices into preconfigured forms of participation in ways that influence the strategizing process.

Lastly, in addition to identifying the two forms of participation, I contribute to the strategy-as-practice literature as the findings show is that these two forms of participation are mutually constitutive through a concept that links them, which I term

improvised adaptations. In the context of this study, improvised adaptations emerged when shifts were made in participation from one form of participation to another. The term improvised adaptation was chosen to explain how participants interchanged their form of participation as they oscillated between a preconfigured form of participation and a peripheral form of participation through an improvised adaptation through the manner in which a material, discursive, and embodied resources were employed by participants.

Clearly, the aforementioned findings show that both preconfigured and peripheral forms of participation are important to strategic participation, not just as an indication of an alternative mode of participation within strategic meetings, but rather as a practice used to negotiate individuals' agency within meetings and the efficacy with which each attendee may influence the strategic outcome. Therefore, peripheral strategic participation enabled participants to engage in strategic processes that differed from those preconfigured by the strategy management office. Through these alternative and improvised adaptations, these participants were able to resist and/ or negotiate preconfigured notions of participation. They were also able to realign and/ or delineate approaches to strategic participation and repeatedly re-emerge within a form of preconfigured participation with a strategic stance from which they would engage in central forms of participation. Given the foregoing brief overview of the study's contributions and implications, I present below the thesis structure as signposts for the entire study.

1.5 Thesis structure

The rest of the thesis is structured in the following manner.

Chapter 2 provides a review of the theoretical underpinnings of this research. It outlines the key points of strategy-as-practice as developed in previous literature, with a focus on meetings, especially away strategy meetings. It then explores the understanding of the discursive, material, and embodied resources within meetings and how previous scholars have researched these to better understand how and why they contribute to participation within meetings. The chapter identifies strategic participation to explore areas for further exploration within strategy-as-practice as a

subfield. This exploration includes elements of the current theory of strategy meetings and shows two areas of participation where further investigation may be conducted regarding the simultaneous use of discursive, material, and embodied resources, and how these enable or hinder strategic participation.

Chapter 3 primarily serves to locate the study in the broad qualitative approaches and explains the methodological preferences of this research and how aspects such as research design, data collection, and analysis were used in the empirical domain. The research is grounded in a constructivist ontology and symbolic interactionist epistemology, which together form the philosophical underpinnings of the study. On this basis, the research design chosen was that of a single case study (Yin, 2009). The research setting is within the banking sector, which is eminently suitable to explore strategic participation in away strategy meetings. The use of video-audio recording is explained in depth to align maximally with the ethics imperatives of the study. The chapter provides the background of the organization and the three-day away strategy meeting upon which Chapter 4 is based. Chapter 3 then explains how the research methods were applied to conduct the study and how the data were analysed using inductive qualitative analysis. The chapter also draws on Erving Goffman's impression management theory to help illuminate the analysis and understanding of the phenomenon in question. The chapter concludes with a reflection of the research process itself.

Chapter 4 presents and analyses the empirical findings. The chapter seeks to provide an answer to the research question by exploring the influence of the simultaneous use of discursive, material, and embodied resources during away strategy meetings. It looks at ways in which participants used the resources to influence the strategic outcome. An analysis of the data shows that there were two forms of strategic participations that emerged during away strategy meetings. The first form was preconfigured strategic participation, which consists of three concepts: expositioning; stance taking; and resolutioning. The second form of strategic participation emerged as peripheral strategic participation, which consisted of preparatory meeting talk, affiliative groups, and huddling. Whereas preconfigured strategic participation showed how discursive, material, and embodied resources were employed in a preconfigured way aimed at having one strategic object of attention, peripheral

strategic participation was improvised and driven by the participants during forms of engagement that took place outside of the preconfigured structure of the meeting in instances of premeeting talk (Mirivel and Tracy, 2005). These took mostly the form of impromptu discussions during breaks.

Chapter 5 synthesizes through discussions the theoretical formulations in relation to the empirical strategy making at FinCo. As a result, I develop a theoretical framework that integrates the findings in a manner that illustrates how preconfigured and peripheral strategic participations emerged and how the mechanisms within them are mutually constitutive enablers and/ or hindrances to strategic participation. The developed theoretical framework illustrates how participants were able to resist preconfigured notions of strategic participation, negotiate preconfigured notions of participation, and realign or delineate approaches to strategic participation. It also shows how participants re-emerged within preconfigured forms of participation, having mastered a strategic stance from which they repeatedly engaged in central forms of participation.

Chapter 6 provides the discussion. This is useful to develop a better understanding of the practice of away meetings within strategy-as-practice. This chapter brings together all the themes discussed throughout the thesis, linking the findings to the literature, and detailing the contributions made by this study to the strategy-as-practice literature.

Chapter 7 concludes the thesis; in this chapter, I offer a summary of the key findings, the theoretical contributions to literature and the practical implications of the study. The chapter concludes with suggested avenues for future research identified through the study.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

The purpose of this literature review is to contextualize the study within the field of strategy. Specifically, the study is theoretically located within the strategy-as-practice research programme. In this literature review, I identify the perceived theoretical gap related to what is known about how senior managers negotiate their participation at strategy workshops. Therefore, this study explores the consequentiality of discursive, material, and embodied resources for strategizing. Overall, this literature review locates the phenomenon of interest within existing research while identifying the study's core and peripheral audiences (Pettigrew, 1990). Accordingly, I begin below with the chapter layout.

In Section 2.2 I discuss the development of the strategy management field, offering a genealogy from its theoretical inception in the 1960's (Chandler, 1962; Clegg et al., 2017; Floyd and Wooldridge, 2000) to the present day. This section is dedicated to examining how the concept of strategy has been used in the business world and its evolution into the field of strategy, under the discipline of management. It introduces the likes of Ansoff, Chandler, Andrews, and Mintzberg as some (but not all) of the founding scholars of strategy as a discipline within management studies. It focuses especially on how the planning, policy, and process schools of thought have contributed to the development of the field and how the process school of strategy has contributed to the development of strategy as practice (Golsorkhi et al., 2010; Whittington, 1996), which will be my primary focus and the context in which the study is located. The review in this section is not exhaustive but lays the ground for the discussion of the practice turn in strategy by acknowledging the contributions of these influential scholars.

In section 2.3, I examine the literature within the field of strategy as practice, because this subfield of strategy research is the theoretical basis of this thesis, and scholars

within this field are my core audience. According to Golsorkhi et al. (2010, p. 1), strategy as practice accounts for the "micro-level social activities, processes and practices that characterize organizational strategy and strategizing". I offer a summary of how this subfield of strategy, originating in Europe, has developed into a research programme widely recognized internationally among strategy scholars. I present the central themes of strategy as practice, including strategizing methods in contexts such as boardrooms (Liu and Maitlis, 2015), meetings (Seidl and Guérard, 2015), committees (Hoon, 2007), and strategy workshops (Hodgkinson et al., 2006). I also review literature from the social sciences, as I locate the study within the practice turn and focus on the practices adopted by strategists and the materials they use to orchestrate and shape the strategic outcomes of their work. In this section, I also review three interlinked dimensions of meetings: discourse, materiality and embodiment. These are explored as the constituent elements of meetings. I then review studies that have offered insights into these three key theoretical constructs upon which this study is built and how the paucity of related literature and importance of the collective study of these three constructs can contribute to our understanding of how senior team managers negotiate strategic participation in strategy workshops. Section 2.4 concludes this chapter, which, together with the preceding sections, provides a basis for posing the research question. Thereafter, the chapter's key points are summarized. As already mentioned in foregoing sections, strategy is the broader field within which the phenomenon of interest is located; the next section maps the field's terrain.

2.2 Strategy: Mapping the Terrain

In its formative years, strategy was not referred to as "strategy". It was classically known as "business policy" or "long-range planning" (Clegg et al., 2017, p. 8). In the 1960's, strategy became a "key issue concerning the long-term direction of an organisation" (Johnson et al., 2004, p. 3). It has since become widely known as the cornerstone both of organization studies and business management. The need for a concept of strategy dates to the end of World War II, as business developed from a relatively stable environment into a rapidly evolving and competitive environment (Bracker, 1980).

Although the importance of strategy is widely accepted, scholars within the field of strategy research do not have a single definition of strategy. Bracker (1980) identified three primary areas where authors in the field of strategy have major disagreements. The first is the breadth of the concept and what should be included in what is considered to be of strategic importance to business strategy. The second area concerns the elements that should be included and excluded in defining what "strategy" consists of. The third area relates to the inclusiveness of the strategy formulation process. For example, some scholars believe that there is no distinction between the formulation and implementation of strategy, as they are interconnected processes that collectively inform an emergent strategy (Mintzberg, 1990).

Where scholars and practitioners tend to agree is that a well-formulated strategy should enable organizations to marshal and allocate their resources into a feasible plan based on internal competencies and limitations, anticipated and unanticipated changes in the environment, as well as contingent moves by competitors. In this context, strategy is usually considered to refer to purposefully crafted plans that usher the organization towards an envisaged future, shaped and designed for the entire organization by senior managers and administered throughout the organization (Carter, Clegg and Kornberger, 2008).

However, strategy was initially analysed as something the organization has and owns, i.e. a type of entity. Strategy was also perceived as something crafted by the most senior members of an organization and implemented by those in lower-ranking positions (Whittington, 1996). In this approach, firms invest time and resources to focus on analysing environmental changes to inform their development plans and enable them to respond to these environmental changes. Such strategies create boundaries in determining what the organization does or does not do in response to various external changes.

Following the creation of such a strategy, senior members of the organization use it to inform the organization's (and its members') trajectory towards growth and outperforming its competitors. This notion of strategy being an entity (one skilfully crafted by the most senior members of the organization) informed the first of the four perspectives on strategy, the "planning" approach (Whittington, 1996). In the

following sub-section, I review the scholars who have contributed to the development of strategy. In that regard, Whittington (1996) identified four perspectives within strategy management that differ according to their organizational "target levels", namely the planning and the positioning perspectives, which constitute the content school of strategy. The review is not exhaustive as this is beyond the scope of this thesis; however, it offers an overview of the key arguments and their influences on strategy as practice. To do so, I present below the core contributions of each perspective, how their theoretical contributions informed practitioners' work, and discuss the limitations of these approaches and how the strategy-as-practice research programme addresses them through a practice-orientated view of strategy.

2.2.1 The Planning Approach in the Content School of Strategy

For over 45 years, there have been changes in the schools of thought that inform how organizations formulate, implement, and evaluate the strategies they develop. Many reviewers have traced the academic origins of strategy to the 1960's and attribute the development of strategy as a discipline to three influential works: *Strategy and Structure: Chapters in the History of the American Industrial Enterprise* (Chandler, 1962); *Corporate Strategy* (Ansoff, 1965); and *The Concept of Corporate Strategy* (Andrews, 1965). The planning perspective has informed scholars' prevailing view of strategy management that strategy is something that is created by the top management of an organization and executed at the bottom (Floyd and Wooldridge, 2000).

Originally, strategic management was approached with the notion that the field of strategy management research concerns the development of analytical aids that could help top managers determine appropriate strategies for their respective firms (Whittington, 1996). Based on these strategies, firms could then put in place the necessary implementation mechanisms to improve the organization's performance. Though perspectives varied, in most published research in the then emerging field, the formulation of a strategy focused on the *content* of the planned strategy and viewed strategy as a problem to be navigated by those in top management positions (Feng 2013; Floyd and Wooldridge, 2000).

One of the first scholars recognized for popularizing the term "strategy" is Alfred Chandler. Chandler wrote a treatise chronicling how "pre-industrial, small scale, family owned and rudimentarily managed enterprises" (Clegg et al., 2017, p. 8) experienced rapid growth after World War II. Chandler wanted to know how these firms later became "large-scale, impersonally owned bureaucratically managed multi-divisional structures by the early twentieth century" (Clegg et al., 2017, p. 8). This change in how organizations were run due to their growth led to the development of administrative coordination, which led to a need to develop major management controls. Chandler found that "rather than the size itself, increased complexity, from expanded geographic and product/ market scope (i.e., a change in strategy), accounted for changes in the organisational structure" (Floyd and Wooldridge, 2000, p. 2). This contribution influenced the early development of strategy as a field, leading scholars to focus on firms as the unit of analysis.

Furthermore, an analysis of the markets became an integral part of the information for those who formulate strategies. Chandler (1962, p. 13) defined strategy as "the determinator of the basic long-term goals of an enterprise, and the adoption of courses of action and the allocation of resources necessary for carrying out these goals". This led to a perspective of strategy research that focused on the top management of organizations as a unit of analysis for both Ansoff (1971) and Andrews (1971). It also suggested a sequential linear process from which the strategy is first centrally determined based on external factors, and then implemented through an appropriate organizational structure, and then evaluated.

Ansoff's (1965) viewpoint was that strategic development is not something that can be delegated downward but is rather an important aspect of the top managers' role. His book, *Corporate Strategy* (Ansoff, 1965), was written to inform the work done by working managers and help them develop a practical method for strategic decision-making. He made it explicit in his monograph that he saw the "CEO, board members, the president, the chief financial officer, and the planning staff which report to them" (Ansoff, 1965: ix) as the key people responsible for the strategic decisions made in organizations. This aligned with Chandler's managerial class and further limited what was known about the roles played by those in less senior positions within the organizations.

Ansoff (1965) contributed to the development of strategy management in terms of how strategy began to be viewed as a centralized activity within the organization. He defined strategy as "a rule for making decisions determined by product/ market scope, growth vector, competitive advantage, and synergy" (Ansoff, 1965, p. 118). In addition, Ansoff developed a lexicon of strategy-related terms that later informed the foundations of strategy management. Ansoff (1965) further developed a system to help executives make strategic decisions, which helped them frame strategic processes as a problem for top management. This view influenced the planning perspective of strategy, emphasizing strategic decisions being made by, and belonging to those only in organizations' top management.

Similarly, for Andrews and his colleagues, strategy is "the pattern of objectives, purposes, or goals and major policies and plans for achieving these goals, stated in such a way as to define what business the company is or is not to be in and the kind of company is or is to be" (Andrews et al., 1969, p. 15). His pioneering work perceived strategy to be "the study of functions and responsibilities of senior management" (Andrews et al., 1969, p. 3). Andrews' work built on the work done by Ansoff and aligned with that of Chandler, making a distinction between the formulation and the implementation of corporate strategy. Treating the formulation and implementation of strategy as two separate aspects was based on the assumption that the process of creating a strategy was a rational and objective "sequential process in which a centrally developed strategy is deliberately implemented" (Floyd and Wooldridge, 2000, p. 4). Table 2.1 presents a summary of how these three scholars helped establish what would later be referred to as the "top management perspective" of strategic management.

Table 2.1. Chandler's, Ansoff's, and Andrew's contributions to what would later be referred to as the "top management perspective" of strategic management.

Author	Contribution	Implication
Chandler	Structure follows strategy	Sequential views of strategy making
	Distinguishing strategic from tactical administrative tasks	Identification of strategic tasks with top levels of organizational hierarchy
	Allocation of resources key to organizational success	Credits top managers with success of organization
Ansoff	Practical system of making strategic decisions	Frames strategic process as problem of top management decision-making
	Match between organization and its environment	Uncertainty and imperfect information require that strategic decisions be made at the top
	Strategy defined the nature of an organizations' business	He suggested a focus on strategy formulation than implementations
Andrews	Separates formulation from implementation	Solidifies strategy process sequence
	Strengths Weaknesses Opportunities Threats (SWOT) analysis	Presents formulations as "analytically objective"

Source: Adapted from Floyd and Wooldridge (2000, p. 7).

Collectively, Chandler, Ansoff, and Andrews are considered influential in the development of what later became known as the "planning school" of strategy, the primary tenets of which initially identified how external factors influenced the structure of the organizations as well as how this in turn informed the strategy of the organization. This school of thought also emphasized that senior managers should create the strategy, as it applied a "top management perspective" to strategy creation. The development of the planning approach helped provide decision-makers with tools to help them reduce the complexities of underlying strategic issues. These helped companies develop "long-range planning" and budgeting systems as well as the management of these systems became a dominant focus for senior management (Hamel and Prahalad, 1994; Hedly, 1977; Porter, 1980).

However, a common critique of the planning approach to strategy formulation and implementation is its inability to respond to emergent issues that arise during the linear process of strategy formulation and implementation (Floyd and Wooldridge, 2000). These systems require managers to develop five-year plans incorporating projected income and operating budgets. Due to the strategic plans being made years in advance, they are often unable to fully respond to the rapid changes taking place in the industry. When these emergent aspects of strategy arise, organizations find themselves challenged regarding how they can take these external and internal variables into consideration and accordingly align the already complete strategic plan. Some of the predictions made during the planning can be dispelled during the implementation of the strategy, thus disrupting the strategic process. By the 1970's, frustration had grown regarding the amount of time, resources, and challenges that the implementation of long-term plans entailed. This gave rise to the "positioning" perspective in the late 1970's, which will be explored in the next sub-section.

2.2.2 The Positioning Approach in the Content School of Strategy

Michael Porter is a scholar recognized for contributing significantly to the development of the systematic approach to the formulation and implementation of strategy. Porter was a great advocate of a "rationalist analysis, based on the Industrial Organization approach" (Clegg et al., 2017, p. 11). Porter's (1980) monograph, *Competitive Strategy*, was highly influential and shaped how managers considered their respective firm's strategy in relation to their competitors (Floyd and Wooldridge, 2000, p. 8). Porter (1980, 1985) proposed that it is the structure of the industry that is key to the organization's performance, which is measured by how profitable the organization is. Porter's (1980) Five Forces model offered practitioners and scholars a generic approach to navigating through industry opportunities and threats. These five forces allow for the analysis of competitors' strategy and provide a classification of competitive strategies that organizations can then apply to position themselves and compete in the market. This framework suggests that the aim of the strategy should be to reduce the power of the competitive forces faced by the organization in the industry in which it is competing in (Porter, 1980).

Accordingly, the positioning perspective focuses on the content of the strategy and on where senior executives want to place their product(s) within the market. In this form of strategic planning, top managers need to focus on where they intend to position their product(s) to maximize market competitiveness. To this end, an array of strategic tools has been developed in addition to Porter's Five Forces model, including the Value Chain as well as the Boston Consulting Group's product portfolio matrix.

Similar to the planning perspective, the positioning perspective helps in the development of long-term strategic plans. However, the positioning perspective has received criticism for its primary assumption that the market will remain as is throughout the planning and implementation of the strategy. It does not take new entrants in the market into consideration and it does not account for the internal changes that may take place in a business. By the 1980's, the strategy-management field was embedded within macroeconomics as the "scientific" foundation upon which strategies were developed. Both the planning and the positioning perspectives thus focus mainly on responding to the external environment.

The planning and positioning perspectives were later criticized as they do not take into account that organizations should acknowledge and acquire internal tangible and intangible resources as part of their competitive advantage. Resources are defined as "the stocks of tangible and intangible assets that can generate values" (Clegg et al., 2017, p. 80) and include capital, labour/ human capital, land, and knowledge/ organization. Penrose (1959, 2009) suggested that a firm's focus should be on building internal resources to allow them to compete with their competitors. However, Wenerfelt (1984) built on Penrose's work and suggested that strategy should be understood according to how well the internal resources are managed. This perspective was later referred to as the resource-based view with which I conclude the content-based strategy approaches to then discuss the process based school of strategy as follows.

2.2.3 The Process School of Strategy

From the 1970's onwards, other researchers have focused on the content of specific strategies and the strategy-making processes that inform them. This is known as the

process perspective. Scholars within this perspective have suggested that, to improve strategy making, those involved in the strategy must be able to create better strategy-making processes. This shift in perspective advanced the discipline of strategic management by bringing to the fore the people and processes they engaged in over prolonged periods of time, as well as continuous learning (Pettigrew et al., 2006, p. 12). From the process perspective, the linear rationalistic approach to strategy formulation does not match the everyday experience of managers and the work they do. Scholars in this approach have focused on examining the processes of strategy formation and strategic planning from within the firms they are studying for a prolonged period of time, spending time with managers in these firms and observing their daily routines (e.g. Mintzberg et al., 1976; Pettigrew, 1977).

For example, Mintzberg (1973) conducted fieldwork with five managers by following them over the course of their workday to observe what managers actually do and asking them to keep diaries of their work. He found that the everyday experience of managers was dissimilar to their own ideas of what they actually did as managers. They noted mundane issues and ad hoc interactions during their day, which were improvised and diverse. This was different from what managers had thought about themselves and offered insights into the real world of work in the life of a manager.

Mintzberg was influenced by Herbert Simon's idea of "bounded reality" (Simon, 1945, 1960). Simon (1945) suggested that managers within organizations make strategic decisions based on the evidence available to them at a particular point in time, which is "bound" in their "reality". Mintzberg emphasized that strategies can be intended and planned (as per the planning school) but suggested also that they are emergent and unrealized (Mintzberg, 1979). From this viewpoint, strategy can be constructed in a retrospective manner and its formulation and implementation are not as clearly separable as previously suggested by the planning school of strategy. Rather, Mintzberg suggested that these processes are interwoven over time.

Similarly, Andrew Pettigrew (1977) was also developing a process perspective to strategy, suggesting that emphasis should be placed on the implementation of a strategy as opposed to its formulation (Clegg et al., 2017, p. 324). The focus of the process school to strategy was based on three key elements of strategy: the *process*,

together with the management of change (referred to as the "how"); the *content* of the strategy (referred to as the "what"); and the *context* in which the strategy unfolds (referred to as the "why") (Pettigrew and Whipp, 1991).

Scholars within this process perspective have analysed organizations at the firm level, which has enhanced what we know about the process of strategy management through the observation of the daily routines of the people implementing these processes. The foundations of the practice school to strategy are based on many of the insights from the process school. The work done by Pettigrew and his colleagues was thus a precursor to the development of the strategy-as-practice approach (Clegg et al., 2017; Whittington, 1996) as discussed below.

2.2.4 Practice School of Strategy/ Strategy as Practice

The practice school draws on many insights from the process school, especially the resource-based view's focus on the skills found within a firm. Furthermore, the practice school of strategy returns to the analysis of the "managerial class" of workers within a firm. Through a practice lens, what matters most in strategy are the people responsible for the strategic work within organizations. It concerns itself with how strategists strategize (Hendry, 2000; Jarzabkowski, 2003; Whittington, 1996, 2006). According to Jarzabkowski, Matthiesen and Feldman (2009), the practice turn in strategy research performs an ontological reversal from an understanding of strategy and structure as mostly stable entities – comprising specified roles and relationships between actors and activities that are changed from time to time – to an understanding that strategy and structure emerge in the interactive exchanges between actors.

However, the practice theory itself is not a single unified theory (Nicolini, 2012; Sandberg and Tsoukas, 2015), but rather one that comprises a collective of theorists who focus on practices within social theory from diverse ontological and epistemological points of views (Orlikowski, 2015). Having grown dissatisfied with the absence of the people who engage in strategy work and the effects they have on the strategy processes and outcomes, strategy-as-practice scholars have endeavoured to focus on firms' internal resources in a similar way to the resource-based view of strategy (Johnson et al, 2003, 2007). The premise of this research programme is that

strategy research should account for the presence of human actors' strategy management and that strategy research should shift from being "populated by multivariate analysis of firms or industry-level effects upon form performance" (Jarzabkowski and Spee, 2009, p. 69) to examining the people working within these firms.

Thus, practice is a concept that enables researchers to interact with practitioners (Golsorshki et al., 2010). Studying practices enables scholars to explore what people do when working, and the relationship between individuals' agency within the structure, i.e. the social institution. Some of the important issues to those who engage with strategy are brought to the fore through an analysis of the language used in the strategy-making process, as well as the individual attributes of those engaged in the strategic work and the patterns that emerge through their interactions and how these shape the strategic outcomes. Thus, research under this broad umbrella undertook "to accomplish something which is rare to contemporary management and organization research; to advance our theoretical understanding in a way that has practical relevance for managers and other organizational members" (Golsorshki et al., 2010, p. 1).

The significant shifts made by scholars within the practice approach are threefold: shifting away from the economic ideas of strategic management; shifting away from the organizational level of analysis (this also represents a shift from external factors to the firm being classified as the essential phenomena of interest, represented by a shift in focus toward an internal micro-phenomena approach); as well as the shift from a focus on the "core competencies" of the corporation toward the "practical competence of managers" as strategists. Therefore, the key focus of the practice approach is on how those engaged in strategy work conduct their strategic work. Similar to the planning school (in its formative years), its focus is on the managerial level of workers within organizations. It is also aligned with the resource-based view of strategic management from the process school as it sees the people who engage in strategic work as an important resource for the organization.

Strategy as practice also complements other previous schools of strategy; for example, long-range planning, which is held in high regard in the planning school of the strategy and is still of interest. However, within the practice school of strategy, the emphasis

is on how the micro-interactions and incremental forms of talk lead to what was later developed into the strategy document *in situ*;. This emphasizes strategy-as-practice scholars' view on the outcome of the strategizing the processes, practices, interactions, and discussions engaged in by strategists that result in the outcome of a strategic plan.

Whittington (1996) suggests that the paradigm shift presented by the practice school implies a need for a change in the perspectives of strategy for three major stakeholders within strategy management. Firstly, practitioners of strategy are called to review their work and the consequences of the mundane details through a practice lens. Through research methods including interviews, diaries, participant observations, and surveys, practitioners become participants in studies. Such studies help to inductively and deductively analyse the patterns found in their work and the implications these have for their work. Secondly, and at a pedagogical level, academics are encouraged to teach strategy as a practice because, when teaching SWOT analysis alone, there is no opportunity to examine the human dynamics that influence the inputs and the process followed in populating the information contained in the complete analysis. Finally, the practice school presents a significant change for research within the strategy management field, as the phenomena of interest, and how it is studied. It changes from being a macroeconomic perspective to a more micro and interactive perspective. Accordingly, the practice school provides opportunities for scholars to gain access to practitioners, thus narrowing the gap between researchers and practitioners. Such studies are conducted while strategists are conducting their work, which has led to a shift in the methods used to research strategy in that more scholars are applying social and practice theories [1] to their work and incorporating methods from the social sciences and humanities, anthropology, and sociology to shed light on phenomena previously ignored.

The notion of strategy advanced by the strategy-as-practice approach portrays strategy as an activity: "strategy" (Jarzabkowski, 2004, p. 529) is not only an attribute of firms,

[1] Strategy as practice was established on the philosophical traditions of social practice theorists, which Postill (2010) categorized into first-generation theorists (for example, de Certeau, Bourdieu, Foucault, Garfinkel, and Giddens) and second-generation theorists (for example, Pickering, Reckwitz, Rouse, and Schatzki).

but also an activity undertaken by people. The practice school implies a change in perspective for practitioners and for teachers (Whittington, 1996). For example, at the organizational level, practitioners engage with researchers in ways that mean working alongside them through job shadowing, talking with them as if they were being interviewed, observing and taking time to reflect, through diaries, on how their interactions and activities affect the outcome of their work. Through the practice lens, aspects of strategists' work previously considered mundane are now considered issues of great importance. As an example, the aspect of who held the whiteboard marker during the discussion was not previously considered as significant in relation to the outcome of their work. Overall, this shift toward the practice lens allows what was tacit to become explicit. This is achieved through the application of different theories and methodological approaches compared to previous, mainstream approaches to strategy.

This new school is not, however, without its critics, particularly by scholars from North America where most of the previous schools were developed and who perceived the practice approach to strategy as a primarily European school of thought (Carter, Klegg and Kornberger, 2008; Jarzabkowski and Kaplan (2010). One of the main criticisms received on the practice approach to the study of strategy is that it seems to suggest that, within management studies, the study of "key strategic practices" and their "practical" importance is something new. This suggestion was vehemently refuted by Carter, Klegg and Kornberger (2008), who cited the work of Garfinkel (regarding the development of workplace studies as a research programme), of Fayol (regarding management or principles), and of Taylor (regarding the close observations of factory workers), emphasizing how their contributions led to the development of many industrial innovations and practice-related developments.

Acknowledging these criticisms, among others, strategy-as-practice scholars further developed the theoretical, ontological, and epistemological foundations of the research programme with the development of numerous handbooks, publications, conferences, and symposia aimed at developing strategy-as-practice research. In the following sub-section, I present the definition of strategy as practice and its defining characteristics as a research programme. I also locate strategy as practice within social theory and

review the effect that the discursive, practice, and material turns have had on the central themes studied within strategy as practice.

2.2.5 Definition of Strategy as Practice

One of the main defining qualities of strategy as practice is its focus on the micro-level aspects of processes and practices, as well as the interactions and activities engaged in by practitioners (Whittington, 2006). The primary aim of scholars within the strategy-as-practice research programme is to understand "how" strategy is practiced on a daily basis and "why" these practices influence the strategic outcomes. As such, it offers explanations of micro-activities that enable the achievement of the broader strategy (Johnson et al., 2003).

Scholars in this sub-field argue that strategy is not something organizations "have", but rather the accumulation of actions which together constitute "strategy". From this perspective, strategy is what people within the organization "do" as they endeavour to achieve the organizations' strategic goals. From this practice-based view, there has been a shift toward a people-centred approach to strategy, with the primary focus being the activities that inform their practice regarding strategy work (Balogun; 2003, 2006; Jarzabkowski 2005, 2006; Kaplan, 2001; Langley, 1999, 2007; Mantere 2005, 2008; Whittington, 2006). In the words of Jarzabkowski and Kaplan (2010, p. 51):

> "Strategy as practice research is premised on the notion that all social life is constituted within practices, and that practices and practitioners are essential subjects of study. Applying this lens to strategy foregrounds the mundane, everyday work involved in doing strategy. In doing so, it expands our definition of the salient outcomes to be studied in strategic management and provides new perspectives on the mechanisms for producing such outcomes."

The foregoing conceptualization of strategy as practice differs drastically from previous research in strategy theory with the primary difference being that strategy-as-practice scholars use a "practice lens" to understand and define strategy. For example, strategy is premised on the notion that it is an activity that is socially accomplished, resulting in a focus on the practitioners who engage in these socially

accomplished activities. Whittington (2006) also suggests that strategy should be viewed through a "lens" based on social and practice theories. He suggested this change in the ontological and epistemological assumptions that theoretically underpin the study of strategy within the strategy-as-practice programme and allows scholars to focus on what may have been previously considered "mundane" aspects of strategy management. The practice lens offers the strategy-as-practice research programme insights into the mechanisms used and strategy processes followed as well as the influence these have on the outcomes. This shift in perspective also implies a change in the definition of "strategy".

A widely accepted definition of strategy among strategy-as-practice scholars is that strategy is a "situated, socially accomplished activity, while strategizing comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity" (Jarzabkowski, Balogun and Seidl, 2007, pp. 7–8). This definition is important both in identifying what strategy is for strategy-as-practice scholars and includes the characteristics that underpin the assumptions they make regarding how they conceptualize their theoretical and empirical assumptions of strategy within this research programme. As such, this is the definition operationalized in this study because it conceptualizes strategy as an activity engaged in by human actors, and also because it is "socially accomplished" in multiparty interactions between people through various modes. Furthermore, this definition of strategy suggests that strategy is "situated", which implies that all such strategic work takes place in a particular location (virtual or *in situ*) and at a particular time (making it episodic). These facets suggest a multimodal characteristic of strategy, i.e. one which may include talk (or discursive resources), interactions (embodied resources), location, and tools (material resources), which they "draw upon" in the accomplishment of this work. It offers a view of strategy practices consisting of structure and agency in an entangled manner (Orlikoswki and Scott, 2008).

Accordingly, strategy-as-practice scholars have aligned their work with three major paradigm shifts, or "turns" as they are often referred to in social theory. The first is referred to as the "*discursive turn*", which focuses on the role played by discourse and narrative in building strategic subjectivity, as described by authors such as Balogun et al. (2006), Dameron and Torset (2014), and Czarniawska (2014).

The second is referred to as the "*practice turn*", which, according to Jarzabkowski (2005, 2006), Mantere (2005), and Whittington (2006), focuses on micro-activities practised by strategists in their everyday practice of strategy, underpinned by theorists such as de Certeau (1984), Giddens (1984), Reckwitz (2002), and Schatzki (2001). In this regard, strategy-as-practice theory has emerged as one of the primary theoretical bases for conceptualizing the role of action, thus enabling a change in how strategy is perceived, researched, and defined (Jarzabkowski and Kaplan, 2010).

The third and most recent turn, the "*material turn*", primarily looks at the types of materials used by strategists as communicative tools and as enablers for strategy formulation and implementation. This turn has allowed scholars to explore how, for example, technology, Microsoft's PowerPoint® software (Kaplan, 2011), whiteboards, and Lego® bricks (Heracleous and Jacobs, 2008) have informed the strategy-formulation process.

In summary, each of the explained turns has led to scholars exploring the resources used within it. The discursive turn has led to scholars examining the use of language in meetings, text, and documents to better understand how discourse influences and shapes strategy. The practice turn has led to scholars focusing on the interactions, micro-activities, and practices engaged in during strategizing. Consequently, this study aims to integrate the turns and offer a generic approach to understand the multimodal nature of strategy workshops. This is because, by their nature, strategy workshops are conducted through the synthesis of discursive, material, and embodied resources. Although scholars have isolated these constructs for analytical purposes, *in situ*, they "coexist, co-evolve, can be mutually generative and can create concurrent impact" (Dameron et al., 2015: S2).

Toward developing a better understanding of the role played by discursive, material, and embodied resources within strategy as practice, I will review each construct in turn. I will do so by outlining the disciplinary and theoretical origins of each construct, summarizing the key empirical findings presented by scholars within strategy as practice for each construct. Finally, I will analyse the importance of each construct in

the context of strategy meetings. This contextual review starts with the discursive resource, followed by the material, and concludes with the analysis of embodiment.

2.3 Meetings as Sites of Practice

Meetings are a sophisticated interactional activity with multiple layers. Social actors engaged in meetings usually apply multiple resources to achieve strategic goals of the meeting and researchers usually analyse meetings through many perspectives. Meetings are a form of social activity that concerns two or more people engaged in institutions, organizations, or professions (Schwarzman, 1989). More generally, the term "meeting" is used by social actors and researchers to refer to "heterogeneous gatherings in which people meet for professional and institutional purposes and work together on a common task and goal" (Angouri and Mondada, 2018, p. 468). Previously, organization studies were limited in the perceived importance of meetings. This is because meetings were primarily seen as being simply necessary for the accomplishment of decision-making (Simon, 1997). However, this has since changed for scholars and practitioners alike. Meetings are now considered to be an essential and routine aspect of organizational life (Seidl and Hendry, 2003). Scholars from various disciplines have drawn empirical data collected from meetings in different contexts across relatively small to medium and large firms within single case studies, to studies that span multinational companies (Angouri and Mondada, 2018). Strategy-as-practice scholars have treated meetings as an exceptional practice within strategy research, making them interesting research sites.

Meetings represent an interesting context for studying strategy as practice for a plethora of reasons. Firstly, meetings offer researchers a contained interactional site of practice that has "observable characteristics", which define the norms, practices, and behaviours that constitute strategic work and shape strategic outcomes. Given these qualities, the study of meetings has developed gradually over the years. One particular genre of meetings that has received increased research attention is strategy workshops, which are also known as workshops. Strategy workshops are of particular interest due to their prolonged duration, as this allows researchers to examine the patterns of interactions found in different organizations and the different types of issues discussed within them (Seidl and Guérard, 2015).

Secondly, meetings allow scholars to study different institutional bodies, because meetings are relevant in diverse workplace environments, particularly in the context of established teams as they happen more often. Meetings also have a set of practices adhered to by those who attend them. They offer contexts in which insightful data can be gathered on personal relationships and the interactional histories between institutional roles and the histories of the people who hold these roles. Those who attend meetings tend to have a shared view of what they are meant to accomplish together and a set of behaviours they follow in how they participate within them. Most importantly, meetings are multimodal sites of practice, allowing a micro-analytical perspective to "what" things people do and "how" they do them. This then enables scholars to develop a theory for "how" and "why" these elements inform the strategic work conducted during the meetings. For purposes of this study, I will provide a review of literature on meetings as a strategic practice with particular focus on business/ corporate workshops or strategy retreats.

Accordingly, I focus on four areas of study that represent key characteristics of meetings and the theoretical themes that underpin this research. Firstly, I begin by presenting the overarching characteristics of meetings based on existing literature. Secondly, I focus on two genres of strategy meetings, i.e. internal meetings (meetings that take place at the primary location in which the daily running of the firm takes place), and external meetings or strategy workshops (meetings that take place away from the office), focusing on what strategy-as-practice scholars have contributed to what we know about the value of strategy workshops. Thirdly, I review literature that has analytical sensitivities to the three constituent resources of meetings (discursive, material, and embodied) and how previous scholars have conducted research on how mobilizing these resources shape the process of strategizing. Again, the focus will be on how a particular resource offers a different understanding of the meeting and the role that meetings play in how each resource contributes to shaping the strategic outcomes. Finally, I present how the anticipated contributions regarding what we know and understand about meetings and thereafter present my research question. However, a detailed definition of meetings is a prerequisite as provided below.

2.3.1 Defining Meetings

There are two widely used definitions of meetings across the social sciences (Angouri and Mondada, 2018; Seidl and Guérard, 2015). The first was provided by Deirdre Boden and the second by Helen Schwartzman. Both scholars have written extensively about meetings.

According to Boden (1994, p. 84), a formal meeting may be described as:

> "… a planned gathering, whether internal or external to an organization, in which the participants have some perceived (if not guaranteed) role, have some forewarning (either long-standing or quite improvisational) of the event, which has itself some purpose or 'reason,' a time, place, and, in some general sense, an organizational function."

Schwartzman (1989, p. 3) presents a slightly different definition of meetings, referring to them as:

> "… a communicative event involving three or more people who agreed to assemble for a purpose ostensibly related to the functioning of an organization or group … to make a decision or negotiate an agreement … A meeting is characterized by multiparty talk that is episodic in nature, and participants either develop or use specific convention for regulating this talk. Participants assume that this talk in some way relates to the ostensible purpose of the meeting and the meeting form frames the behaviour that occurs within it as concerning the 'business' of the group or organization."

Although these summations of the characteristics of meetings differ slightly, both present features that seem critical in defining meetings as an organizational phenomenon that is primarily communicative in nature, may have multimodal characteristics, and is convened as a shared participatory event. Seidl and Guérard (2015, p. 565) skilfully drew on these two descriptions of meetings and listed the following defining characteristics of a meeting and how they help distinguish strategy

meetings from other social events. They break down the two definitions and offer the following key characteristics of meetings:

1. *Planned:* meetings usually have a predetermined time and place to which participants are invited. Participants are bracketed (Boden, 1994) away from other daily routines in order to attend them.
2. *Episodic:* this characteristic implies that meetings have a determined start and finish time.
3. *Discursive:* meetings are understood to involve some form of talk. This may include talk-in-action, which implies the use of material and interactions and may include text and non-verbal forms of communication.
4. *Gathering:* this can be virtual or face to face and should have a minimum of two participants. In the case of strategy-as-practice meetings, a site should be provided in which the relationship between organizational issues and the practices of strategists may be studied.
5. *Co-location and temporary (re)location:* this is pre-supposed for a meeting to take place; participants agree on a central location where they will gather. This separation from the rest of the organization allows for a sense of critical reflection on the organization away from daily operations.
6. *Purpose:* the meeting has a purpose for the group or organizations usually determined prior to the meeting in the form of an agenda or a list of talking points around which participants will orientate themselves.

Combining these characteristics, Seidl and Guérard (2015, p. 565) defined the practice of meetings as follows:

> "A planned and episodic communicative event that involves several participants co-located in the same (physical or virtual) space and whose purpose is ostensibly related to the functioning of the organisational group."

Although this definition helps distinguish meetings from other social gatherings, it is broad and allows scholars to explore the role of meetings from different perspectives. One characteristic emphasized in all the definitions of a meeting is its temporariness.

It takes place at a specific time and has a structure to it that is usually facilitated through various tools such as an agenda (Angouri and Marra, 2010).

Following a review of the literature about meetings, Seidl and Hendry (2003) developed a systematic framework for the study of strategy meetings as episodes. They defined an episode as a process or sequence of events that has a beginning and a predefined end: "The basic function of episodes is simply to make it possible to suspend and replace structures for a certain time period" (Hendry and Seidl, 2003, p. 183). Meetings are thus considered as practices that are episodic as they have a beginning and an end and are temporally delimited in design. Based on these assumptions, the authors suggested that meetings can be studied in three phases to help researchers develop a systematic approach to the study of meetings as a strategic practice. Their framework consists of three phases (initiation, conduct, and termination) conceptualized as the three aspects of a meeting in the context of strategic stability and change (Seidl and Hendry, 2003). The authors suggested that breaking the episode into these three aspects may help strategy-as-practice scholars identify micro evolutionary activities embedded within the overall episode. It may also offer insights into how smaller mechanisms that make up a meeting shape the strategizing process in different ways depending on the stage at which the meeting is at. In the following sub-section, I present each of the three aspects of an episode and the "structuring characteristics" identified by Jarzabkowski and Seidl (2008, p. 1391) across 51 meetings in different universities using the systematic approach to analysing meetings as developed by Hendry and Seidl (2003).

2.3.2 Strategy Meetings as Episodes: A Framework for Studying Meetings

Meetings may be framed as an activity taking place within the organization but outside of the standard structure of the organization. First, the meeting is de-coupled from the rest of the organization, this is known as the initiation aspect of the episode. The initiation aspect of a meeting refers to how the meeting is set up as something separate from the ongoing processes of the organization (Hendry and Seidl, 2003). In the case of strategy-focused meetings, the suspension of operational topics and practices enables those participating in the meeting to focus on strategic issues. Informed by Boden's (1994) concept of "bracketing", Hendry and Seidl (2003) suggested that the

initiation phase of a meeting enables participants to "bracket in" issues of strategic importance and value while choosing to "bracket out" issues deemed to be strategically insignificant. The "bracketing" also applies to the participants, as individual members of the organization may be included in strategic meetings while others are excluded. This inclusion and exclusion of actors into the process of strategizing has an effect on how strategic issues are shaped, and on the outcomes of the strategizing process. Examples include board meetings (Liu, 2013; Liu and Maitlis, 2015) (including board members and intentionally excluding operative members of the organization), middle managers' meetings (Mantere, 2005, 2008), and committee meetings (Hoon, 2007). These selections suggest that one's level of seniority may be linked to one's inclusion or exclusion in the meeting.

Initiation also considers how meetings enable participants to temporarily "de-couple" themselves from the structures of the organization as a whole. This is exemplified by how senior management teams may break away from their daily routines and physically go away from the usual workplace to attend a strategy workshop to focus on strategy-related issues (Seidl and Guérard, 2015). This is important as it is this act of de-coupling from the organization's daily routines that allows the opportunity for reflexive practice, expedited decision-making, and strategic orientation, fostered by strategic episodes. As stated by Hendry and Seidl (2003, p. 188):

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

These strategic results must then be fed into the organization and contribute to its wider strategy. Hendy and Seidl (2003) suggested that the termination phase of the meeting can serve as the appropriate aspect of the meeting during which the connections between the episode and the wider organizations can be made.

Termination refers to how meetings are brought to an end. This can be based on the time allocated to the meeting or the participants meeting the goals and objectives of the meeting. An important aspect of the termination phase lies in how the issues discussed in the meeting are integrated into the rest of the organization. In relation to good ways to ending meetings that lead to the most effective results once the participants return to the organization, Jarzabkowski and Seidl (2008, p. 1410) identified four common termination practices across the sample of 51 meetings observed in a university context. The first was the creation of working groups as a subset of the participants attending the meeting, which would be responsible for the implementation of specific action points identified during the meetings. The second was the practice of rescheduling items in the agenda so they could be discussed at future meetings. The third was the act of voting, which adheres to democratic decision-making in meetings as a way of reaching consensus among participants when a resolution cannot be easily reached through discussions alone. The last practice was stage-managing re-coupling. This practice considers how organizational audiences may respond to the strategy. Each of these practices has implications related to stabilizing and destabilizing the strategic outcomes of the meetings, and all take place toward the end of the meeting as a way to conclude the meeting and re-couple participants with the organization.

In summary, Hendry and Seidl (2003) developed a framework suggesting that there are different aspects embedded within episodes that could offer insights into how strategy meetings are conducted. Also, Jarzabkowski and Seidl (2008) applied the proposed framework and found variations in the micro-mechanisms of meetings based on the three aspect of a meeting. As such, the initiation aspect enables scholars and practitioners to identify and systematically study practices that may lead to a better understanding and appreciation of the strategies used by social actors. These social actors are further enabled to identify the practices that allow them to de-couple and re-couple the practice of meetings through micro-level interactions among participants.

Another aspect of an episode identified by Hendry and Seidl (2003) is the "*conduct*" aspect, which refers to specific ways in which participants interact during the discussion phase of a meeting. This aspect has been the focus of numerous scholars in the study of meetings as episodes, especially the role played by the person chairing

the meeting and the type of discussions they enable or hinder due to how they conduct this phase of the meeting (Kwon, Clarke and Wodak, 2012; Wodak, Clark and Kwon, 2011). Some scholars have compared the role of the chairperson in a meeting to that of a switchboard (Boden, 1994; Asmuss and Svennevig, 2009) to facilitate how participants take turns, while also being responsible for the progression of the topics.

What studies of strategy meetings have shown is that the role of the chair may at times lead to "interactional asymmetries" (Wodak, Kwon and Clark, 2011, p. 595) in certain conversations due to the "chairperson's preferences" (Asmuss and Svennevig, 2009, p. 16). Jarzabkowski and Seidl (2008) identified four meeting discussion practices based on the authority held by the chair in the conduct aspect of strategy meetings i.e.: free discussion (when the chair suspends his/ her authority, allowing participants to discuss issues in an unstructured manner); restricted free discussion (limits the issues open for discussion to strategic themes, but allows for self-organized discussions among the participants); restricted discussion (follows structured turn taking with each participant being invited to speak on a matter related to the agenda); and administrative discussion (a form of discussion that deals with the reconciliation of existing and newly formed strategic items such as progress reports on capital expenditure) (Jarzabkowski and Seidl, 2008, p. 1409).

Thus, the foregoing sub-section of the literature review shows that there are three perspectives from which strategy-as-practice scholars have studied meetings. The systematic analysis of strategic episodes through the framework developed by Hendry and Seidl (2003) has made a significant contribution to how meetings have been systematically analysed by strategy-as-practice scholars. It has enabled scholars to see the micro-evolutionary practices found in strategic episodes, which may have been otherwise missed if a meeting was seen as one homogenous event as opposed to three aspects of an episode that performs different functions within the meeting (Hendry and Seidl, 2003; Jarzabkowski and Seidl, 2008). I adopt this framework in the present study as it enables me to analyse meetings as episodes, allowing me to develop a narrower approach to the comparative analysis of the embedded practices within a meeting by looking at the activities of the meeting through the tri-part lens of episodes developed by Hendry and Seidl (2003).

In the next sub-section, I review the literature on strategy meetings through a discursive lens. To further locate this current study, the remainder of section 2.3 provides an overview of the three constructs within meetings as delimited for this study, i.e. discourse, materiality, and embodiment. I review each construct by defining the construct, presenting the insights already made by strategy-as-practice scholars, and detailing the assumptions inherent in the study of the construct. This is followed by examples of studies that have focused on the same construct in the context of meetings. I conclude each sub-section, for each of the constructs, by identifying areas in which the current study aims to make theoretical contributions related to strategy workshops.

2.3.3 Discursive Lens

The aim of most strategy-as-practice studies focusing on meetings is to recognize the practices used during meetings and their effects on strategy (Jarzabkowski and Seidl, 2008). In its formative years, strategy-as-practice studies examined numerous discursive practices to gain a better understanding of how conversation among participants enables or hinders meetings (Laine and Vaara, 2015). Discursive practices are the patterns of saying and the linguistic and discursive devices that people use to talk with each other in meetings (Seidl and Guérard, 2015). The prevalence of talk in meetings has led to discursive practices being the most commonly studied form of resource within meetings (Seidl and Guérard, 2015; Mantere 2005, 2008). This is mostly informed by the conventional view of the role of meetings that offer social actors the opportunity to talk about issues of importance and make decisions (Angouri and Marra, 2010). An important insight made by strategy-as-practice scholars regarding the use of discursive practices is that different members of an organization use and appreciate different discursive practices according to the institutional role they hold and the importance they place on different strategy-related issues.

Mantere (2005, 2008) conducted two studies that differentiated between institutional roles. In the first study Mantere (2005) found that middle managers felt more enabled by adaptive discursive practices, as they were expected to engage in problem solving, strategizing, sense-making, and conforming to strict strategic targets. Findings were contradictory, however, for social actors in operative roles within the organization

who were bracketed out of the strategizing process between the upper manager and middle managers, and bracketed into different meetings between middle managers and those in operative roles. They felt that their agency was fostered by discursive practices, which made the strategy more concrete.

Mantere (2008) later explored how discursive practices differ with regards to Floyd and Wooldridge's (1992) institutional role expectations. Thus, Mantere identified three discursive practices that middle managers believed created enabling conditions when practised by upper management. These are the narration of the strategy to middle managers by upper management (narration), receiving assistance to place them in context (contextualization) and making reference to resources available to middle managers (resource allocation) (2008:302). Both studies offer insights into how the difference in one's institutional role may lead to different categories of discursive practices and how different discursive practices can encourage a different level of agency within the organization. Mantere seems to suggest that there is a difference between the discursive practices used based on the level of seniority held by the person engaged in the discursive practice. Both these studies were based on interviews and offer insights into participants' perceptions of the various discursive practices identified, as well as offering an opportunity to examine how these discourses emerge *in situ* (Mantere, 2005, 2008).

2.3.3.1 Discursive Practices within Meetings

Clark, Kwon, and Wodak (2011) conducted a series of studies focusing only on strategy meetings. In their first study the authors examined the role of the chairperson in these meetings, focusing on the discursive practices used by the chair to encourage or hinder strategic consensus. Following a micro-level analysis of the conversations between the chair and the participants, they found that the discursive practices used by the managing director (who also chaired the strategy workshops) shaped strategic consensus. They identified five discursive patterns during the internal and external (away from the usual workplace) strategy meetings, i.e. bonding, encouraging, directing, (re)committing, and modulating (Clark, Kwon, and Wodak, 2011, pp. 603–606).

Bonding refers to the use of pronouns such as “we” instead of “I” during the meeting as a discursive practice that helps to build consensus. Encouraging consists of stimulating the participation of other social actors within the meeting through the use of questions, requesting expert advice, supporting existing propositions via repetition, and positive feedback. This discursive practice leads to the exploration and development of new strategic ideas. Directing can be viewed as the opposite of encouraging. Unlike encouraging, the chairperson brings discussion towards closure and resolution by reducing ideas through interruptions, being critical of ideas raised, and by interrogating propositions of others via closed questions. (Re)committing is the discursive practice of nudging participants toward a commitment to action. It can be seen when the chairperson requests participants to commit to an action in relation to a decision that has been made. This discursive practice encourages actors to take ownership of putting the plan into action after the meeting. Finally, modulating is a strategy used by the CEO to influence the perception of the participants, which is commonly done through augmentative appeals to common knowledge. Clark, Kwon and Wodak (2011) suggested that chairpersons with an egalitarian style of leadership can achieve consensus in strategic meetings through a balanced use and application of these five discursive practices.

In their second study, Kwon, Clarke and Wodak (2014) applied a micro-analytic lens to investigate how teams develop a collective view on strategic issues in meetings, focusing on the participants in the meeting as opposed to the individual chairing the meeting. Kwon, Clarke and Wodak (2014) identified five micro-level discursive strategies that seem to play an integral role in enabling participants’ development of a collective view on strategic issues (equalizing, (re)defining, simplifying, legitimating, and reconciling). Equalizing “involves actors encouraging participation by relaxing protocols and power structures to provide the space for other participants to come forward and express additional viewpoints” (Kwon, Clarke and Wodak, 2014, p. 283). An example they found was that when the managing director of the organization suspended his/ her level of authority during the meeting, he/ she temporarily enabled the meeting to include more relaxed discussions, which led to participants talking in a more informal and relaxed manner. Their analysis of the data suggests that this was achieved by the managing director using humour, irony, and even sarcasm as linguistic tools when introducing serious topics or discussing difficult issues with the

participants. It seems the managing director's increased level of friendliness helped the participants to engage more honestly and saved face during challenging conversations. Also, by replacing expert terminology with colloquial language, participants were able to engage with each other informally. Notably, both these studies (Kwon, Clarke and Wodak, 2014; Wodak, Clark and Kwon, 2011) were based on data collected at strategy workshops where social actors are usually encouraged to suspend the formal nature of the organizational structure of the office and temporally engage in a less formal manner (Seidl and Guérard, 2015). These studies seem to have a common theme, which is that there is a difference in the discursive practice used by social actors according to their institutional role and status in the meeting. Where they differ is in the type of discursive practices engaged in as well as in the level of formality and linguistic choices according to the context in which the discursive practices are used.

Kwon, Clarke and Wodak's (2014) second micro-level discursive practice is (re)defining, which leads to the actors in the meetings presenting new information that can lead to the development of new ideas. This is achieved through participants being encouraged by the managing director to present differing perspectives on issues, which leads to the refinement. The third practice, legitimating, involves members attempting to establish control by justifying their underlying assumptions, which leads to an increase in the credibility of a particular viewpoint on an issue. The fourth of their discursive strategies is reconciling, which is to disassociate participants from the position in the company to minimize differences between them. Finally, simplifying is a discursive practice that helps the social actors reduce complexity in meetings, which leads to more straightforward ways of defining the terms used during the meeting, which, in turn, narrows understanding and makes the issue one that participants can feel at an emotional and visceral level. In this study, the authors proposed a simultaneous focus on context, power, and language as the "scaffolding" for an objective analysis of a meeting.

The said study offers an exciting view on participation and enlightens us regarding certain underlying aspects of meetings, which are not directly referenced in the article but can help us have a better understanding of how the embodiment of participation takes place. For example, Kwon, Clarke and Wodak (2014) make reference to the

presence of hierarchy in the meetings and the effect that the chairperson's behaviour has on how relaxed or formal the rest of the participants are. The authors acknowledge that this was outside of the scope of the study, and also that the method they used did not allow for them to revisit these fleeting moments as they used an ethnographical approach, which is macro-analytical in nature, to identify micro-level discursive strategies in meetings.

However, there is the suggested presence of the human body, or its absence, in the analysis or explanation of how the authors arrived at their conclusion. This suggests that there were performed behaviours enacted by the manager that changed how the audience reacted based on the use of humour and a change in the language. This also suggests that there was a performative element to the meeting (for example, the embodied aspect of telling a joke, and possibly displayed indicators of people being more relaxed), which shaped the content and context of the meeting. The current study aims to explore how the different participants were encouraged to participate or hindered from participating through a moment-to-moment analysis of the embodied influence enacted by the facilitator of the strategy workshop and the most senior member of the team, how this was received, and how it was negotiated by the participants *in situ*.

Hoon (2007) conducted a study focused on how interactions between senior and middle managers in informal settings later influenced the outcome of formal committee meetings. Hoon (2007) described informal strategic conversations as those that take place outside of formal meeting settings These informal strategic conversations included emails, telephone conversations, and informally organized one-on-one behind-the-scenes conversations. The author found that these informal conversations allowed middle managers to gather information of strategic importance and negotiate new strategic ideas with senior managers outside of the formal meeting. These ideas could then be raised in the formal meeting, knowing that they would be endorsed by a senior manager. The ability to have strategic conversations with senior managers prior to the meetings lead to strategic alliances based on informal prearrangements between participants.

Hoon (2007) also found that these informal strategic conversations had a positive impact on the formal meetings, as they gave middle managers agency and an angle from which to negotiate their participation in the formal meetings. Focusing both on formal and informal discursive practices allowed Hoon (2007) to uncover and examine diverse strategizing activity patterns among aggregate actors within the organization and different approaches to gathering strategic input, negotiating activities, and influential decision-making activities. Similarly, the current study aims to examine how strategic conversations that happen "behind the scenes" (between managers in the same level and across middle, senior, and operative managers at strategy workshops) may influence the strategic outcome of the meeting. Hoon (2007) also mentioned a variety of modes of communication used by the participants to communicate, which suggests the presence of material resources. As opposed to having these in the background, the current study places these material resources in the foreground to study how and why these artefacts are used, and to what end they enable or hinder participants' ability to negotiate their participation in the meetings.

In another study, Clarke, Kwon and Wodak (2012) demonstrated how discursive practices in strategic meetings serve as the site at which the larger context of the meeting is established. Their findings suggest that strategic meetings are "influenced not only by the logic of argumentation and discursive skills of the participants" (Clarke, Kwon and Wodak, 2012, p. 470) but also by the materials that form the physical setting of the meeting (for example, the location of the meeting, the settings within the room, or the different hierarchical positions of the participants). Using a discourse-historical approach (DHA), the authors found that taking the historical and wider socio-political factors of the organization into consideration affected the strategic outcomes of the strategy workshop (Clarke, Kwon and Wodak, 2012).

The authors' study contributes to what we know about the effect that the materials, location, and different positions held within an organization may have on strategic outcomes of a meeting. The authors applied DHA as their analytical approach, which led to a better appreciation of the historical context in which the meeting was located and how previous conversations had contributed to the meetings. It also offers an opportunity for further exploration regarding the direct moment-by-moment analysis of the perceived difference between those in middle and senior management. The

authors relied on archived material, interviews, and observation of the meetings. However, the use of video and audio recordings may also enable one to identify the resources in use and how different participants apply them to the meeting to achieve the strategic outcome, as was the case in the current study.

Again, Clarke, Kwon and Wodak's (2012) study shows that the distinction between the resources used in meetings cannot be isolated *in situ*, but represents an apparatus used by researchers to define the boundaries of their particular topic of interest. Therefore, in this study, I commit to communication being an embodied process (Mirivel and Tracy, 2005) enabled by discursive and bodily resources within the material context in which it unfolds. Clarke, Kwon, and Wodak's (2012) study shows that discursive and material resources in meetings have an interwoven relationship that, when analysed together, leads to greater appreciation of the interplay and roles played by discursive and material resources in meetings. In the next section, I explore this overlap and present the insights gained by strategy-as-practice scholars in the examination of material resources in strategy meetings.

2.3.4 Material Lens

Dameron, Lê and LeBaron (2015: S5) elaborated that "… materiality lies at the heart of strategy work". Material aspects of strategy work include (but are not limited to) how strategy tools and frameworks are used by strategists to inform and shape the work they do. Scholars who have studied the use of materials within the strategy as practice approach have analysed how tools such as PowerPoints (Kaplan, 2011), the framing role of artefacts such as 2 x 2 Matrices (Jarzabkowski et al., 2013a) and how tools developed in the 1980's, such as the SWOT analysis are used *in situ* to help orientate strategists in their strategy making process. Indeed, "the practice of strategy is concerned with the way that the social and material aspects such as tools, locations, and spatial arrangements configure strategic interactions between bodies and things" (Balogun, et al. 2014, p. 185).

In a similar vein, Grand et al. (2004, p. 72) asserted that "materials used in strategy work are an expression of the multiple ways of packing and sharing strategy concepts and practices". Materials are a challenging resource to study within meetings due to

how intimately entwined they are with the practices engaged in by practitioners (Dameron et al., 2015). There is, however, alignment in the view that they do play a significant role in shaping the strategic outcomes. Similarly, "the practice of strategy is concerned with the way that socio-material arrangements configure strategic interactions between bodies and things" (Balogun et al., 2014, p. 185). Strategy-as-practice scholars have only recently begun examining the effect that materials have and to investigate their efficacy and affordances. Dameron et al. (2015) provided strategy-as-practice scholars with five analytic categories of materials used in strategy work (more about this below), from which it is clear that these materials may shape or invite, and at the same time be constrained to a set of specific uses in the practices and activities engaged in during meetings.

2.3.4.1. Material Practices within Meetings

Material resources are ever-present in meetings and yet little is known about what it is they contribute to strategy as a practice. Orlikowski (2007, p. 1436) suggested that "every organizational practice is always bound in materiality. Materiality is not an incidental or intermittent aspect of organizational like, it is integral to it". This current study aligns with this view in that meetings exemplify both an organizational practice and are contexts in which a multitude of practices and materials are simultaneously employed. For Schatzki (2011), the idea of practices and materials are closely entangled. Schatzki (2011, p. 11) defined a practice as an "embodied materially mediated arrays of human activity centrally organized around shared practical understanding". This definition suggests an entanglement in the "doing" of a practice, which involves both "beings" and "things". Little is known, however, about the effect that these materials have on the strategic outcomes of meetings.

The conceptualization of materiality I adopt in this thesis is one that suggests that there is an entanglement between the social and the material. This view of materiality draws on a relational view to suggest that the social and the material are entangled and inseparable (Orlikowski and Scott, 2008). Scholars view materiality as a performance rather than a substance (Callon,1998; Orlikowski, 2007). Accordingly, Dameron, Lê and LeBaron (2015: S6) asserted that, from this perspective of materiality, "all materials are thus necessarily social and cannot be understood in the absence of

context, this view rejects the idea that social and material are distinct and separable". From this perspective, materials and practices are intimately entwined.

Lê and Spee (2015) suggested two broad definitions of materiality based on the *Oxford English Dictionary*. The first is that materiality may refer to mere physicality, meaning that "material is something that exists separately from the mind; it is an object with physical properties that occupies space" (Lê and Spee, 2015, p. 583). The second definition is that materiality may refer to the quality of being relevant or significant, i.e. "material is something that is inseparable from the mind; it is the object of our attention and may or may not have distinct physical properties but rather, gains meaning on the basis of the characteristics we ascribe to it" (Lê and Spee, 2015, pp. 583–584). Both definitions are drawn upon in organization studies and can be useful for strategy-as-practice scholars seeking to work with materiality. However, the second definition is the one most relevant to the ontological and epistemological views of the current study and thus the definition applied when referring to materiality.

Additionally, Dameron et al. (2015: S2) identified five categories of material resources used in strategy work i.e. strategy tools, objects and artefacts, technologies, built spaces and human bodies. Each of these categories presents avenues for research on the materiality of strategy. In the next section, I review the studies conducted that focus on each of these materials and what they have contributed to what we know about the contributions made by the different materials to meetings. Dameron et al. (2015) emphasized that these different types of materials are not mutually exclusive but rather co-exist, co-evolve, can be mutually generative, and can create concurrent impact. An important aspect of face-to-face meetings is that they allow those in attendance to communicate, exchange ideas, and make decisions of strategic significance to the organization. Owing to their importance in meetings, in relation to strategy as practice, the first of the five categories reviewed below comprises the strategy tools used by strategists to inform and shape the strategic outcome of meetings.

Accordingly, Dameron et al. (2015) explained that strategy tools enable the expression of the multiple ways of packing and sharing strategy concepts and practices in organizations. They transform strategy concepts into ideas and discursive patterns that take the form of discernible modes of communication and thus become reference

points that can be used by managers and researchers who may be drawn to investigate the phenomena. Often, the primary goal is to share the strategy with a view to guiding and communicating the organization's long-term direction. It is important that the content and message of the strategy are preserved as it is communicated and cascaded within the organization. This point, at which discursive practices and the material resources used by those engaged in meetings, is one of the first examples that show how different resources are entangled and intertwined in meetings. Czarniawska (2014, p. 111) suggested that "in order for an idea – a thought, an image – to start travelling, it must become an object". To enable the movement of these ideas, it is essential for the ideas (abstract and made known through discursive resources) to materialize (be made concrete). Therefore, once concrete, members within an organization can do strategic work (Dameron et al., 2015) then strategic collaboration can begin (Hodgkinson and Wright, 2002) and strategy sense-making can be achieved (Mantere, 2005). An example of this relationship between the discursive and material resources can be seen in a study conducted by Jarzabkowski and Spee (2015), who explored how the discursive practices used in a meeting informed the text later developed as a material in the form of a document used to encapsulate the strategic ideas generated from the discursive practice.

Aptly, the second category of materiality is the objects and artefacts that are used as forms of mediation. They are not inherently meaningful but instead are made meaningful through social interaction (Dameron et al., 2015). Heracleous and Jacobs (2008) examined the emergence and evolution of ideas during a strategy workshop involving Lego® bricks. The use of these artefacts showed that they afforded a different form of sense-making about organizational identity and strategy. Similarly, Hindmarsh and Pilnick (2007) presented "material" as an essential aspect of knowledge production. The primary focus of the authors' study was on the casual mapping tool and how it was used to produce knowledge about strategic issues. However, this study differed from that of Paroutis et al. (2015) in the material selected. Paroutis et al. (2015) foregrounded the human body as the primary enabler of the production of knowledge. Such an approach pointed to how the informal and formal tacit practices that underpin the production of teamwork can demonstrate how the body offers team members practical knowledge of the dynamic role of interacting bodies in the same locale. Therefore, strategy tools and techniques can act as enablers

with the ability to help managers make decisions about the strategic direction of the organization.

Regarding the third category of materiality, i.e. technologies, there are strategy technologies such as Microsoft's PowerPoint® software (Kaplan, 2011), which is used as a conveyancer of information during the formulation and revision of strategy. Dameron et al. (2015) highlighted that this previously insignificant tool in strategy research is now the most dominant presentation software and is commonly used in strategy meetings as it helps in facilitating the work being done by strategists. For example, Paroutis, Franco and Papadopilis (2015) investigated how a top management team discernibly interacted with a causal mapping tool to produce knowledge about strategic issues in a single workshop and explored the agency of strategy makers and how they interacted with each other. The importance to the study lay not just in the discursive nature of the meeting, but also in the observable interactions among the workshop participants, which formed part of the analysis and sense-making. Related to this, their findings revealed three distinct patterns of observable interactions (shift, inertia, and assembly) and showed how the benefits of the tool used enabled each of these behaviour patterns. The cited study thus contributes to the understanding of material–body connections with a particular emphasis on the implications of tool-triggered and actor-triggered interactions, and how these embodied interactions aid the production of strategic knowledge (Paroutis et al., 2015). Paroutis et al. (2015) also examined the explored strategy tools used, or rather misused, during the interactions. I will discuss in the present study how this affects participants in relation to their oscillating between a formal and informal interactions and the embodied interactions within this space, as they reveal emergent enablers and hindrances to the strategizing process.

Built spaces, i.e. the fourth category of materiality, are the venues or places in which meetings usually take place. These can also be regarded as forms of material. From boardrooms within the organization or away-day retreats hosted off-site, the space in which strategic work takes place is an enabler or an inhibitor to the work done by strategists. Within the space, there is also furniture, decor, light, and colours, which impact how those who are present in the space function within it. For example, LeBaron and Streeck (1997) focused on built spaces within the context of

organizations' offerings, suggesting that human interaction and communication involve space in multiple ways on account of the spatial and interactional order used to conduct a police interrogation. Through the use of ethnomethodology, these authors carried out a careful analysis of the embodied interaction between the participants and their surroundings. The authors use the spatial relationship between detectives and a suspect as units of analysis to build a case for space as an essential resource during interrogation. While the context in which this interrogation takes place is not one that falls within typical organizational meetings, the aim and object of the interrogation is one that does have a strategic focal point of prominence, which is to ascertain if the suspect was responsible for the crime. This study exemplifies how space and its materiality offers insights into what the body does and how the body is bound and influenced by its surroundings. It examines how "the physical structure of the interrogation room is differentially appropriated, used, and filled in by the participants" (LeBaron and Streeck, 1997, p. 1) territorial and postural manoeuvres over the course of their interaction. This study helps build an appreciation for the role played by bodies within a confined space. Also, how the spatial structures thus created by the bodily appropriation of the physical locale are subsequently formulated by talk and thereby used as a metaphorical resource to frame the participants' "situated experience" (LeBaron and Streeck, 1997, p. 1).

The final category, i.e. the human body is also regarded as one of the materials in that it may be foregrounded for analytical purposes. The present study is most aligned with this category as the first point of analysis of the ongoing work in meetings stemmed from what people were doing in relation to the other materials discussed above. This may be seen in the components of the research question as already presented in earlier sections of this thesis. Vaara and Whittington (2012, p. 316) underscore the significance of the human body and suggested that future research should "go beyond discourse to consider how the material, in the form of both bodies and artefacts, is used to accomplish strategy work" and this was a major instigator for the chosen area in which this study aims to make a theoretical contribution.

As the editors of a special issue related to the subject under discussion, Dameron et al. (2015: S6) noted the ambiguity in defining materiality, referring to it an "elusive concept" that can be viewed from three perspectives. The first perspective primarily

focuses on objects and how their qualities impact behaviour. This perspective defines materiality as a "mere physicality", and researchers adopting this perspective tend to adopt a positivistic approach, seeking a cause-and-effect relationship between the material and the strategic outcome. The second view considers both the object and the subject (social actor) engaged with the object. For scholars adopting this perspective, there is a relationship between objects and the social, but while they are mutually dependent, they are distinct and separable building blocks (Leonardi, 2011). The third perspective draws on a relational view to suggest that the social and the material are entangled and inseparable (Orlikowski and Scott, 2008). This is a view I discuss in greater detail later (in section 2.3.7) and the subsection below argues on how the body is viewed through the embodied lens.

2.3.5 Embodied Lens

Dale (2000) argued that the human body can be conceptualized in three ways: biological body (the body is viewed primarily as an anatomical organism), historical body (the body is recognized as being constructed differently over time through social and cultural forces), and phenomenologically lived body (the body is experienced in our everyday lives as the medium through which we "know" our world). These conceptualizations are intertwined, yet the notion of embodiment sets apart the body-as-organism from the historical and the phenomenological body. In this regard, Dale (2000, p. 11) asserted that "embodiment emphasises the 'lived body' but not simply in the sense of presenting the body as the subject who knows the world through human perception in opposition to the body as an object of scientific knowledge. Rather embodiment rejects the Cartesian dualistic separation of subject and object" (Dale, 2000, p. 11). We can derive from this assertion that it is the lived-in body that is seen in the world and experienced through embodied conducts, embodied interactions, and through the situated embodied practices. In this way, the body may be observed as both mind and body, subject and object, shifting through the liminality of being a bearer of tacit knowledge, a creator of knowledge, and a communicator of knowledge through embodied interactions.

Ashcraft et al. (2009, p. 33) explained the fundamental role of the body in interactions by stating that "communication is an embodied act" and that "bodies literally 'take

shape' at least in part, through communication". Essentially, human bodies communicate, which in turn shapes bodies. Furthermore, Dale's (2000) theory of embodiment seems to resonate with Ashcraft et al.'s (2009, p. 34) redefinition of communication, as the "ongoing, situated, and embodied process whereby human and non-human agencies interpenetrate ideation and materiality toward meanings that are tangible and axial to organisational existence and organizing phenomena". In this regard, Ashcraft et al.'s (2009) redefinition, together with Dale's (2000) theory of embodiment underpin this study's premise that the human body embodies critical mediating functions during organizational strategy formation processes. Hence, attempts to bring the human body into scholars' exploration of sociality, work, and organizations underscore the need to focus on embodiment (Hindmarsh and Pilnick, 2007; LeBaron, 2016; Wright, 2017).

The human body then does not conduct work in a vacuum, and it is essential that one acknowledges the context in which it is situated to appreciate better what it does. Liu and Maitlis (2014) asserted that the human body belongs both to the world of words and things, the verbal and nonverbal, discursive and practical, the physical and the nontangible dichotomies. These dimensions notably include gestures, gaze, facial expressions, emotions, and proxemics as an example that described the role of the spatial and bodily aspects of strategic work (Jarzabkowski, Spee and Burke, 2015),

The combination of a "people-focussed programme" that foregrounds actions and practices and a micro-level of analysis make it vital to enquire about the role of embodiment. Central to this is that the people doing the strategizing *in situ*, require consideration of the embodiment and materiality that shape social interactions/ encounters among actors engaged in strategy making. To that end, Dameron, Lê and LeBaron (2015) advocated the acknowledgement of the body as more than just a mental object or locus of emotions, regarding what the physical body can contribute to the practice of strategy as a burgeoning area of knowledge.

As argued above, strategy-as-practice scholars are now beginning to view the human body as an essential contributor to the practice of strategy. The extent to which the socio-materiality is prevalent in strategy-as-practice scholarship offers an opportunity for further studies on the multimodal role the human body may or may not have

through embodied interactions with other bodies, tools, and artefacts. The spatial and bodily activities responsible for accomplishing strategy necessitate the study of the various categories of material semiotics together. The reviewed studies have explored the role or the presence of the body in strategy-as-practice studies and have provided varied pointers that there is more to the body than meets the eye. However, none of the cited studies have interlaced discursive, material, and embodied interactions as the focal point of their studies in the context of strategy workshops, and this is the theoretical contribution I make through this thesis. Therefore, this focus on the micro-level of analysis makes it crucial to examine the role of embodiment in shaping social interactions/ encounters among strategy practitioners as discussed below.

2.3.5.1 Embodiment within Meetings

Liu and Maitlis (2014) explored the multiple emotional dynamics generated by multiple team members in longer episodes of strategizing about various strategic issues present within meetings. Through their study, they identified five kinds of emotional dynamics that influence strategizing processes by shaping the team's relationship. The study makes a meaningful contribution to the literature pertaining to emotions in strategy-as-practice as they focused on embodied cognition. The limitation though is that the study did not consider the strategist and his/ her holistic context. It is possible that the emotions presented during the strategizing were due to the personalities of the team members and relational histories, rather than due to the strategic issues. This study was influential in my analysis of the data as it offered me a lens through which I was able to identify and analyse humour and laughter as an emotion that arises in the practice of strategy and explore how humour and power are related in strategic work.

Additionally, Jarzabkowski et al. (2015) found that the body could be regarded as a tool that constructs spaces in a financial trading context and thus could be considered an essential part of strategy work. Observations were made through video-data with a particular focus on how speech, material objects, and embodied behaviours informed strategy-as-practice. The conclusion was that the participants shifted the orientation of their bodies in co-ordination with discourse and artefacts to engage in three forms of strategic work, i.e. private work, collaborative work, and negotiated work. The study

thus presented different types of strategic work that involved the body and how the intertwining of the body and space informs strategy as practice. Due to the study being confined to Lloyds Bank's trading floor and between two actors, the researchers were unable to explore how the body may interact with more common artefacts and tools used in the formulation and implementation of the strategy (Jarzabkowski et al., 2015). The authors acknowledged this as a limitation and strongly suggested that future studies explore the role of the bodily, discursive, and material resources employed in the more common strategic workshops. By extension, this call includes meetings that may take place in boardrooms and offices and how the materials found in these contexts offer the participants objects and artefacts that influence the strategic outcomes. As such, the current study answers to this scholarly call through this thesis and extends on the work done by the cited authors in the context of strategy workshops.

Similarly, Liu and Maitlis (2014) and Jarzabkowski and Spee (2015) asserted that strategy-development processes can use discourse, artefacts, and the body to their advantage in strategy work. Zammuto et al. (2007, p. 752) contended that the materiality of built spaces shapes the activity of the body in as much as it can also be a constrainer. This study adopts ontologically (which I discuss in Chapter 3) a socio-material review of the body and the manner in which there is an entanglement between body, objects, and artefacts within the space where the meetings take place.

Consequently, viewing strategy meetings through a multimodal lens allows the use of symbolic interactionism as the epistemology of the study (I discuss this in greater detail in Chapter 3). As Streeck, Goodwin and LeBaron (2011) explained, a multimodal lens entails taking both discourse and embodiment into consideration and examining the interplay of bodily orientations, gestures, gazes, material, artefacts, and talk. In this thesis I employ this lens in investigating the agency of the human body as the non-verbal communicator through enactment and behaviour during the strategy development processes. My main focus is on how accumulative practices, constituted by also combining surrounding factors that are then mutually accentuated, enable or hinder participation in the strategy-as-practice processes. This is done through focusing on the micro-evolutionary practices found in strategy workshops.

2.4 Conclusion

In the literature review, I have established the boundaries of the literature within which this study intends to contribute. The primary audience for the study and the theoretical foundations of the study are within the strategy-as-practice research programme. The study aims to contribute to what we know about three resources used within strategy workshops. The materials reviewed in the literature as resources found in the meetings as the site of practice are strategy tools, built spaces, objects, and artefacts. Unlike prior studies conducted by strategy-as-practice scholars, this study does not consider the body to be a material but rather an interlocutor that co-exists and co-evolves with the materials present in meetings. Paying closer attention to the entanglement of the performative body, and how it engages with the materials in the development of strategy, can enhance our understanding of the practices that contribute to the development of strategic work. The focus of the present study is on embodiment, together with the materials used in strategy workshops as a socially accomplished strategy practice.

The strategy field has long considered the impact of discursive, material, and embodied resources separately. The gap that this study aims to fill is how these resources (discursive, material, and embodied) are entangled in practitioners' involvement and engagement within the context in which their meetings take place. Hence, I use a dramaturgical lens to enable me to account for the objects and artefacts as the props used by the participants and their actions; I use the space to enable me to examine the context in which the meetings take place as a site for a performance; and how the entanglement of these resources together with the embodied interactions displayed by the participants enable me to see how the space, objects, and artefacts are enablers and/ or hindrances to the "performance" of away strategy workshops as well as the effect that these have in shaping the away strategy meetings.

I derive several insights from the theoretical perspectives presented above pertaining to discourse, materiality, and embodiment. First, previous research on strategy has mostly prioritized discursive aspects of strategy-making over its material aspects. As a result, materiality, which has five dimensions (strategy tools, objects and artefacts,

technologies, built spaces, and human bodies; Dameron et al., 2015), has been under-theorized. As Grand et al. (2004) emphasized, materials are individuals' expressive and/ or communication means during strategy processes, hence, they are crucial to understanding strategy. One sub-category of materiality is the body, but the literature does not explore how the materials comprise the embodied interactions. I have differentiated between the body as an organism and the phenomenological body that is socially constructed, drawing on the concept of embodiment. This perspective helps me explore strategizing *in situ* and understand how materiality and embodiment shape the evolution of the strategizing process during this organizational practice. The strategy-as-practice approach and dramaturgy can enrich our understanding of both because it incorporates the non-verbal components into the analysis of strategy. The discursive, material, and bodily activities responsible for accomplishing strategic work, or the various categories of material and semiotics present in the strategic work, could offer clues in the role played by the embodiment in the formation of strategy. The few studies that have explored the presence of the body in strategy as practice have provided signs that much can be gained from reviewing strategic work through the simultaneous analysis of the discursive, material, and embodied focus. However, few scholars have made this the focal point of their studies and this is the theoretical contribution I intend to make through this thesis. Thus, the research questions I pose is:

> *How are embodied, material, and discursive resources mobilized to enable/ hinder strategic participation?*

In this thesis, I adopt a dramaturgical-analysis approach (Goffman, 1969) in order to build theory on the micro-actions, which allows me to explore the material and embodied dimensions while also considering the role of discourse in strategy. In researching the interplay between discursive and non-verbal communication, I draw on all three bodies of knowledge presented above in a way that reveals the interlacing of these three dimensions, which is a unique contribution to the literature. I discuss the chosen methodology in Chapter 3.

CHAPTER 3: RESEARCH METHOD

3.1 Introduction

The purpose of this chapter is to explain the methodological approach and tools employed to conduct this study. It takes an inductive, qualitative research approach to data collection and analysis. The chapter is structured as follows. In section 3.2, I introduce the theoretical underpinnings of the thesis. These include a constructivist ontology and a symbolic interactionist epistemology. This is followed by an introduction to FinCo as my research site and the primary reasons that informed my selection of the firm as a case study in sections 3.3. and 3.4. These sections also provide justification for the use of a single case study (Yin, 2009) to make the proposed theoretical contribution, given the research gap outlined in the previous chapter. This is followed by a summary of the methods used in the collection of data in section 3.5, in which I explain the use of participant observation, which includes the use of field notes and audio-video recording. Section 3.6 details the data analysis, including an overview of Erving Goffman's (1959) dramaturgical analysis, with a particular focus on his impression management theory, which I use to help me interpret the practices identified within the meetings and their meaning. I conclude the chapter with the ethical consideration of the study and issues of reflexivity in section 3.7 and a summary in section 3.8.

3.2 Philosophical Underpinning

3.2.1 Constructivist Ontology

Berger and Luchmann (1996, p. 15) suggested that "only a few are concerned with the theoretical interpretation of the world, but everybody lives in a world of some sort". The view that one takes on the world or the nature of the world has implications on the research questions asked, research tools used, and how these research questions are answered (Brayman and Bell, 2011; Suddaby, 2006). Ontology, as referenced above, is concerned with the nature of reality and the "very essence of the phenomena under investigation" (Burrell and Morgan, 1979, p. 1). Regarding the development of

the theoretical approach to this study, a constructivist stance suggests that the most effective notion of practice is in its framing and orientating of research. Working towards the development of the theoretical approach to the study of strategy as a practice, Orlikowski (2015, pp. 23-30) suggested that the most effective notion of practice is in its framing and orientating of research. To this end, practice as a *philosophy* entails the commitment to an ontology that posits practice as constitutive of all social reality, including organizational reality.

To this end, a constructivist ontology posits reality as constitutive of all social reality, including organizational reality. Tsoukas (1998, p. 792) suggested that a practice philosophy is one in which "the models through which we view the world are not mere mirrors upon which the world is passively reflected but, in an important sense, our models also help *constitute* [original italics] the world we experience". From this perspective, the conjunction of practices and material resources constituting practices is seen as being performative as they produce realities (Law and Urrry, 2004, p. 395). Consequently, in this study, the practice ontology entails the study of the constitutive practices that strategists engage with, what the elements are that constitute those practices, and how these are achieved in a range of sociomaterial activities.

3.2.2 Symbolic Interactionist Epistemology

My engagement of a constructivist practice ontology was supported in this study by my engagement of symbolic interactionism as a complementary epistemological position. Symbolic interactionism was originally conceptualized by George Herbert Mead (1943) and later developed by Herbert Blumer (1969). Symbolic interactionism is a "sociological and social-psychological perspective grounded in the study of the meanings that people learn and assign to the objects and actions that surround their everyday experiences" (Williams, 2008, p. 850). From this perspective, people and the "things" that surround them in their "doings" are equally important to understanding the symbolic meaning attached to such actions and things. Theoretically, the focus of the perspective is on society, especially a micro-level engagement with the interactions between individuals and the symbols they use during interactions (Blumer, 1969; Prasad, 2018; William, 2008).

Blumer suggested that in such an approach, there is no single *true* reality but multiple ones. Individuals within society create and decipher these realities through the interpretation of the symbols and interactions they encounter. From the imagery of symbolic interactionism, members of society engage through a "dynamic web of communication. Thus, society *is* interaction. And, interaction is symbolic because, through their interactions, people assign meaning to things" (Trevino, Daft and Lengel, 1990, p. 73).

This echoes the term itself in that "symbolic interactionism" consists of two concepts: symbol; and interaction. Symbol refers to the social objects used during interactions. These may include gestures, a word, or physical objects that stand in place of or represent something else. Under symbolic interactionism therefore, "objects, and events have no intrinsic meaning apart from those assigned to them by individuals in the course of everyday social interaction" (Prasad, 2018, p. 19). The second word in the term is interaction. Interaction highlights "the importance of interpersonal communication in transmitting the meaning of symbols. Through interactions, culture arises" (Williams, 2008, p. 849). Interactionists recognize culture to be the beliefs, objects, and practices that collectively create everyday life. Simultaneously, symbolic interactionists acknowledge that people are autonomous interpretative beings, who have the ability to negotiate, alter, and reject the meanings they learn as they are "active creators of symbols and culture" (Williams, 2008:849). One's view of this reality may change over time through interactions. Similarly, the meanings of the symbols, materials, and messages experienced by those engaged in the interaction are subject to change. People are thus "formed, sustained, weakened, and transformed in their interactions with one another" (Blumer, 1969, p. 21) as they meet at different encounters and positions.

Such key premises are effectively set out by Mead (1943) for symbolic interactionism. First, human beings act towards objects based on the meaning they attribute to these. From this point of view, no symbol has inherent meaning; instead, meaning is assigned. Second, the meanings people learn and later attribute to such objects arise out of social interactions. This may be done through social interaction with others, through various forms of face-to-face interactions or via mediated interactions such as via the internet, film, social media, or music (Williams, 2008). Third, the meanings

are not permanent, but are constantly modified through interactions and are handled through an interpretative process used by a people differently in specific situations. Pfeffer (1981) thus noted that every aspect of organizational life is symbolic. However, these organizational phenomena only come to life in and through interpretations of rituals, company policies, and management style, as members evoke different responses in an ongoing process.

The significance of this view to the current study is that it offers a lens through which to interpret the object, artefacts and embodied interactions among participants at away strategy workshops as practices that not only evidence ongoing action, but are also symbolic of the meaning collectively created among the participants in a socially accomplished manner. This suggests that the symbols used during away strategy meetings themselves do not have meaning. They are instead subject to gaining meaning through how different participants engage. Thus, symbols used may acquire different meanings throughout the meeting. This opens room for a detailed investigation of the different ways in which participants engage with these symbols, how this leads to different meanings and interpretations influencing further action, and therefore how these symbols help us understand about the strategizing process.

3.3 Research Design: Case Study

An overview of research design is provided in Figure 3.1.

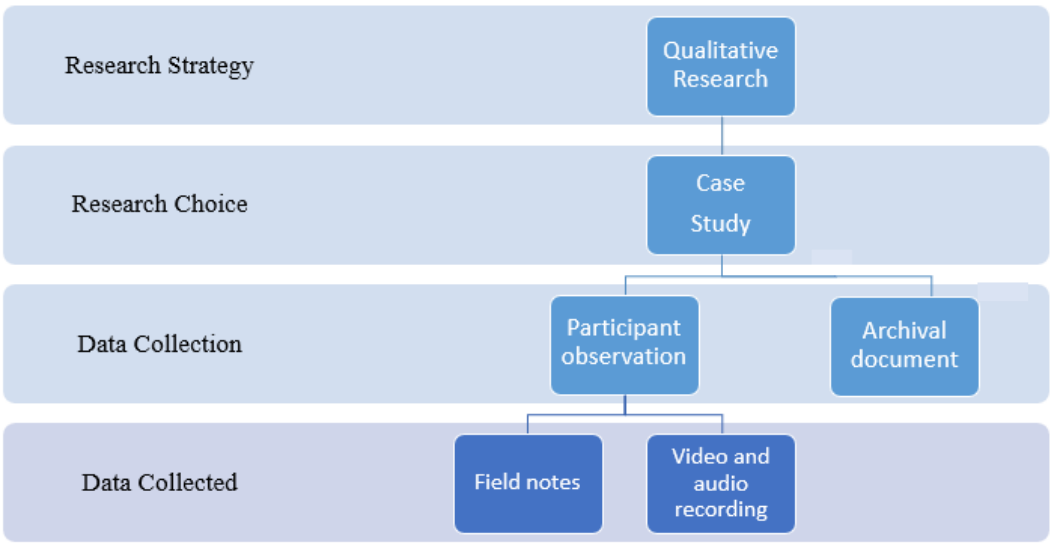

Figure 3.1. Overview of the research design.

As discussed in the literature, strategizing consists of multifaceted, dynamic, human interactions (Johnson et al., 2007). However, the discursive, embodied and materially mediated interactions at its centre are often fleeting (LeBaron, 2012). In order to understand the relationship between the multimodal resources used in meetings and the strategy processes engaged in by senior team managers, I employed an inductive, qualitative research approach, using a single case to help address the research question (Stake, 1995; Yin 2009). A case study approach was selected as it enabled me to research the phenomenon of interest in its natural setting (Yin, 1994, 2003, 2009), which is critical given the emphasis on the situated nature of strategizing in the strategy-as-practice literature. The use of case study in qualitative research is considered suitable to answer how and why questions in instances where the research cannot control or impose a desired outcome (Yin, 2014). It is also a method that can help capture human activities and offer insights to complicated social processes (Eisenhardt and Graebner, 2007), which strategizing undoubtedly is. Finally, as Yin (2014) maintained, a case study design offers a rare opportunity for increased transparency of the analysis of data. It is, therefore, well suited for inductive theory building as it requires a research to build theory from multiple sources of data (Eisenhardt and Graebner, 2007), thus being also appreciative of the complexity of situated patterns and activities as they emerge.

To be able to study the phenomena of interest in a natural setting, I set out to find an organization that met five key criteria for the study.

First, the organization had to be engaging in strategy-focused activities that would allow me to literally and directly (Johnson et al., 2007) observe the activities and interactions that contribute to the work strategists do.

Second, the organization had to have a relatively inclusive strategy process so as to allow me to observe the different dynamics that emerged in the process of strategizing among organizational team members.

Third, it was important to analyse an organization that would allow for me to audio-video record their meetings, as the potential value and contribution of the study hinged

in the use of video as an under-utilized method in the strategy-as-practice community, thus offering ample opportunity for rich contribution.

Fourth, the organization needed to be large so I could examine different departments within the organization and be able to compare, contrast, and better understand how the practice of strategy workshops in particular unfolded. Being able to do this across different levels within the organization and over a series of meetings was key to understanding the strategizing process within the organization (Jarzabkowski, 2005, 2008; Liu, 2013; Whittington, 1996).

Finally, the organization had to have members who were willing to be intimately observed *in situ*, as the study required me to gain access to strategists' micro-behaviours, which interviews alone would not capture. This is, in part, recognition of the fact that much qualitative strategy-as-practice research has previously relied on interviews as the chief data-collection method (Mantere, 2005, 2008), which meant that the "stuff" (Johnson et al., 2007, p. 68) that strategy practices is made of, such as negotiations of meaning in a distinct time and place, could not be comprehensively captured. The above-mentioned criteria were set out and communicated to potential research sites for the study and of the three possible organizations: FinCo (a bank in South Africa) met all the necessary criterion.

3.4 Background to the Industry

In the following section, I present an overview of the banking sector and offer a description of the case study company and the strategy process they were undergoing during the time of the study. This is followed by a summary of the overall strategy journey the firm was undertaking, the role played by the strategy management office, the strategy meetings included in the study, as well as a summary of the participants in the study. At the end of the section, I explain why this organization was best suited to address the research gap outlined in the previous chapter, and provide a description of the specific episodes chosen for analysis and presentation of the data in this thesis.

3.4.1 The Banking Sector in South Africa

South Africa has a well-developed financial sector and compares well with other BRICS (Brazil, Russia, India, China and South Africa) countries, which represent five emerging major national economies. The South African financial system is efficient in channelling capital to investment and its banks dominate the banking landscape in Africa. That said, the banking industry in South Africa is highly regulated (Singlton and Verhoef, 2010). Developing a strategy within the sector must first adhere to the regulations stipulated by the South African Reserve Bank (SARB), Financial Sector Conduct Authority (FSCA), the National Credit Regulator (NCR) and the National Treasury, among others. This means that over and above any bank strategy being innovative and competitive, it must remain within the legal policy frameworks of the regulatory authorities.

The four largest banks account for 80% of total bank assets. Competition among banks, as well as innovative financial products such as those provided by State Owned Entities, Fintech, and Bitcoin, have meant that banks have had to become agile, quick to respond, and highly competitive in their strategy to maintain a sizable market share. As a result, South African banks are lauded as proactive in adopting and internalizing best practices to ensure that they are strategically aligned both with global and local trends emergent in the sector (Okeahlam, 2005). The banking sector also plays a major role in the stability of South Africa's economy and in the lives of those they serve. The strategies developed must, therefore, be customer-centric, innovative, and responsive, while also being legally sound and meeting the regulatory requirements to avoid losing their banking licenses. Strategy in these conditions requires a complex and dynamic effort.

3.4.2 The Case Study: FinCo

The organization where the study took place is a bank in South Africa, an important aspect of note in that although I am based in the United Kingdom (UK), I am a young African woman born and bred in South Africa (SA). It was due to geographical link to SA that I had an interest the bank located in Africa. FinCo is a pseudonym used to protect the anonymity of the firm. FinCo was established over 120 years ago and it

has headquarters in Johannesburg, with many satellite offices and branches across the country.

Prior to choosing FinCo as the research site, I contacted six different organizations (three strategy consulting firms and three financial institutions) and I chose the firms due to the high volume of strategy-focused interventions for clients within financial services. The three organizations were selected following a conversation with colleagues and friends who worked in companies undergoing strategic change. Subsequently, between April and May 2016, I spent eight weeks in South Africa conducting a multi-sited ethnography (Nicolini, 2012), interviewing the six prospective participants (one senior strategy practitioner from each organization) and spending one to seven days job-shadowing them. The aim of this pilot study was to develop relationships with strategists from potential research sites. The pilot study exposed me to different strategy approaches to strategizing in the organizations and gave me the opportunity to develop a protocol to the data collection tools. I gained an appreciation of "a day in the life" of a strategist and was able to see which organization would be best suited for the research question (Van Maneen, 1984).

Three of these participants agreed to have me conduct my study at their firms and I chose FinCo for three main reasons. First, I chose the banking sector (in which FinCo operates) not only because it is a dynamic context in which to study how strategy is formulated, but also because it is a context in which the application of impression management theory (Goffman, 1959) is particularly pertinent. As one FinCo interviewee put it:

"We are having to calibrate ourselves into the type of bank our customers can trust and go on the journey with the customer. When you work in this business you must be honourable. We are bankers, we are dealing with people's money. People must believe that we will behave in an honourable way at work and in society. I only hire credible, qualified, and legally vetted staff … people have an impression of you from the get-go. How you write, present yourself, and interact with others, these things are very important … the team knows I will send back work if it's not up to scratch. I lose a lot of time, but they get the point; we must make a good impression and represent this department well." (Interviewee 8)

This interviewee's department is well-known for written documentation as it develops policies for the bank. Each word they write may have implications for how the policy is later interpreted. As such, ensuring that what is written or said during engagement is both correct and of a high professional standard is a key feature of their work.

The second reason was that FinCo was about to partake in a series of strategy retreats as it had recently launched a new strategy and was about to undergo a three-month-long cycle of strategy meetings. These strategy meetings would comprise three levels of the organization: the executive committee level; the cluster level; and the departmental level. This meant I had a total of 24 strategy meetings I could attend, all of which I was given permission to observe and video record. In section 3.4.3, I present a summary of these meetings and provide a detailed description of the away strategy workshop used in this thesis.

With regards to the third reason I felt that FinCo best suited this study was that they were intentionally focusing on making their approach to strategizing inclusive, participatory, and engaging. As will be discussed in section 3.4.3, FinCo's strategy-management team had conducted an internal strategy-management diagnostic, which revealed seven critical areas the firm needed to improve. These specifically included an increase in participation from departments. This meant I could conduct a comparative analysis of how different managerial levels negotiated their participation in the meetings, as one key feature of analysis my literature review revealed as likely highly relevant. The improvements also referenced the importance of the design aspect of these strategy sessions, suggesting that they be "energizing and engaging". This lent itself to a performative aspect to the strategy process as another key analytical aspect of interest. In particular, the strategy-management office team designed a strategy protocol that was identical in structure and content across all the strategy meetings, with the only difference being the strategy they were reviewing. This meant that I could compare the meetings, identify patterns of interactions, and distinguish the differences in the outcomes of the strategy based on how the participants engaged. I adhered to the contract I signed with FinCo's legal team and adhered to the guidelines presented in the ethical conduct expected within business research (Bryman and Bell, 2011). In order to address these three issues, I took the following steps.

I provided the gatekeepers at FinCo a detailed research proposal outlining the nature of the then proposed study. Following approval from the executive committee, I was asked to follow the "onboarding protocol" to which all their employees were subjected. I went through a vetting process in which I had to provide my own and my partner's financial records, three months' bank statements, authenticated proof of identity and address, as well as photos and fingerprints. The organization then did a background check on my credit score and criminal record. After securing clearance, I was given a contract by the legal department, which permitted me to collect data at FinCo. I obtained informed consent from each participant at the start of each strategy meeting. The consent form included a detailed outline of my research, the nature of the research, and their right to voluntary participation, along with their right to withdraw at any time during the research process (see Appendix A for sample consent forms). In addition, I met with the heads of all departments and presented at their 2016 annual conference to build a rapport with potential participants, explaining the nature of the research and giving those in attendance the opportunity to ask me any questions about the study.

3.4.3 The Strategic Process at FinCo

FinCo is an exceptional case-study setting for the study of micro-practices in strategy making as it started a three-stage strategy change process in 2015. The process started in January 2015, when Tshepho [pseudonym] was appointed as the new CEO. Tshepo had worked at FinCo for several years before his appointment and, upon taking the reins, he [together with his Executive Committee (ExCom)] set out to develop a new strategy for the firm that would enable cross-functional teams to work together and a more bottom-up approach in the strategy-formulation process. Prior to this decision, strategy had not been a central function within the organization. The new approach comprised the development of a new strategy framework as well as cross-departmental strategic objectives. The new approach to working across departments and subsidiaries within FinCo meant teams that had not worked together prior to the development of the strategy were now required to work together for the first time. The change in the organization's emphasis on the importance of having a unifying strategy also meant focusing both attention and resources on the act of collocating participants from across the organization so they could engage in strategic activity.

In June 2015, ExCom approved the "seven-step strategy management framework" for strategy development and implementation. To improve the strategy process at the firm, the Strategy Management Office (SMO) facilitated an internal strategy-management diagnostic between June and July 2015. The following seven themes emerged regarding the improvement needed to the firm's strategy-management environment:

1. align the strategy framework to the financial year of the firm, underpinned by a stronger framework;
2. shorten the formulation cycle and focus on execution;
3. create a more inclusive formulation process (top-down with significant bottom-up input);
4. increase the external input into the strategy-formulation process;
5. design strategy-formulation sessions to be more engaging and energizing;
6. create alignment between the firm, cluster, and departments; and
7. improve accountability and how the firm measures and tracks strategy.

All the above-mentioned themes were adopted and helped inform the design of the strategy-formulation process. These themes were identified prior to my arrival at the bank and were highlighted to me when I met FinCo representatives in the early stages of my study. These themes highlighted what was important to FinCo and made the organization even more theoretically aligned with the aims and objectives of the current research (the interest in how participation could be fostered within the organization) for three reasons.

First, the firm's efforts to enable inclusivity across the bank (as suggested in the third theme), meant that the SMO, together with the senior management team, included a larger number of middle and operational managers from cross-functional teams, such as human resources, were also included in the meetings and encouraged to participate. For example, on arrival at the strategy meetings, those of lower managerial ranking were encouraged to speak freely and openly by their respective heads of department (HODs). This will be discussed in greater detail in Chapter 4.

Second, to address the fifth theme from the diagnostic report, all the strategy meetings were hosted in luxury hotels and away from the office to allow for participants to

engage in a relaxed environment away from their offices. The spaces used for the actual workshops were set up in a uniform manner (at each hotel) and the strategy protocol (the running sheet for the sessions) used to facilitate the sessions were the same at ExCom, cluster, and departmental levels. This standard approach was used by all facilitators across the organization, systematizing how different members of the organization experienced the workshops and enabling me to develop an analysis protocol that followed a chronological order (Patton, 1990), with similar patterns, as each meeting followed the same structure.

Finally, the strategy sessions were designed at times to allow for the ExCom, cluster, and department strategy sessions to be in close succession to ensure that the strategy-formulation process was cascaded across the departments. Furthermore, these seven themes were gradually distilled and informed the development of the strategy-management cycle and framework, leading to a more integrated strategy-management process, driven by the SMO, with an intense focus on integration and execution.

As mentioned earlier, the process was led by the Strategy Management Office (SMO), which is the team I was part of for the duration of the study. I joined FinCo in August 2016, a month before the leadership conference and presented the findings of my "Time and Motion Study"[2]. I began collecting video data in SA from October 2016 at the start of the strategy-formulation process, which took place at the cluster and department level. I left for the UK and began my preliminary data analysis in December 2016. I returned to SA to video record the meeting held at FinCo's headquarters in March 2017 and recorded the "subprocess 1 strategy sessions", which were quarterly strategy-review sessions held across the organization. I collected data between the months of March and April 2017. Figure 3.2 depicts FinCo's new strategy-management cycle and new strategy-management framework.

[2] This will be discussed in greater detail later in this chapter when I summarize how I gained access to the research site.

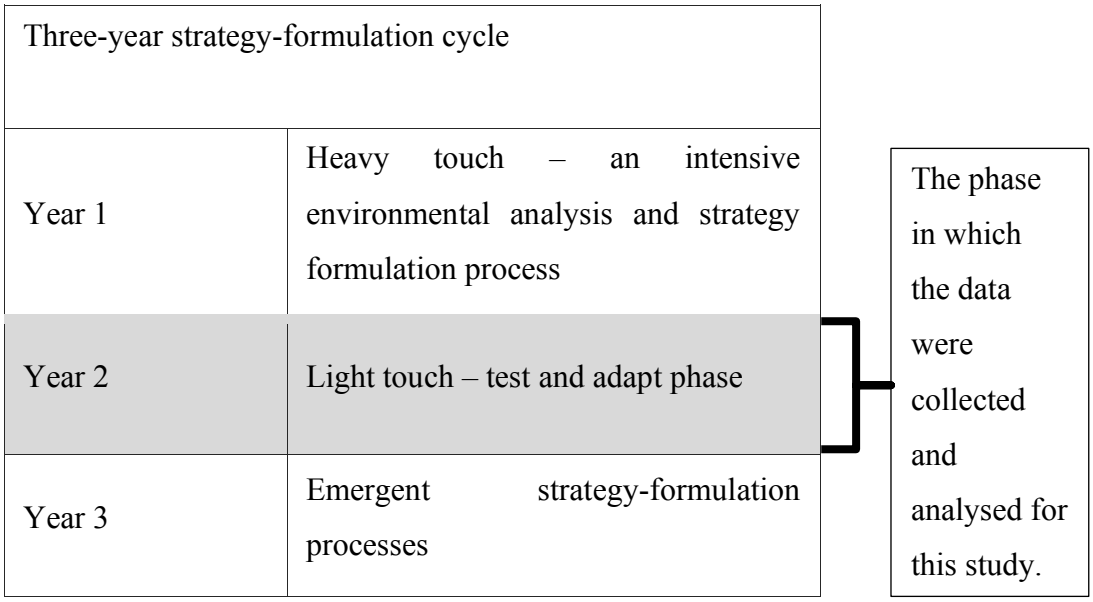

Figure 3.2. FinCo's new strategy-management cycle and new strategy-management framework.

The development of the new strategy framework was closely followed by the adoption of the resulting strategy-and-performance-management cycle at the ExCom meeting in August 2015. A new strategy cycle, which began in September 2015, was launched and implemented from April 2016 onwards. The strategy process consisted of three phases: heavy touch, light touch; and emergent strategy-formulation processes. The SMO team's definitions of these three phases are explained in the following sub-sections.

3.4.3.1 Heavy Touch

The "heavy touch" planned strategy formulation process was approved to take place once every five years or when there were major triggers in the environment that could impact the firm's purpose, strategic focus areas (SFAs), or strategic objectives. I was not present during the organization's "heavy touch" formulation process. I was, however, given a copy of the strategy developed during this phase; I also interviewed ExCom and members of the management, and had the strategic process and outcomes explained to me by members of the SMO team.

In summary, the "heavy touch" strategy-formulation process was conducted in September 2015. This process followed a top-down approach to strategy formulation. The process consisted of an intensive environmental analysis and a full formulation of the strategy at the firm level, translated and cascaded to the cluster and department levels. This translation and cascading was followed by an alignment process to ensure there was consistency vertically between the overall strategy of the firm, clusters, and departments, and horizontally between clusters, core departments, and support departments. The process was concluded with a statement of strategy and finalization of the strategic plans for the firm, clusters and departments. For the strategy periods between 2015 and 2018, the strategy framework allowed for two strategy processes to manage environmental analysis and strategy formulation referred to as the "light touch"; and "emergent strategy-formulation processes" as further explained in subsequent subsections below. The data for this study were collected during the "light touch" phase of the strategy-formulation process. Unlike the heavy touch, the light-touch approach followed a top-down and bottom-up approach to strategy formulation, with the strategy-formulation process including senior, middle, and operational managers from across the firm.

3.4.3.2 Light Touch

The "light touch" phase (also knowns as the "test and adapt" phase) followed an annual structured approach but, unlike the "heavy touch" process, the steps were less intensive and followed a review approach rather than a reformulation of the strategy.

The "light touch" included steps 1 and 2 of the new strategy-management framework, as illustrated below in Figure 3.3. It ran for four consecutive years within each five-year strategy horizon. This strategy process was similar to the "heavy touch" process in terms of the steps followed but was less intensive. The process consisted of a *rapid* environmental analysis and a *review* of the strategy at the firm level, *refined* through the cluster level to the department level. The final step was an alignment process to ensure consistency vertically between the firm, clusters, and departments, and horizontally between clusters, core departments, and support departments.

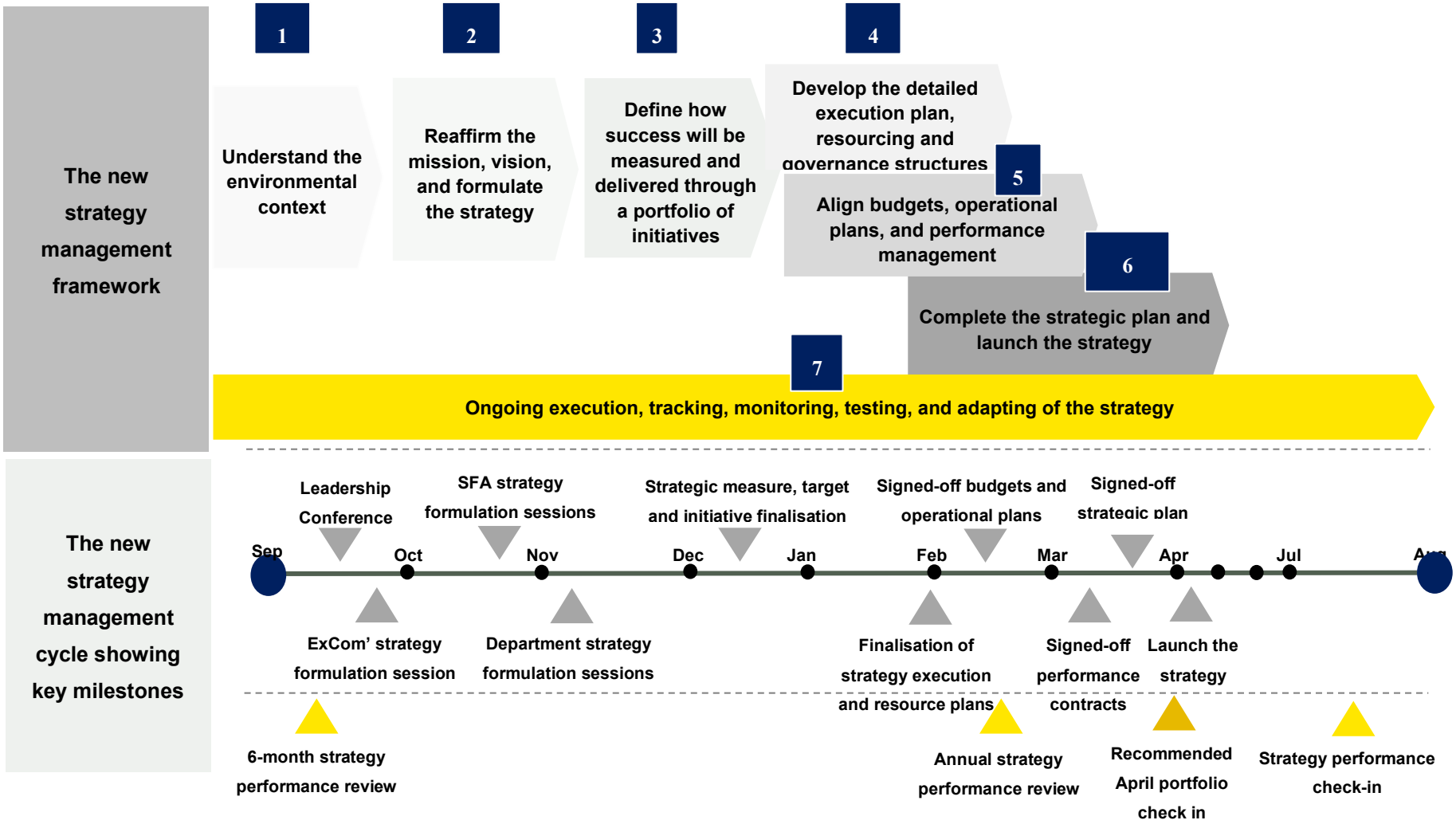

Figure 3.3. The new strategy-management framework.

The key design principles of the "light touch" phase (see Figure 3.4) were:

- Rapid environmental analysis conducted predominantly internally.
- Aligning the leadership on strategic performance through a one-day team-building and alignment breakaway session. This was not planned as a full leadership conference as in process 1 because this session was planned to be issue-led.
- Reviewing and refining the firm strategy through strategy mapping, strategic dashboards (measures and targets) and identification of a portfolio of initiatives. This was planned to be completed in a one-day session.
- Translating and cascading the strategy using the same formulation process for the clusters and departments. The plan was for each cluster to run a three-day session, within which both clusters and departments would complete their strategy. Day 1 would be cluster focused; on day 2, each department would formulate their own strategy; and on day 3, all departments would report back and ensure vertical alignment with the clusters and horizontal alignment across departments.
- Aligning strategy processes across FinCo, clusters, and departments.
- Refining the statement of strategy for the firm, clusters, and departments as well as finalizing the strategic plans.

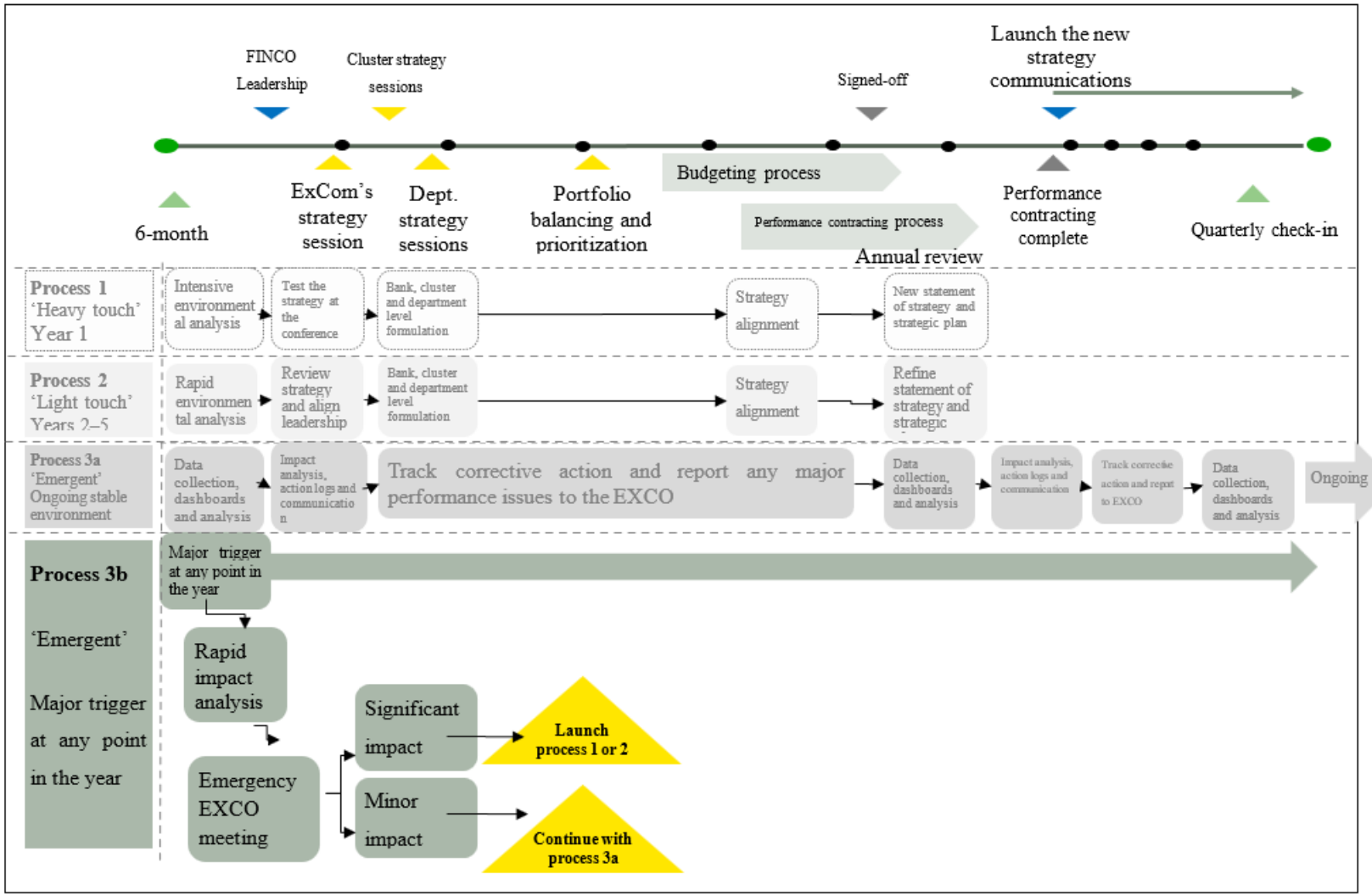

Figure 3.4. Key design principles of the "light touch" phase.

Access was granted to collect data at FinCo during the "light touch" phase of the strategy process. I requested access to this phase due to the strategically focused activities that would be taking place during this phase.

3.4.3.3 Emergent Strategy-Formulation Processes

This third strategy process was an ongoing testing and adapting of the strategy throughout the year as part of the strategy-review sessions in relation to triggers that may emerge either from the environment or internally in the firm.

The process included seven steps in the bank's new strategy-management framework (see Figure 3.3). This process was split into two subprocesses, the first of which comprised three "formal" strategy-review sessions during the year. The aim of this process was to help evolve the strategy-review sessions to quarterly reviews and, as the process matured, possibly include a monthly "check-in". The review used strategic dashboards as well as portfolio of initiatives and benefits-tracking/ status-reporting tools to drive the ExCom, cluster, and department sessions. I recorded video data in the first session and realized that the format of the meetings and relevance to my research question was outside of the scope of the study. I therefore exited the field and began the data-analysis process based on data already collected in earlier sessions. Figure 3.4 provides a summary of the overall integrated formulation process.

3.5 Data Collection Methods

In the field, data were collected through participant observations, audio-video recordings, document and archival data reviews as well as informal conversations. Following the selection of the organization, and being granted formal access, data were gathered through an eight-month period. I observed different internal and external strategy meetings at multiple sites during various stages of FinCo's strategy cycle.. Table 3.1 summarizes the data collected regarding the strategic process.

Table 3.1. Overview of data collection.

The level within the organization	The number attended out of the total	Research method	Duration (hours)	Total time (hours)	Data volume (pages)
Executive Committee strategy meetings	1 out of 1	Audio-video recordings	10.2	11.2	275
		Observations	14.5	14.5	
Cluster-level strategy meetings	6 out of 6	Audio-video recordings	6.4-13.5	45.5	697
		Observations	0.5-9.0	68.4	
Departmental/ Subsidiary strategy meetings	5 out of 18	Audio-video recordings	8.2–12.5	68.3	554
		Observations	2.5–14.0	86.5	

Prior to my arrival at FinCo, I had been in touch with members of the SMO team regarding what I would like to observe and audio-video record. We agreed that I would follow the SMO team's working schedule, which was a good fit within the scope of the study as the SMO were responsible for the strategy-focused initiatives. I attended all strategy meetings facilitated by members of the SMO team for the ExCom and cluster-level meetings. However, I did not observe all the departmental meetings due to the timing of these strategy meetings, which were always held away from the office and sometimes ran concurrently. It was agreed, that I would not include data collected from the security department's meetings as the information discussed was sensitive. Two of the other meetings took place in hotel suites as opposed to conference rooms and these were excluded from the study as the space was different and incomparable to the other meetings. I then decided to sample at least one strategy meeting facilitated by each member of the SMO team as identified in their pseudonyms in alignment with

mandatory research ethical obligations (see Table 3.2). These were randomly sampled and I collected and analysed data from 16 meetings in total (see Table 3.2).

Table 3.2. The meetings from which data were collected and analysed.

SFA 1: 21 Oct	SFA 2: 2 Nov	SFA 5: 18 Oct	SFA 3: 4 Nov	SFA 4: 16 Nov	COO: 15 Nov
ERSD	FinStab	CMD	PA	FMD	HRD
FMD	FMD	Tswelopepe.Co	Finsurv	ERSD	Organization Dev
	PA	NdanloCo		FinStab	Comms
FinStab	ERSD	SMD	FinStab	Finance	CSD
ERPD	ERPD	Finance	ERPD	ERPD	Legal
Strategy	Strategy	Strategy	Strategy	Strategy	Finance
BSTD	BSTD	BSTD	BSTD	BSTD	BSTD
Comms	Comms	Comms	Comms	Comms	
Human Resources	Human Resources	Human Resources	Human Resources	Human Resources	Human Resources
Organization Dev	Organization Dev	Organization Dev	Organization Dev	Organization Dev	
RMCD	RMCD	RMCD	RMCD	RMCD	
Tsepho	Simon	Peter	Calvin	Oscar	Sipho

The first level of this protocol, the lowest level, was a test-and-adapt phase of the strategy for each department within the organization. There was a total of 18 departments within the organization.

Table 3.3. Light-touch schedule for the SFAs and departmental sessions.

SFA 1	SFA 2	SFA 3	SFA 3	SFA 4	COO
1 Nov	2 Nov	18 Oct	4 Nov	16 Nov	15 Nov
ERSD 10–11 Nov	Fin stab 17–18 Nov	AlphaDep 18–20 Oct	Risk 7–8 Nov	IERPD 5–6 Dec	HR 22–23 Nov
Strategy 8–9 Dec	NPS 15–16 Nov	BetaDep 18–20 Oct	Policy Dev 4 Nov	FMD 24–25 Nov	IT 28–29 Nov
BSTD 5–6 Dec	RMCD 14–15 Nov	Ndalo.CO 18–20 Oct		Legal 17–18 Nov	OD 24–25 Nov
		Tswelepelo.Co 26–27 Oct			FSD 22–23 Nov

Table 3.3 presents a summary of the different strategy retreat schedule. Data from all six cluster level retreats was recorded and analysed. The second level was the strategic-cluster level. There were six clusters covering the 18 various departments and five of the six clusters had an individual strategic focus area that jointly contributed to the organization's five strategic focus areas. I attended all five strategy meetings for the strategic focus areas. The retreats would last between one and three days, with most participants sleeping over at the venue.

The third level was the top-management-team level, also regarded as the executive-committee level. I attended one of these strategy meetings, which took place over the course of a day but were split between two different venues. The first part of the meeting was run in the morning by an external facilitator. The second, follow-up, session took place in the afternoon in a different venue and was facilitated by the internal head of strategy. Each meeting consisted of between eight and 34 participants.

3.5.1 Participant Observation

My participant observations followed customary ethnographic principles, which also resonated with dramaturgy (Burke, 1965), as signposted in the introduction of this chapter. Specifically, observation in the field setting involves listening to, as well as, looking at the interactions and doings that take place within the setting. This allowed

me to appreciate the nuance and complexity of action on display. According to Van Maanen (2006, p. 18), such an approach, "with its intense reliance on personalized seeing, hearing, experiencing in specific social settings continues to generate something of a hostility to generalizations and abstractions not connected to immersion in situated detail".

Being immersed in the situated details is particularly important because, from a practice perspective, "social and organizational life stem from and transpire through real-time accomplishments of the activities" (Nicolini and Monteiro, 2017, p. 111). To draw on these real-time social accomplishments, I needed to be present and able to observe the mundane, ordinary, everyday encounters in this analytical space. Observing the work engaged in by the participants in a naturally occurring setting is also integral to case study approach: looking at and recording the ongoing interactions in a focused and systematic manner is imperative as, in the micro and mundane, anything and everything can be found. To avoid observing without overly simplifying, I added a further four questions to the original five as recommended by Emmerson et al. (1995, p. 146) for questions one may consider while making field notes of such observations:

1. What are the people doing? What are they trying to accomplish?
2. How exactly do they do this? How do different people engage in the ongoing meeting?
3. How do people characterize and understand what is going on?
4. What assumptions do they make?
5. Analytical questions: what does this explain about the process? What did I learn from these notes? Why did I include them?
6. Any incidents/ moments that stood out today and why?
7. How are the participants using discourse during the meeting?
8. What are the materials implicated in the work being done?
9. Are there performative characteristics of the interactions?

These questions guided what I focused on during the meetings and outside of the formal interactions. In the formal meetings, for instance, I noted how bodily orientation among participations shifted according to the discussed content, how turns

were negotiated among the participants, the different tools used during the meetings, and the strategic outcome of the discussions. Although I was unable to capture all the interactions and discussions, I was able to note the visceral atmosphere and the peripheral actions that the camera may not have captured, for example the whispered conversation that would sometimes take place at the back of the room among participants who were engaged in conversations.

When sitting in the room observing such activity unfold, on one level I felt like I was an audience member watching a show. During these moments, I would make sure not to move, speak, or interrupt the ongoing activity. My role was that of an audience member who maintained a fourth wall with the actors, never interrupting their dialogue nor daring to go "on stage" to perform any of the roles myself. But when the show was stopped due to a technical glitch, I was like the novice director, trying to figure out what had stopped the performance. For example, there was a moment when Clive (a pseudonym) (who was the head of the SMO) said something that was a misquotation of what was said in a meeting that Peter (a pseudonym), (another participant), had attended. Peter stopped Clive's presentation, insisting that he correct his slide in front of everyone. Clive's response to Peter was "remember this is fresh off the press. We will get a chance to fix it as we go on". In that moment, it was as if the "performance" had stopped due to an actor saying the "wrong line" leading to the "script" being checked for accuracy. Once resolved, the "performance" would start again, as one would after getting a note from the director. I made sure to note all such interactions in my field notes for potential analytical relevance.

The third level of observation was as if I was one of the members from the strategy team or a senior team member, asking why they would attend subsequent strategy meetings, knowing from previous strategy meetings what was "supposed to happen" and noticing the differences. I would eat with the "crew and cast" and engage in friendly conversations. At the same time, I would be living with them, as we were all accommodated at the venue and I could access them on a personal level at the bar, during a smoke break, or while relaxing. I tried to arrive first at the venue and, if any members of the team stayed on after the workshop for drinks, I would join them and listen as a researcher as well as an acquaintance. This is aligned to symbolic interactionist approach to conducting observations (Blumer, 1969).

While I had initially conceptualized my role as solely that of an observer, I would at times be asked to comment on how a meeting went or if I had any interesting points I noted during the meeting. While some researchers may be interested into a more participatory role than expected, I was surprised and unprepared for this "reflective role" and requested not to comment so as to avoid making future participants cautious of my "analysis", as well as to avoid potentially priming participants based on my empirical foci.

While conducting participant observations, I utilized informal observations, which refer to observing the interactions engaged in outside of the official times allotted to the meetings. I did this by arriving before the participants so I could capture all their premeeting talk (Mirivel and Tracy, 2004). This would be no less than 30 minutes prior to the official starting time of the meeting. Often, this was when the SMO team would arrive and begin their preparations and final discussions prior to the meeting. I would set up the cameras and then began noting the conversation they engaged in prior to the start of the meeting and how these changed over time. I would note the transitions that would take place in the discussions and the emergence of different materials with the arrival of the first "non-SMO participants".

For instance, the conversations would shift and take on a more formal tone depending on who was arriving. I would observe these moments of transition and pay particular attention to interactions among the participants. I noted nuanced details like how they chose where to sit, the languages they spoke among themselves, references made to work or "the office", the items they placed on their desks as their "strategy tools", and who they chose to sit next to. When the meeting began, I would then observe the proceedings of the "official aspects of the meeting", only reverting back to informal observations during tea breaks, dinner, and evening drinks[3].

[3] I will reflect on the informal interaction in greater detail in section 3.7, which captures my experiences as a researcher in the field.

3.5.2 Field Notes

Field notes were used in the study as evidence of what was viewed to be relevant and important there-and-then. Writing field notes is both a systematic and selective process, which always involves interpretations, and it evolves over time. I maintained two notebooks while in the field, the first of which was used to keep notes on the formal observations. The field notes written during formal observations were employed as a mnemonic device (Jackson, 1990, p. 20). They served as aids to capturing an account of the participants' interactions as well as my reflective notes while in the field. These were based on what I was thinking or what I needed to ask after the meeting had concluded. I kept these notes and referred to them during data analysis to help in supplementing the collected video data. This helped to ensure that my narrative captured and respected the world as perceived by the participants (Denzin, 1997).

As I gained experience and confidence in the field, I began to develop a systematic approach to taking field notes. Having reviewed the video data and the field notes, I soon realized that I needed a systematic way of aligning the video recordings with the field notes to be able to use them as cue when analysing the data, months after leaving the field. As Barley (1990, p. 220) noted, "in the beginning researchers tend to be taken by panic and try to chase 'the action', in time they learn that important events are made into such in accounts. Nobody is aware that an important event is happening when it takes place …". The key moments presented in this thesis were not all noted as "significant and relevant" while I was in the field. When recurring themes and patterns began emerging across meetings, I began to pay careful attention to moments I had previously not been sensitive to (Emerson, Fretz and Shaw, 2001), where they were in the video data, and what significance they seemed to have in helping me answer the research question.

Over time, I began to write my field notes in a system that had three columns. The first column was used to keep time codes. I would write down the time at which the interaction noted occurred and a record of statements as verbatim as possible so I could later match what was said with when it was said when searching through the logbook of the video recordings. This served me well later when I analysed the video data as I could revisit the time and moment captured in the field notes and analyse it further by

reviewing the video data. The second column was where the interaction and participants' dialogue were recorded. It also included details of the setting, interactions, and strategic themes being discussed. At times I would sketch the interactions as a stage manager would during a rehearsal, focusing on blocking a scene. The third column was reserved for the emerging analytical conclusions (Lofland and Lofland, 1995). These later informed the codes developed during the data analysis and helped launch my analysis of the data as a point of departure.

Using my notebook during the meetings also helped build and maintain the role of a researcher. Taking copious notes denoted a keenness and interest in the meetings and unbroken interest in the unfolding interactions. It severed as a prop, "giving-off" (Goffman, 1959, p. 112) the impression that I was focused, interested, and invested in the ongoing activities. As I made observations of the participants, I too was at times observed. As one participant remarked:

"What is so interesting that you keep on writing in that book? Always busy writing away and recording us. You must be happy today there has been a lot of action in the morning! I want to see what you make of it in your thesis."

Even though I sat away from the main tables and tried to sit away from the participants' immediate line of sight, I would occasionally move and laugh along with the participants while sitting in the corner of the room, which the above participant was particularly attentive to (he was the one who took a keen interest in my research). He had had extensive training in his previous role on body language and once shared with me that he could tell when one of his colleagues was having a bad week just by looking at the colour of her nail polish.

The second notebook I kept was a personal one, a journal that captured personal thoughts, and I used it to reflect on incidents that took place during the week or at the end of a "difficult" or particularly "insightful" day. It was akin to a reflective journal. In it, I would write reminders of the decisions I made in the field and also to take care of myself. I found that writing about these experiences gave me space to put these thoughts and feelings to rest or aside. I kept notes of how I felt at times, the *faux pas* committed in the field, and the insecurities brought about by the research process. I

would, and still do, at times feel uncomfortable when in a social setting as I find myself reading meaning into all personal and professional interactions in my life. I found that I was not able to fully "de-role" from my assigned role as a researcher. This caused episodes of what Goffman (1959, p. 67) referred to as "role fatigue" and intermittent "role exit".

The entries in this journal did not necessarily relate to the research question but were "notes to self" and inwardly directed observations (Marshall and Rossman, 2011). This recognizes that the art of observing others is one that comes from practicing in one's own life to sharpen the skill of "seeing" and casting an empirical gaze on social situations. The unintended by-product of this exercise became, however, a source of anxiety for myself, as watching others led to a lot of inner-voice conversations about how to "behave" when in the field (Hammersley, 1993). Having immersed myself in the literature about the body and spending time in the field, I noticed how the act of observing people, along with the unintended judgement of certain interactions, led me to lose focus and become overwhelmingly anxious in formal and social settings. Seeing the footage would at times evoke emotional responses due to the content and the tensions seen among the participants. For instance, internalization of collected data would occasionally take longer as I would require time away from it to regain a sense of control of the process. This is important to acknowledge too. Due to the importance I place on mental health, as well as ensuring the integrity of my study, I returned to South Africa for support from my family and procured the services of a psychiatrist, a psychologist, and a life coach to support me during this period. Upon returning to the United Kingdom for the write-up phase, I continued to work with my life coach. Keeping a personal journal also helped me to process my journey as a researcher. Overall, field notes helped capture moments of significance and acted as prompts and analytical aids in the analysis of the data.

3.5.3 Audio-Video Recording

My first month of data collection featured no video data because I had not received permission to use a camera. Consequently, I chose to adopt an approach different from that suggested by Heath, Hindmarsh, and Luff (2010) by gaining gradual confidence

with the research participants in each meeting prior to recording. This was because the duration of the strategy meetings was too short for me to build rapport.

Video-recording is a relatively new method in strategy research (Gyfle et al., 2015). It is an essential tool for exploring multimodal forms of interactions between participants doing strategic work. As suggested by Rasche and Chia (2009, p. 726), the recent interest in similar methods by strategy-as-practice scholars stems from the analytical need to be "not merely as an interpreter of actor meanings and intentions but [to be] highly attuned to the minute, often unnoticed and seemingly insignificant, moves, mannerisms and dispositions of the strategist him—or herself". Equally important is that audio-video recording presents a reliable tool for systematic observation of the phenomenon of interest (Christianson, 2016; Heath, Hindmarsh, and Luff, 2010; Jarzabkowski, Burke, and Spee, 2015).

However, audio-video-recorded data has been highlighted by strategy-as-practice scholars as a form of data that is difficult to gain access to. This is especially so in strategy meetings due to confidentiality issues (Brundin and Melin, 2006; Christianson, 2016; Liu and Maitlis, 2015; Samra-Fredericks, 2003). This may very well explain the relative paucity of scholarly literature on the subject of video-ethnography in strategy as practice (Gyfle et al., 2015; Liu and Maitlis, 2014; Mengis et al., 2016; Vaara and Whittington, 2012). That does not mean, however, that the method has not been extensively utilized by a broader community of scholars from whom I also learned.

In particular, scholars within organization studies who pay attention to interaction and situated action within organizations, use audio-video recording as a way of gaining insights into practice-based organizational phenomena (Feldman and Orlikowski, 2011; Jarzabkowski and Spee, 2009; Miettinen, Samra-Fredericks and Yanow, 2009). Within strategy as practice, audio-video recording has been used to gain insight into organizational phenomena such as of embodiment and sociomateriality (Balogun et al., 2014; Orlikowski, 2007; Orlikowski and Scott, 2008), emotions among board members (Liu and Maitlis, 2015) and interactions among bankers on the trading floor (Jarzabkowski, Burke and Spee, 2015). Audio-video recording was thus used to enhance the data collected, as it offered me distinct ways of capturing, analysing and

later presenting moments of interactions among social actors (Heath, Hindmarsh, and Luff, 2010).

Following the time and motion study and the meetings I sat in during the pilot job-shadowing sessions, it became clear that, at FinCo, audio-video recording would be necessary for me to be able to capture how discursive, material, and embodied resources were employed in strategy meetings, which represent this study's phenomenon of interest. The format of strategy meetings requires prolonged periods of engagement to enable strategizing activities to evolve over time (Jarzabkowski and Seidl, 2008).

The fleeting nature of interactions engaged in during strategy meetings, and research with a focus on discursive, material, and embodied resources, requires a data-collection tool that captures all modes of interaction in real-time (Jordan and Henderson, 1995). The speed at which the multiparty activities among participants takes place and the durations of the strategy meetings preclude a researcher being able to capture all interactions in a nuanced manner. The significance of each of these elements could not be fully captured through observations and note-taking alone. In addition, the significance of some of the moments within the meeting were not evident during my observations (Leonard-Barton,1990); however, the audio-video recording enabled me to appreciate fleeting moments of significance retrospectively, link interactions across different meetings, identify patterns of interactions, and improve my understanding of the strategizing process as well as the complex specialist business jargon used by the social actors (Armstrong and Curran, 2006; LeBaron, 2008).

At the beginning of each meeting, I would set up the cameras prior to the participants' arrival and then (as much as I could) I would sit (away from the formal interactions) and observe the meeting from the premeeting talk (Mirivel and Tracy, 2014) until the last member of the strategy management team had left the room. The presence of the camera allowed me to pay attention to the looking aspect of the observation (Silverman, 2006). In addition, initial observations in the setting, as well as in the scholarly literature, indicated that the start of the meeting was as important, if not critical, to the outcome of the meeting as its middle and at times, its end (Gersick, 1988; Jarzabkowski and Seidl, 2008).

During my analysis of the data, the video recordings of the meetings enabled me to revisit the meetings setting and (re)examine the embodied nature of each meeting in a fine-grained manner (Gylfe et al., 2015). In particular, it aided me in making meaning of the interactions that took place among participants in meetings. One must be able to see what is happening *in situ* to capture, analyse, and make meaning of nuanced interactions (Cohen, 2010). It allowed me to revisit moments of interactions, and the displayed micro-behaviours, spatial settings, interactions, audio, and cinematic aspects of the meeting or workshop taking place (Christianson, 2016). This also meant I could retrospectively categorize data according to their analytical significance once the data had been collected and revisited (Johnson et al., 2007). Finally, due to the use of the tenets of microethnography and how scholars who use it present the data in publications (LeBaron, 2012), I was also able to use the still images from the video to support my analysis of the data, as will be seen in Chapter 4.

3.5.4 Documentary and Archival Data

I was granted access to emails, documents, memos, and developed content regarding the preparation of the away strategy meetings. In the weeks leading up to the meetings I was included in emails and sent meeting memos and the strategy deck used in the form of a power point presentation in the away strategy meetings. Articles, reports, and speeches, as well as newspaper reports regarding FinCo were collected to help build my understanding of the case study (Yin, 2009). Similarly, Marshall and Rossman (1995, p. 84) suggest the use of documents as a supplement to other forms of data as they can enrich the research; they are "useful in developing an understanding of the setting or group studied". This was true in this study as the industry in which FinCo operated meant a lot of learning for me about how the industry functions. Documentary data such as company reports and speeches presented by the CEO regarding the new strategy also proved especially useful in the strategic planning processes as the company's historic documents helped me obtain valuable data (Grant, 2003).

I collected presentation slides used by the SMO both before and after the away strategy meeting to compare the changes made to the strategy; I also attended their feedback

session to the executive committee, which provided me with insights into their interpretation of the process as well as key information that I needed to review when analysing the data. The documents used during meetings, workshops, and the away days, were saved and shared with me by the SMO team when requested as I did not have access to the shared drive or the organization's intranet. I also drew a lot of archival data from FinCo's website, as they publish their strategy, annual reviews, and external communications there.

Copies of the strategy calendar and the strategy process as well as a summary of all the clusters, departments, and subsidiaries were collated into a single document used to track the different strategies within each department. I was given a copy of this document and referred to these in the analysis of the data, as the structure of the away strategy meetings was framed by content found within the document. All documents collected throughout the process were useful in tracking themes and findings from the away strategy meetings and the internal workings of the process. They were especially useful in corroborating the interpretation of the ongoing strategy process during the away strategy meeting and the information given by members of the SMO team during our post-meeting conversations and reflections on the overall process.

3.6 Data Analysis

3.6.1 Organizing the Data

The data-analysis process began in the field with the first cycle of data collection; in particular, the data in the field notes were written in the formal notebook. The notes were then transferred into Microsoft Word using Dragon dictation software. This process helped me review the notes and reflect on what I was observing, as well as identify key emerging "hunches" and insights to look for in the next cycle of data collection. For analytical purposes I would add comments and words, which served as initial open codes, to the transcribed field notes based on the ideas that arose during the transcription of the notes. I would also note key moments from the notes that needed to be cross-referenced with the video data, so that I could log these for later formal analysis.

Due to the two angles I had of video data created from having two cameras of the meetings, I watched the full corpus of video-audio data collected three times. In the first viewing, I developed a video-data-logging sheet in Microsoft Excel in which I would log the name of the video clip, date of the meeting, duration of the clip, and nature of meeting. Two months after returning from my last cycle of data collection, I watched the entire corpus of data collected during the first cycle and second cycle of data collection. During the initial viewing of the data, I was able to augment my field notes with the recorded moments in this way. I summarized the ongoing interaction at ten-minute intervals to serve as prompts for moments of significance to the research question as well as the strategy process to discern, correspondence between my field notes and the video timecode.

The last aspect of sorting the data prior to formal analysis was done through sorting through the supplementary data. This included the strategy performance review pack given to me during the leadership conference, emails I was copied in to, documents provided by the SMO team, annual reports found on the internet, and PowerPoint presentations (both those used before strategy workshops and those that summarized the changes after them). I was invited to ask questions and email the SMO team if I needed further material, which I did throughout the analysis and write-up phase of the study. I would call and meet with members of the SMO team intermittently during the analysis and write-up phase to help clarify where information was needed to help me understand technical aspects of the meeting, as well as pose questions that arose during analysis of the data.

In alignment with Glaser and Strauss (1967) and Gioia, Nag, and Corley (2012), my process featured comparison across the data from the video recordings, documents, observations, and social interaction with the participants. This helped me develop the triangulation process, which Stake (2005, p. 454) defined as "a process of using multiple perceptions to clarify meaning, verifying the repeatability of an observation or interpretation". This enabled me to gain a deeper appreciation and understanding of the observations. Particularly relevant for the analysis and interpretation of the data was Goffman's (1959) impression management theory, as I recount below.

3.6.2 Analysing the Data

3.6.2.1 Erving Goffman: Impression Management Theory

To help me interpret the practices identified within the meetings and their meanings, I utilized Erving Goffman's (1959) impression management theory. Goffman's work stems from the larger field of symbolic interactionism. Goffman used the theatre as a metaphor to explain the ways that social "actors" make identity claims, prepare for and perform roles in daily social interaction. The purpose of such embodied work is to present and maintain favourable impressions of those with whom we interact so that such interactions evolve to our liking (Manning, 1992). One of the central components of impression management is establishing a shared "definition of the situation", or "working consensus" for what is to transpire during the interaction. More concretely, in order for people to know how an interaction will unfold, they first need to have a set of shared expectations about who will do what, in what order, and in what particular manner.

A fundamental principle of dramaturgy, of which Goffman's work is a part, is that "the meaning of people's doings is to be found in the manner in which they express themselves in interaction with similarly expressive others" (Brissett and Edgley, 2006, p. 3). This assertion builds on Kenneth Burke's (1965) suggestions that for one to understand and appreciate human behaviour, one must focus on action and what is presented, which is what dramaturgy emphasizes. The dramaturgical perspective is useful in explaining and interpreting the interplay between the discursive, material, and embodied resources in a collective activity, as a performance of any sort that incorporates all three.

Goffman (1959) developed the theory of impression management while conducting a study in a small rural community in the Shetland Isles (Lewin and Reeves, 2011). It was from this study that he developed ideas on performance, as well as the concepts of the backstage and front-stage regions. Specifically, Goffman differentiated between how people communicated when in the presence of an audience, where people over-communicated their gestures, while they tended to communicate less in the absence of that audience. Goffman referred to these two regions as the frontstage and the backstage, suggesting that:

> "… two kinds of bounded regions have been considered: front regions where a particular performance is or may be in progress, and backstage regions reaction occurs that is related to the performance inconsistent with their appearance fostered by the performance."
>
> (1959, p. 135)

Hare and Blumberg (1988, p. 3) noted that the dramaturgical perspective is "an instance of social interaction in a performance". This may feature a script, with parts for each member of the cast, together with the suggestions for how they may perform their roles, which may be seen from stage directions provided for the performance (Clark and Graeme, 1998). The approach starts with an idea that provides a basis from which those engaged in the interaction act upon this "actionable idea" of the situation (Goffman, 1959; Hare and Blumberg, 1988), which is referred to as the performance goal. For FinCo, the performance goals were to incrementally test the current strategy and adapt aspects of it that did not resonate or work for them, and thus needed to be changed. Such units of incremental change throughout the day were therefore the units of analysis, while how participants transitioned into active and non-active actors in influencing the change was the focus of the analysis.

According to the theory of impression management, the two regions mentioned above could be differentiated as the interactive and discursive areas, as indicated by the practices engaged in. It is important to note that Goffman (1959) used "performance" as a metaphor only, suggesting that the dramaturgical perspective can be used together with other forms of social-psychological perspectives. Similarly, in this study, the theatre metaphor is used to illuminate the difference between the practices that take place for, and with, an intended audience together with those who are intentionally engaged in the absence of an audience. This study also shows how these practices offer insights into what may be understood about the strategic work engaged in by those participating in the context of strategy meetings.

Importantly, Goffman's work was not initially a part of my theoretical framework; however, through the iterative process of my data analysis, I began to notice a difference in how members of FinCo interacted with each other during strategy meetings. Similar to a trip to the theatre, the venue where the strategy meeting took

place became the "set" for the "strategy performance". For example, the seating arrangement and focal point of the workshop had to be prepared, which resonated with the idea of there being a stage set up for actors. The act of ensuring that the tables were arranged in a way that would allow all to see the facilitator ("actor") meant that all who were part of the performance would have an insider's point of view, while those who were not organizers would not. When there was a glitch in the equipment used, there would be an apology for the inconvenience and the "technicians" (or what Goffman referred to as the "stagehands") would be with them soon. The parallels were there, but most importantly, how the participant-actors interacted with each other within the different areas of the meeting room called for a lens through which I could make meaning for the different materials used. Key to Goffman's (1959) theorizing are the props which people use in their performances and their doings.

The nature of the strategic practice being a series of strategy meetings thus lent itself a theatrical/ dramaturgical element similar to a performance. It had a performative endeavour, as some perform the role of the facilitator, and an aspect of being something happening away from the office and taking place at a specific site, similar to how one would go to the theatre. It also had the practice element, as the activities planned for the strategic work were aimed at an outcome or a new meaning, similar to how actors would gather and improvise or rehearse for a performance.

These parallels and similarities offered a great opportunity to see how the practices could be compared and contrasted according to the backstage and frontstage needs of their roles. Some responsibilities could also be seen as performance, as the facilitators had to prepare for the strategy meeting in a way that the attendees did not. The outcome at the end of a predetermined time offered all in attendance the opportunity to collaborate in the creation of a new meaning, as actors or those engaged in any type of ritual often do.

3.6.2.2 Zooming In and Out on Practices

The study focused on the manner in which participants negotiated their participation through the use of discursive, material, and embodied resources. For this study, I therefore used Nicolini's (2010a) approach of "zooming in" and "zooming out" to

"examine" the practice of meetings. The first of two important aspects of practices within meetings are the discursive and material aspects of meetings, i.e. what people say and what people do. The second is the historical situatedness of these "sayings" and "doings", which are found within the nexus of interdependent practices echoing wider in institutional and environmental frames. For example, I looked at the meeting between members from the same team during the initiation phase. Following this, I acknowledged that this was only one aspect of the analysis of the meetings, as I understood that this meeting was one taking place within the context of the rest of the day, a series of meetings which collectively fed into the organization's five strategy focus areas, and the wider historical contingencies of the organization that may have informed their discussions and interactions. This collectively constituted the guiding pillars of the organization and how it navigated its overall strategy within the banking sector. Zooming in on practices within the initiation phase alone (as an example) thus enabled me to see the nuance which contributed to the here-and-now of the situated practice. In this study, such zooming in was therefore done through the interrogation of what was done by the participants and how these activities contributed to the outcome of the meetings, via the use of methodological tools such as features of microethnography and conversation analysis. From these, I was able to better appreciate what the participants were physically doing through the granular analysis of the audio-video recordings. Zooming out (by looking at the strategy cycle as a whole) in turn allowed me to see patterns across meetings and theorize these by looking at the elsewhere-and-then of the other practices (Nicolini, 2010a). For Nicolini (2010a), there are two characteristics to "zooming out": the first traces the connections between practices, while the second asks how and why these connections across sites of practice operate. In particular, I focused on the "accomplishment of meaning" and the "lived directionality" (Nicolini, 2010a, p. 1403) of the practices employed by participants to negotiate their participation. This was achieved through a comparison across meetings, paying particular attention to observations and audio-video recordings.

3.6.2.3 Data Analysis

I drew on field notes and the audio-video-recordings of the interactions between the participants during strategy meetings to explore how participants accomplished

strategically consequential outcomes. For the thesis, I specifically undertook a detailed micro-analysis of six cluster-level, one departmental-level and one subsidiary meetings, each lasting for circa 8–24 hours (or a day and a half). Each meeting passed through the stages of initiation, conduct, and termination (Hendry and Seidl, 2003). The episodes collectively formed part of the "test and adapt" phase of the strategy cycle. The away strategy meetings were the ideal unit of analysis because they were orientated toward accomplishing three key objectives: to help participants understand the environmental context of the organization; to reaffirm the mission, vision of the strategic cluster; and to assess (and where necessary) reformulate the strategy.

I chose to apply a case analysis (Patton, 1980) by analysing each meeting as a stand-alone case, then compare them to each other in order to identify similarities and differences. To start building each meeting as a case, I watched each recording following the chronological order, noting different activities at different intervals of the meeting, together with the strategic issues (e.g. by identifying the issues raised by the facilitator, participant or predetermined issued included in the agenda). To achieve this, I followed the three steps suggested by Patton (1980, p. 388), including assembling the raw case data and writing a case narrative, which gave a readable descriptive summary of the case presented in chronological order, with highlights of key insights. This in turn enabled me to tell a story of what happened over time and identify the sequential progression of the strategic issue that arose during each meeting. Having watched all six meetings, I then watched a single meeting for the second time and coded this meeting as the exemplar case (a description and reasons for selecting this meeting is presented in Chapter 4).

To make the process manageable, I chunked the video clips from a single meeting into three phases: initiation; conduct; and termination (Hendry and Seidl, 2003; Jarzabkowski and Seidl, 2008). I collectively referred to these as the enactment phase of the performance of a strategy meeting (Hare and Blumberg; 1988). While in the field, I had also observed participants prior to the start of the meetings, and I referred to this phase as the pre-enactment phase as it consisted of premeeting talk (Mirivel and Tracy, 2004) and interactions. I also noted the interval phases of strategy meetings, which were during the day when the meeting was paused for refreshments and comfort breaks. As the third phase, I segmented the day by including the post-enactment phase. I defined this as the time from when participants arrived in the built environment

where the meeting was taking place on the first day of the away strategy meeting to the time when the last participant left the room. The dramaturgical perspective sensitized me to these moments as being of analytical significance. Segmenting the data in this way aligned with the "indigenous" arrangement of time and sensitized me to how different the practices engaged in were, at different times and phases of the meetings, as noted by Jarzabkowski and Seidl (2008). My analysis of the data consisted of seven broad steps, adapted from those used by Feng (2013) and Feng and Maitlis (2014) in their study of displayed emotions in strategy meetings. It also corresponded with Burke's pentad scheme, which developed systematic categories of analysing non-fictional dramaturgy (Schulman, 2017, p. 17). The steps, or stages, are as follows (they are described in detail in the remainder of this sub-section):

- *Stage1:* Analysing the places of performance and actors in the performance.
- *Stage 2:* Identifying strategic issues in each phase of meeting (performance goals).
- *Stage 3:* Transcribing verbal and nonverbal (embodied, discursive, and material interaction).
- *Stage 4:* Coding strategy-related themes in strategic conversations.
- *Stage 5:* Analysing interplay between purpose of performance and dramaturgical practices.
- *Stage 6:* Explaining relationship between issue type, dramaturgical practice, and participation in the strategy process (products of the performance).
- *Stage 7:* Explaining the relationship between issue type, dramaturgical practice, and participation in the strategy process (products of the performance).

Stage 1: Analysing the places of performance and actors in the performance

To start the analysis, I focused on the setting in which the meetings took place and how different participants engaged with these spaces and the materials pre-set in them. This stage of the analysis began while in the field. From the moment I entered the room where the meeting was taking place, I paid attention to how the space was arranged, the physical cues in the space for what was about to unfold, how different members entered the room and orientated themselves toward each other, and the pre-set materials in the room (e.g. the projected PowerPoint presentation, computer), the

choice of seating in the room, and who sat next to whom. This was coupled with participants' micro-interactions prior to the start of the meeting (e.g. who participants spoke to, choice of language, content of dialogue). These were of particular importance, as they offered me clues as to where to place the camera and how different members pre-empted the role they anticipated playing during the course of the meeting. From this stage of the analysis, I was able to identify different constellations of interactions among the participant in relation to the space and to each other (Goffman, 1969; Jarzabkowski et al., 2015).

Stage 2: Identifying strategic issues in each phase of meetings (performance goals)
I then went through each phase of the meeting and analysed the data to identify the different strategic issues that arose during the meeting. This included both verbal and non-verbal references to the strategic issue. For example, even when participants did not say anything, I noted points when they would take out a document related to the strategizing process and read it. This would later lead to a discursive form of participation by the participant, note taking, a side conversation with a person they were sitting next to, or it would be put away without any actions directed to the ongoing strategic issue. In alignment to previous studies, a strategic issue was defined as an issue that had significance to the formulation of the strategy (Ansoff, 1980; Dutton et al., 1983) or reformulation of the strategy, the mission, or the vision of FinCo (as per the aims and objectives of the SMO team). The moments when the strategic issues would emerge were identified as scenes within the overall performance of the meeting. The fragments of video data (Heath and Luff, 2015) were analysed as individual scenes (Goffman, 1969); these were 4–30 minutes long. These selected scenes were transcribed following Heath and Luff's (2015) suggested method. The transcription noted three key aspects of the away strategy meetings: the "talk and visible action" (*ibid*, p. 374), bodily interaction (*ibid*, p. 379), and use of materials such as strategy tools and technology (*ibid*, p. 412).

Stage 3: Presentations that actors give (embodied, discursive, and material practices)

The chosen scenes, kept in the order in which they appeared in the video recording and within the overall meeting, were then coded (Patton, 2002; Saldaña, 2016). This second viewing of a single meeting inductively developed my first order codes (Strauss and Corbin, 2011). To help with coding of the data, I approached the data having developed "sensitizing concepts" (Patton, 1980, p. 391). These concepts were based on the constructs of the study, such as participation (Goodwin and Goodwin, 1996; Laine and Vaara, 2015; Heath and Luff, 2015), embodiment (Heracleous and Jacobs, 2008; Wright, 2017), and dramaturgical concepts (Brisset and Edgley, 1990; Burke, 1935; Garfinkel, 1959; Goffman, 1969, 1971, 1979, 1983; Hare and Blumberg, 1988; Sarbin, 1976; Schulman, 2017). Dramaturgical analysis (see, for example, Hare and Blumberg, 1988; Schulman, 2017), along with some other concepts developed from the literature, all in an iterative process. Collectively, the sensitizing concepts gave me "a general sense of reference" and "directions along which to look" (Blumer, 1969, p. 148) when reviewing the field notes and watching the video recordings for a second time. Overall, in the first order coding, I employed six[4] coding methods from the 32 identified by Saldaña (2012, 2016).

Stage 4: Coding strategizing practices in strategic conversations

During this phase of the analysis I did three things whereby I firstly examined the literature and existing coding guides for senior team interactions from management literature (e.g. Beck and Fisch, 2000; Currall et al., 1999; Sturdy et al., 2006). Examples of strategic practices from these sources included, for instance, "initiating an issue, proposing, counter proposing, elaborating, pursuing and giving information, giving a specific suggestion, agreeing, rejecting, selecting and deselecting a proposal" (Liu, 2013, p. 54). I also consulted the literature on meetings (e.g. Gyfle et al., 2015; Hoon, 2007; Jarzabkowski, 2005; Jarzabkowski and Seidl, 2008; Seidl and Guered, 2015).

4 These were not applied all at once and some of them overlapped. Being able to distinguish between each coding method helped me make clearer distinctions between codes that overlapped or were very similar, and it also gave me a lexicon through which I could develop these codes.

Stage 5: Analysing interplay between purpose of performance and dramaturgical practices

Using the coding categories in Table 3.4 below, I developed second-order codes through the use of pattern coding (Saldaña, 2012, 2016). "*Pattern coding* [original italics] develops the 'meta code' – the category that identifies similarly coded data" (Saldaña, 2016, p. 235). Pattern coding enabled me to attribute meaning to the organization of the data. During this cycle of analysis, I watched scenes from the meeting selected in stage 2 again and changed a few codes based on this. In this stage of analysis, the primary aim was to identify the patterns that emerged from the data. I identified four kinds of participatory dramaturgical practices: (1) enrolling; (2) central participatory practices; (3) peripheral practices; and (4) dramaturgical persona.

Table 3.4. Coding categories.

Area/ object	Performance goals	Line reading	Stage blocking
Material resources	Strategic and social	Discursive resources	Embodied resources
DT: Desk table and as framing material	DL: Dramatize listening	SL: Speech length	BO: Affiliated bodily orientation
C: Chairs and their arrangement	ID: Inducting into performance persona	TT: Turn taking	TG: Turn given
BSC: Balanced score card interactions	ASR: Actively covering strategy report	TC: Triage comments and responses to unexpected questions	TA: Turn acceptance
WB: White board	FSS: Foreshadowing strategic issue	EI: Emergent issue	TD: Turn denial
WBM: White board marker	FS: Front-stage strategy proposal	ABI: Agenda-based issue	AA: Affiliate interaction
PI: Types of personal items on desk	BS: Back-stage strategy proposal	ER: ExCom-related topic (voicing) – ghosts	RD: Role distance
ST: Strategy template	SPQ: Establishing the strategic issue	S: Silence	ASR: Ascribed role
SLP: Strategy laptop PLP: Participant laptop	NS: New strategy proposed	DHR: Directed humour	ACR: Achieved role
SP: Strategy book	RS: Revised strategic issue	SUB: Super objective	FOR: Front of room
PPT: PowerPoint presentation	DS: Deleted strategy objective	SUB: Sub-texts	D: Distance from each other

Stage 6: Supplementing the analysis of the video data with other sources

The focus of this study was on the discursive, material, and embodied material resources and strategizing as practiced in strategy meetings. I chose to ground the analysis primarily in the observational data, which included the video/ audio recordings and transcripts of these meetings. However, I also drew on conversations with members of FinCo, the interviews I conducted during the pilot study, and the informal conversations I had with members of FinCo to provide a deeper understanding of the organization to supplement the meeting coding (where it could provide additional insights). For example, I listened again to the interviews I had collected and revisited emails I was copied in during preparation for the strategy meetings to review how decisions regarding the spaces were chosen and how the development of the final agenda progressed over time and among members of the SMO team and the respective HODs. At times, I would email members of FinCo to ask for materials I did not have or an explanation of the roles that people had within the organization. I presented my research findings at two leadership conferences in 2016 and 2019. In between these conferences, I visited the research site four times and had informal and formal meetings with members from across the organization. These helped with members' validation of my emerging insights (Marshall and Rossman, 2011).

Stage 7: Identifying second Order Theme and Aggregate Dimensions

Steps 1 to 6 enabled me to establish my first order codes. The literature was reviewed in light of the themes, phrases used by participants and recurring patterns in the interactions. Through the process of writing analytical memos developed micro-narratives and collated these into broader themes. The themes were initially based on the chronological order in which they appeared and the cumulative manner in which participants engaged in different phases of participatory acts within the of the away strategy meeting. My second order themes considered each phase of the meeting were noted and the scope of the research was refocused to include the themes and as well as the phases in the strategic episodes at which they took place. Most importantly the manner the themes were interconnected then became the focus of the analysis as they and enabled me to create aggregate dimensions which help explain the concepts that enabled the different forms of participation to unfold. Table 3.5 demonstrates the data structure of the research question and the data structure related to how the various

phases within the away strategy meeting were episodic in nature and how they collectively contributed the cumulative phases of the away strategy meeting.

Table 3.5. Data structure.

First order	Second order	Aggregate dimensions
Monologues with metaphors, transitioning identity toward theme team, and collaborative process of inclusion	Collectivising audience	Expositioning
Narrative and anecdotes, research framing strategy development "tests and adaptations"		
Statements that prescribe contributions and ideal, real and transitional "retrospective reflection" pretext "then and now and future" by hierarchical actors		
Symbolic, interpretative and prescribed orientation to props and artefacts	Set stage as frame for envisioned actionable idea	Premeeting interactions
Framing artefact and interactions (with)in them		
Constellations based on emergent regions and emergent affiliation – spatial orientation	Preparatory interactions	
Enactment of varying orientations toward actors/ Audience differentiations among actors		
Suspending formal structures and enforcing formal structure		
Materials as scripted pre-text authentication positions of actor	Positioning adaptations	Stance taking
Prescribed navigation and orientation toward strategic issue of orientation		
Authenticating practices and props		
Signalling issues and orientational of divergence	Testing and questioning assumptions	
Questioning process and testing original points of collective and individual reference		
Dismantle frame and negotiating perspectives disagreement in alignment		

Expression of interests asymmetrical "influencing" senior management in the foreground	Evaluation and Repositioning of desired future	
Distilling processes of consensus		
Expression of transient roles		
Audience differentiations		
Collectivised epilogues of process	Negotiating adaptations	Resolutioning
Navigating toward consensus		
Distancing through language code switching	Peripheral strategies of engagement	Affiliative groups
Clustered forms of variations in interactions		
Transitional modes of in meeting engagement to subset of participants		

3.7 Reflection

3.7.1 My Position in the Field

My role as a researcher became my primary focus area once I gained full access to FinCo. This title served me best in that I could ask any question and talk to anyone I met, as my access card had Warwick University as the organization I worked for. I wore it to every meeting I attended. When asked who I was, I was quick to show them that I was a student from Warwick University, here to learn as much as I could about how people at FinCo work.

Hare and Blumberg (1988, p. 156) referred to "role fatigue" as a time in one's performance in everyday life when one may grow tired of a certain role. I experienced this from time to time, especially when attending strategy meetings that ran for more than a day. My body and mind would reach saturation soon after afternoon tea. I would have to walk out of the meeting for up to an hour at a time just to take a nap in my hotel room or take a walk. I would physically feel as though my body was about to shut down and there would be nothing about the meeting I could continue to absorb (Van Maanen, 2011). The challenge with collecting data at strategy meetings was that there was information available to me throughout the day and night. Due to everyone sleeping over at the venue, I could have breakfast, lunch, and dinner with them, and

there were also post-dinner events and drinks to which I would be invited. I also had to make sure that all the video footage from the day was backed up on my external hard drive as well as on an air-gapped[5] computer, clear disk space, and make sure that all the cameras were charging overnight. This meant I was always "on" – a challenge I tried to mitigate in part by relying more heavily on video data in my analysis.

3.7.2 Ethical Considerations and the Importance of Anonymity

The key issues that are most relevant to ethical considerations in research include the consent of the research participants, the anonymity of the research participants, and the confidentiality of the research data (Punch, 1993). Ethics are critical in the advancement of academia and the protection of the study's participants. As Stake (2005, p. 459) aptly put it, "Qualitative researchers are guests in the private spaces of the work. Their manners should be good and their code of ethic strict." Throughout the duration of the research, it was of great importance for me to protect the organization, teams, and individuals who participated in the study.

The protection of participants' anonymity was emphasized. The participants' risks regarding loss of anonymity increase in studies using qualitative data methods such as observations and audio-video data (Wallace, 2009). The strategy I was advised to use, and which I considered regarding the safe collection, storage, analysis, and presentation of data entailed the following: the organization's identity was withheld, and the nature of its business limited to the broad banking industry; and I assured the participants that the primary aim of the study was not related to exposing the organization's strategy but was rather focused on how the strategic choices were formulated, implemented, and evaluated. In this regard, as the emphasis was on the research being process-focused, much contextual information may have been gathered

5 An air-gapped computer refers to computers or networks that are not connected directly to the internet or to any other computers that are connected to the internet. I purchased this computer for the sole purpose of transferring the data to the encrypted external hard drive and only used it one the internet eight months after it had been purchased. All the data were backed up and stored in a locker within my locked office.

that could compromise the organization; however, as this information was not relevant, it was not gathered in the first place.

There were three instances where I was asked to delete footage that the head of strategy deemed too risky to have recorded. The storage of the footage once recorded was also of major concern to the head of strategy as he worried that if it were to land in the wrong hands, it would entail considerable risk for those captured in the video and for the organization. As a result, I had to ensure that the collection and storage of the data was never compromised.

I mitigated these risks by analysing the data from my home-based office during the day, as well as at the shared lock-up office at the University of Warwick, after hours, when I had the shared office to myself. While in the field, all the data I collected was backed up on an air-gapped Apple Mac, which was used for the sole purpose of keeping a backup of the data and was not used to access the internet until the data had been backed up once I had returned from the field. I kept the data on an encrypted external hard drive, which will be stored and kept for up to five years after the completion of the doctoral study.

3.7.3 Research Limitations

Using audio-video recording in a bank to study how strategic meetings were conducted presented a plethora of ethical issues for the participants and for this research. The video cameras were an overt form of participant observation, which I felt, at times, was intrusive. This was due to my presence (as the youngest in most meetings), but even more so due to the presence of the cameras as at times some male participants attending the meeting would jokingly remark saying that I should have told them that I would be coming so they could put on their make-up. On the odd occasion, some participants would ask for any feedback on how they interacted during the meeting. However, and with time, the perceived intrusive nature of the cameras decreased, although there were always comments made regarding my presence and the filming that was taking place during the meetings. As a result, I tried to hide the cameras behind plants at the start of the meetings and covered the recording button with gaffer tape when the camera was in the direct line of sight of a participant. The longer the

meeting went on, the less people were aware of me and the cameras. However, tea breaks and comfort breaks would at times remind people that they were being recorded, because I would turn off the cameras and turn them on again when the meeting resumed.

In addition to the time spent in the field collecting data, I attended two of FinCo's leadership conferences, in 2016 and 2019. In 2016, I presented the findings of my pilot study and presented what the nature of my study for the thesis would be to the top 118 managers of the organization as a pathway to being granted formal access. In 2019, I presented the findings of my doctoral research. I engaged in formal and informal conversations with members of the organization to test the assumptions of the study and the findings. This is what is referred to as "member-checking" (Schwartz-Shea and Yanow, 2009, p. 62) and is critical to more ethical research practice. It enabled me to test the findings and verify areas if there were any aspects of the strategy process that I may have mis-interpreted, which could affect the validity of the findings.

3.8 Summary

This chapter has provided an overview of my methodology and I first discussed microethnography as the main methodological framework. I then presented my fieldwork with a view to exploring central issues such as access, choosing of the site, and its phased structure. This was followed by a detailed discussion on the particular data collection methods employed, which are video- and audio-recording, participant observation, and supplementary data. Finally, I discussed my data analysis, which was undertaken in two stages: first, the identification of interaction segments of relevance; and second, the reiterative development of analysis by moving between data and theory. In the next chapter, I present findings from the analysed data.

CHAPTER 4: ANALYSIS AND FINDINGS

4.1 Introduction

In this chapter, I address the following research question: How are embodied, material and discursive resources mobilized to enable/ hinder strategic participation? The next part of this chapter (section 4.2) creates a context for the remainder of the chapter. The section details FinCo's strategic process, a three-day strategy workshop, and where the recently launched for one of the six clusters is due to be tested and adapted in a 'light touch' process of strategy formulation. . Additionally, I present the six concepts identified from the data which contribute to how the three abovementioned resources are mobilized during the course of an away strategy meeting. I draw on Goffman (1959) as a basis for my interpretations, together with the inclusion of scholars that use dramaturgical analysis (Hare and Blumberg, 1988) in the interpretation of micro interactions (Schulman, 2017). I also include illustrative data to support my claims and interpretations. As will be explained in section 4.3 wherein I employ a theatre metaphor as an approach that enabled me to illuminate the six concepts. As such, I have described the concepts as closely as possible to the order and pattern in which they appeared, given the cumulative nature of the emergence of the concepts within the meetings. As such, participation unfolded in a micro-evolutionary manner in which strategic participation was established, enacted, and concluded by the actors.

In sections 4.4 to 4.8, I present how senior team members negotiated their strategic participation through two forms of participation, namely *preconfigured strategic participation* and *peripheral strategic participation*. I particularly demonstrate key aspects of the room in which the meetings took place, emphasizing how the interactions within the space contribute toward the establishment of the interpretative work performed by participants prior to the start of the meetings based on the arrangement of the furniture, symbolic placement of strategy artefacts, and participants' orientation towards each other. The significance of space as a material resource orients participants toward participation. In this chapter, I further present six episodes that contribute together to forming the preconfigured strategic participation, namely "*expositioning*", "*stance taking*", and "*resolutioning*". I also present two

concepts that together form peripheral participation: "*affiliative*" groups and "*huddling*". I conclude the findings chapter by asserting that, while there are preconfigured central practices of participating in an away strategy meetings, there are also unplanned or peripheral practices that happen simultaneously, such as when people change the language they speak, congregate around artefacts, or embody the role of being an active agent of strategic influence through improvised approaches to participating in an away strategy meeting.

4.2 The Strategic Process: Summary of the Three-Day Strategy Meeting

As mentioned in the previous chapter, the strategy process developed at FinCo was new. For the first time members from different departments and subsidiaries were required to coordinate themselves across a number of departments and subsidiaries. This was done intentionally to get the team collaborating and the organization to function as a single unit as opposed to a collective of different departments and functions within the bank. To enable collaboration, FinCo's strategy was built around five SFAs, which depend on interdepartmental collaboration; at FinCo, they are referred to as "cross-cutting" initiatives. Out of the 15 bank-wide strategy initiatives, seven were cross-cutting initiatives. Each SFA had a strategy theme team created to focus on implementing the strategic initiatives of the particular SFA. The strategy theme teams comprised different departments from the organization, which worked collaboratively toward achieving their respective SFA. All except one of the SFAs had teams that would not usually work together as they have different functions within the bank that do not necessitate that they collaborate. Although this was on the strategy document, there were still distal limitations that hindered collaboration in practise. Due to the organization being highly dispersed, away strategy meetings were one of the resources used by FinCo to enable coordination across the different teams as these enabled them to be collocated for a prolonged period.

This chapter will be based on the SFA 3 theme team. The case study (SFA 3) was one of five strategy clusters. The choice to use this away strategy meeting as the primary context through which to present the findings was based on the fact that Peter, the executive director responsible for this SFA, saw fit to have two departments and two subsidiaries (which members at FinCo refer to as the strategy theme team or strategy

cluster) taking part in a three-day away strategy meeting. The three consecutive away days were unprecedented in that the consecutive design of this particular away strategy meeting meant that I could trace the embodied interactions that took place among participants over the course of the three days. This led to a better appreciation of how practices engaged in on the first day of the away strategy meeting influenced the outcome of how participants resolved the strategy workshop on the third day. This three-day "light touch" or "test and adapt" strategy retreat enabled me to present the findings from the entire corpus of the data in a chronological manner. This strategy retreat was the only one of the six in which the cluster-level, department, and subsidiary strategy workshops took place over a period of three consecutive days. As Peter (Head of the Cluster) put it:

> "We combined the cluster strategy session and the department strategy session so that you walk away from these three days with no further strategy work. On the third day we'll consolidate it all, we'll see bottom up, we will see if all things are synchronized and aligned and if it is, then the next day when we get back it's about just getting on."
>
> (Peter, SFA 3)

This immediate successive design of the strategy retreat described above was of analytical significance in my analysis and presentation of the data as it enabled me to make immediate connections between cluster and department levels of strategizing. I was also able to make links between the dynamics of how the strategic interactions moved from detached to attached discussions as the participants shifted from a cluster level of strategic practices to a department level of strategic practices and then back again into a cluster level of strategic practices. The flow between cluster and department levels of strategizing was contained within the three days, concluded, and fed back in a manner different to that of other strategy retreats held at FinCo. For example, on the third day of the strategy meeting, NdaloCo presented their new strategy, which included the development of a banking app as one of their strategic initiatives. Having the opportunity to present these newly developed strategic initiatives meant that decisions (including decisions regarding implementation) could be made quicker because everyone required for the decision-making process was present in the room. This approach to strategizing helped expedite an otherwise

lengthy process, as will be further detailed later in this chapter. As expressed by Peter in the sentiments he shared with the team in his opening monologue of the away strategy meeting:

> "The one thing at the bank, I get the sense that you take a decision and then we need about three to four months to actually think about what the decision actually means before we act, I get the sense that that is how we are wired at the bank and part of this engagement, and as we plan for next year, is to say well how do we make a decision and as we are making a decision we start acting rather than starting to think about what the decision is."
>
> (SFA 3, Day 1)

For Peter, the three days were not just about continuity, but about structuring the retreat with the intention of expediting the strategic decision-making process as all members needed for the key decisions across the cluster were present.

The analysis of the consecutive days of the away strategy meeting also enabled me to review the different ways in which material resources, such as the white boards in the cluster level of the away strategy meeting and refusal to use it in some of the departmental meetings, gave me an appreciation of how the sizes of the teams influenced the efficacy of these material resources. Discursive resources such as whispers, which were prevalent in the cluster-level meeting, were less prevalent in the departmental workshop. This led to an appreciation of the circumstances under which peripheral forms of participation were used in certain circumstances and why they were absent in others.

This three-day away strategy meeting ran from October 18–20, 2016. The teams that formed the SFA 3 cluster consisted of two (of the four) subsidiaries, which are independent of FinCo and have their own governance structures, namely NdaloCo and TswelopeleCo. The two departments that formed part of the strategy cluster were AlphaDep and BetaDep. The strategy cluster and department sessions were organized in a consecutive series of meetings to enable strategic alignment. The teams that made up the SFA 3 strategy theme team are presented in Table 4.1. The members attending the strategy meeting were selected by Peter, as the head of the cluster, together with the various HODs responsible for the four teams that made up the cluster.

Table 4.1. Cluster teams in SFA 3.

SFA 3 cluster teams	Description
NdaloCo	An independent financial services company with its own board. NdaloCo is one of four subsidiaries.
TswelopeleCo.	An independent investment company which is one of four subsidiaries
BetaDep	This bank is responsible for the corporate and institutional banking within FinCo
AlphaDep	This department is responsible for the retail banking run by FinCo.

In Table 4.2 we see is the emic reference to the three genres of monologues. These were scheduled in the agenda. The first was the orientating monologue, entitled "welcome and introduction", which was presented by the most senior member of the team. The second was the "review and priorities of the strategic impacts", which was presented by the facilitator of the strategy retreat and summarized the sequence of events that had contributed to the strategy process leading up to the current strategy. The third was the "review of the environmental context", which was delivered by a subject matter specialist and referred to the eminent industry related risks and possible scenarios participants should consider as they tested and adapted the strategy. The participants who were responsible for the delivery of the monologue had a formal role in the away strategy meeting, which was scripted, transitory, and aimed at serving a pre-set outcome in the away strategy meeting.

Table 4.2. Template for each day of the away strategy.

Est start	Est End	# Mins	Topic	Lead	Outcome
8:00	8:15	15	Welcome tea		
8:15	8:30	30	Welcoming and introduction	ExCon/HOD	
8:30	09:00	30	Feedback from the conference	Facilitator	▸ Highlights and key messages from the leadership conference
09:00	10:00	60	The environmental context	SME	▸ Review and prioritise the strategic impacts
10:00	10:15	15	**Morning tea**		
10:15	10:45	30	The "why" of our strategy	Facilitator	▸ (SWOT) and review risks and previous year performance
10:45	12:00	75	The "how" of our strategy	Facilitator	▸ Affirm /refine the strategic focus areas for the cluster.
12:00	**13:00**	**60**	**Lunch**		
13:00	14:00	60	The "what do we need" of our strategy	Facilitator	▸ Test, refine and cascade the organisational capability objectives which support the clusters SFA internal processes on strategic impacts (strategy mapping)
14:00	15:00	60	Affirming/ refining success (measures, targets)	Facilitator	▸ Using the strategy map refine the strategic scorecard to measure success
15:00	**15:15**	**15**	**Afternoon tea**		
15:15	16:15	60	Affirming/ refining success (measures, targets)	Facilitator	▸ Using the strategy map refine the strategic scorecard to measure success
16:15	17:15	60	Affirming/ reviewing Strategic initiatives to deliver our strategy	Facilitator	▸ Using the strategy map and strategic scorecard, affirm strategic initiatives and accountability to execute the strategy
17:15	17:30	15	Close-out		

The first day of the strategy meeting focused on testing and adapting the newly developed strategy at the cluster level. The second day focused on department and subsidiary level strategy workshops, with the third day focused on each department/ subsidiary presenting strategy-workshop outcomes. Each of the four departments/ subsidiaries also had their separate strategy away days. Each department was testing their current strategy and making changes to respond to the changes in the organization and sector. The strategy review pack prepared by the SMO team for all strategy workshops was standardized across the organization and included a PowerPoint presentation of the strategy deck. Each facilitator used a deck customised for each department to facilitate changes to the strategy. Over the course of the day, the teams were tasked with working through seven key review points. The SWOT analysis was used to help the team "review risk in the previous year's performance". The intended outcome was that each team would be able to review all seven points, update the action log and assign accountability, and then share the outcomes with the rest of the cluster the following day. On the third day each department/ subsidiary had a PowerPoint-led presentation that summed up the changes they had made to their strategy. They each had 30-minute slots to present their strategy to the rest of the strategy theme team so the cluster could collectively agree on how these departmental/ subsidiary strategies (mis)aligned with the cluster strategy, while evaluating the implications that these strategies would have on the collective cash-management strategy. A final review of the cluster-level strategy was made on the third day, thus concluding the process.

Empirically, these three days were rich in dynamic practices, with embodied, discursive, and material resources being mobilized. I was able to draw a tight link in terms of the choices that participants made, outcomes achieved, and the evaluations of decisions with regard to the overall strategic process. Accordingly, the findings are presented in a style that aims to demonstrate the progressive nature of the establishment of strategic participation. The findings reveal that the participants negotiated their strategic participation through two forms of participation: central strategic participation; and peripheral strategic participation. These two forms of participation were engaged with through six interconnected practices: preparatory meeting interactions; expositioning; stance taking; affiliative groups; huddling; and resolutioning. The following section provides an introduction to the analysis and findings.

4.3 Introduction to the Analysis and Findings

In the interest of cohesion and readability, and given the size of the data as well as the importance of the granular detail in the interactions that constituted strategic participation, I first present representative examples of strategic episodes to illustrate the codes identified in the analysis of the data as larger concepts. The representative episodes also illustrate some of the sequential relations between different episodes and the cumulative nature of how strategic participation was accomplished. This sequential presentation of illustrative episodes enables me to present the emic power of lived experience, which is important to maintain the cumulative nature through which different resources were used throughout the away strategy workshops and to accomplish strategic participation. Second, based on my analysis of all ten strategy episodes, I present how the constellation of discursive, material, and embodied resources enabled actors to engage in two forms of strategic participation, namely, preconfigured strategic participation and peripheral strategic participation.

In section 4.4, I will present an analysis of five representative strategy episodes as examples of strategic episodes to illustrate the six concepts as they emerged in different phases of the meeting. These collectively formed what I identify as preconfigured and peripheral strategic participation. The six concepts fall within the three phases of a meeting identified by Hendry and Seidel (2003) and presented in Chapter 2. However, in addition to the initiation, conduct, and termination phases, I identified a phase referred to as the pre-enactment phase (Hare and Blumberg, 1988), which consisted of the time prior to the official start of the meeting.

Similar to Goffman (1959), the metaphor of going to watch a theatre performance may be used to envisage the cumulative nature of the establishment and enactment of strategic participation, as well as the discursive, material, and embodied resources used to enable or hinder strategic participation. Within the theatre, there are varying levels of interactions between the audience and the actors. Although there are numerous forms of theatre formats, the one I will use for the study is participatory theatre. This form of theatre performance is one where the audience is considered a collaborator in the ongoing performance. The expectation is that they will contribute in the performance and may at any given point change the trajectory of the

performance. In conventional theatre there is often a "fourth wall", a metaphor referring to an imaginary transparent wall through which the audience watch the actors perform the lives of the characters. Instead, in participatory theatre, there is an expectation from the actors that, at certain points in time, the audience will engage with them.

Interactions between the actors and the audience may be actor-led as they ask audience members a question. It may also be audience-led as they may allow themselves, when the opportunity presents itself, to interject, contribute, or change the outcome of the ongoing performance. In this theatre performance it is understood and expected that the performance is episodic; in other words, there is a clear beginning for the performance and a pre-determined end time. It is a performance that has some participants participating as actors (with pre-set planning and possibly scripts), while other participants are audience members (with no pre-planning but possibly with pre-set notions or expectations of participation). The actors and audience come together and collaboratively create the performance. The outcomes may be shaped and crafted by the actors to varying degrees; generally, however, roles are not fixed and may change at different points of the performance.

The scripts in the case of an away strategy meeting are the PowerPoint presentations, while strategy objects and artefacts are used as prompts and props that enable the actor, whether in a participatory performance or a participatory meeting, to frame the overarching trajectory of the "performance" that should follow. The understanding between the actors and audience members attending an away strategy meeting is that they are *collectively or mutually crafting the performance* with the intention of crafting or revising the strategy as the intended outcome of the away strategy meeting.

Thus, unlike in a theatre performance, all who were present were expected to contribute in the ongoing performance, similar to the role one would play in co-authoring a play. The fourth wall mentioned above would be removed, thus inviting audience members to collaborate in the performance. In this phase, it emerged that the real and symbolic meaning of the performance was that both actors and audience were expected to contribute to the ongoing performance by participating in the co-authorship of the performance. In this way, they would be co-creating a consensual reality with the actors, as well as by continuously observing and enacting so as to cue

in a response that would serve to acknowledge the performance given by the actor while contributing to the outcome of the end-product of the performance.

Situating the environment in which the meeting takes place as a stage may feel familiar for those who have to give a presentation or "watched" those enacting roles aimed at collectivising those present into an audience readying themselves to contribute toward the collaborative act. Such acts entail testing and adapting the strategy in the context of an away strategy meeting to enable individuals to contribute to what is being done. The away strategy meetings also served a purpose in that they functioned as an act, a coming together by members of the organization who are deemed to play strategic roles in the organization, symbolising a meaning beyond the "just meeting" to "being custodians of strategic decisions made on behalf of the organizations". The illustrative episodes are presented in the following order.

Pre-Enactment Phase: Premeeting Interactions as Context-Building Interactions

Episode 1: Premeeting interactions that took place among the participants. I start the presentation of the findings with a vignette that acts as the setting or stage-set (Hare and Blumberg, 1988) where the majority of the illustrative episodes took place. The vignette is representative of a typical environmental setting of an away strategy meeting. Much like theatre, an away strategy meeting is a location where the workshop takes place and, similar to a performance, takes place within a performance space; there are places within the space that delineate the role that one will be playing in the theatre performance, making for a site-specific performance as the setting and material within serving as the context in which participation takes place.

I refer to this phase of the meeting as the pre-enactment phase as it represents how the interactions that took place prior to the "official start" of the meeting emerged as empirically relevant to strategic participation in the away strategy meeting. In this phase of the meeting, I present two illustrative episodes of the pre-enactment phase. This also serves as a display of raw data from an episode that took place in the pre-enactment phase of one of the meetings. In this episode, I present first-order codes for the discursive, embodied, and material resources and how they contributed to my interpretation of the data and established the concepts presented in the findings.

Initiation Phase: Coproduction of Meaning Through Presentation of Monologues

Episode 2: The expositioning of participation through monologues and dialogic interactions. Here, I present how the performance "takes off" through a series of monologues presented by members of the team who have pre-allocated speaking turns within the meeting; members as actors would have a delineated part to play at the start of the performance. Notably, I present the emergence of monologues as a concept used within the establishment of the participation framework. Monologues were performed by the actors, while audience members engaged in dialogic interaction as a response to the monologue. Together, these two activities contributed toward the *coproduction of meaning among participation*, which I refer to as expositioning participation.

Conduct Phase: Stance Taking as a Form of Testing the Strategy

Episode 3: The strategic activity of *stance taking* emerged as a recurring pattern of interactions used by participants to negotiate their participation as they contributed toward the act of "testing and adapting" the strategy.

Conduct Phase: Huddling to Find Agency Outside of Meeting

Episode 4: At times, strategic consensus was achieved among participants. During such instances, participants engaged in *distancing huddles*, which took place during intervals, or momentary side conversations between participants.

Termination Phase: Resolutioning the Adaptations Made to the Strategy

In this episode, I illustrate how the resolutioning of strategic issues took place. There were two forms of resolving strategy decisions made during the course of the meeting; the first was the act of reaching collective consensus and the second was the act editing the PowerPoint presentation as a confirmation of the change being recorded as this signified the adaptations made to the existing strategy.

Schulman's (2017, p. 34) notion of "reverse engineering" suggests that one must be fully engaged to appreciate the inner workings of a social activity, when employing a dramaturgical analysis. Reverse engineering refers to taking an object apart to analyse its inner workings. In this chapter, I reverse engineer each episode by disassembling

some illustrative data within each episode to illuminate the significance of the inner workings in performance and elaborate how the concepts identified in my analysis of the data played out in situ. The first vignette illustrates the concept of *premeeting interactions* as the first of six concepts.

4.4 Premeeting Interactions as Context-Building Interactions

It's 07:15 and I have just arrived at the venue where today's meeting will be taking place. As I arrive, I notice the lake behind me and the lush garden which will serve as the backdrop for the next three days. I am met by a friendly greeting from Clive (the lead facilitator for today). Clive has positioned himself at a table in the front of the room in a corner furthest away from the door. Portia, Hlubi, and Thando (pseudonyms of the rest of the SMO team) enter and set up next to Clive. They talk about the traffic, the venue, and soon begin discussing final preparatory details regarding the meeting: "Did you get the final deck I sent you?", Clive asks; "Yes thank you and will adjust a few things for tomorrow" (Thando responds). This arrangement of the space is unlike the boardrooms at FinCo's offices, where most management meetings I have attended with this team have taken place. At FinCo, the boardrooms have oval tables, around which all members present sit in front of microphones that serve as the medium through which they speak in the meeting. Here, instead of the solid table, there are two rows of tables and chairs which form on a "U-shape" with a big space in the centre of the U that resembles a thrust stage – a stage used by most theatres to create intimacy between the actors and the audience. Here, each seating position is identical, with a note pad, a pen, a glass, a bottle of water, a blank table place card, and a bowl of sweets in all except on Clive's table. His table has a laptop, FinCo's Strategy Handbook, and the thick red "Strategy Performance Review Pack", which contains the entire organization's half-year strategy performance review. It is 8:04 and the room is buzzing with activity as different representatives from the subsidiaries and departments enter. Franklin (pseudonym), the head of HR at NdaloCo, walks in and begins scanning the room, looking for a place to sit. "May I sit in the position of authority?", Franklin says this as he points at the seat which is at the bottom part of the top of the U as he smiles. Tracy (pseudonym) replies by pointing toward where she and the rest of the team from NdaloCo have set up and she says, we are sitting over there. Franklin moves

toward where Tracy had pointed and places his iPad on the table and bag on the chair, then exits the room and joins other members of the theme team for some pre-meeting refreshments. Franklin was not the only one who sat with colleagues from his subsidiary; members of TswelopeleCo sat together, members from AlphaDep sat together, and the "position of power" along the U was later taken by three Group Executives (who were among the most senior members present in the meeting). It is now 8:22 and most members have taken their seats. Peter calls for Julia (pseudonym), the group secretary, and says: "We will need to get rid of this row (pointing to the front row), I wanted one row not two. No one is sitting in the front row. Please can we get the front row removed?" This request is duly noted and it is agreed that the front row of tables and chairs will be removed during the tea break as the meeting is due to start. It is now 8:29 am; Peter stands in the centre of the room, is silent for three seconds, and the room quietens down as he begins: "Good morning everyone and welcome to the SFA 3 strategy session".

Vignette 4.1

4.4.1 Material Resources: Space as a Symbolic Preconfigured Stage-Set and Peripheral Strategic Participation

Spatial arrangements and the use of objects and strategy artefacts were central to the strategic work done during the course of the away strategy meetings. The arrangement of the space and various objects found in the space delineated the *action area* (Hare and Blumberg, 1988, p. 156) for strategic participation. The vignette above presents how these materials served as opportunities to interact with materials as they contributed to the establishment of a context for varying forms of participation that later emerged within the space. Deliberate consideration went into curating the space for the intended enactment of a particular form of strategic participation.

For example, unlabelled or "nameless" place cards were elements meant to emphasize a preconfigured notion of the interactions among participants. Peter, the curator of the space, offers an explanation for the deliberate act of omitting a seating arrangement and the symbolic meaning he hoped the object would be associated with:

> "I was asked by Julia when we were preparing for this (gestures a circular motion indicative of the meeting space) if I wanted place cards and I said no, if you (gestures to the participants) don't know each other by now you shouldn't be here. You shouldn't be a part of this process or sitting at this table. You can't expect to achieve a strategy when you don't know each other … If you look at how the SFA's cut across the organization, you will see that we were very intentional about getting people to work together. We are one organization."
>
> (Peter, SFA 3)

Having "nameless" place cards was a material within the space that served as an aesthetic cue for the envisioned forms of participation expected from those in attendance. In the example above, Peter expresses the reason behind the act of intentionally omitting people's names from the place cards. The first being his expectation that the strategy theme team members should be knowing each other by name now, as they have been selected and brought together from across the bank to develop the SFA3 strategy. In the example above, knowing each other's names illustrates the level of familiarity expected to result in the coproduction of the strategy and demonstrates the level of familiarity participants should have with each other. Peter suggests that this is an important aspect of the enactment of strategic participation.

A second key aspect in the vignette is the spatial arrangement of the furniture within the space. How the tables were set offered those in attendance a "frame" (Goffman, 1974) for the preconfigured notion of the anticipated interactions due to take place between participants. For example, the tables were set to look identical in continuous rows next to each other, with no space in between each table. Figure 4.1 is a photo taken prior to the start of the meeting and Figure 4.2 is the floorplan of the space. In addition to being familiar with each other, participants were encouraged to sit around the table as equals. At the away strategy meeting participants were encouraged to intermix with no one having a predetermined place at the table as was the case when at the office.

Figure 4.1. Photo of the space, with Portia, Hlubi, and Clive setting up for the day.

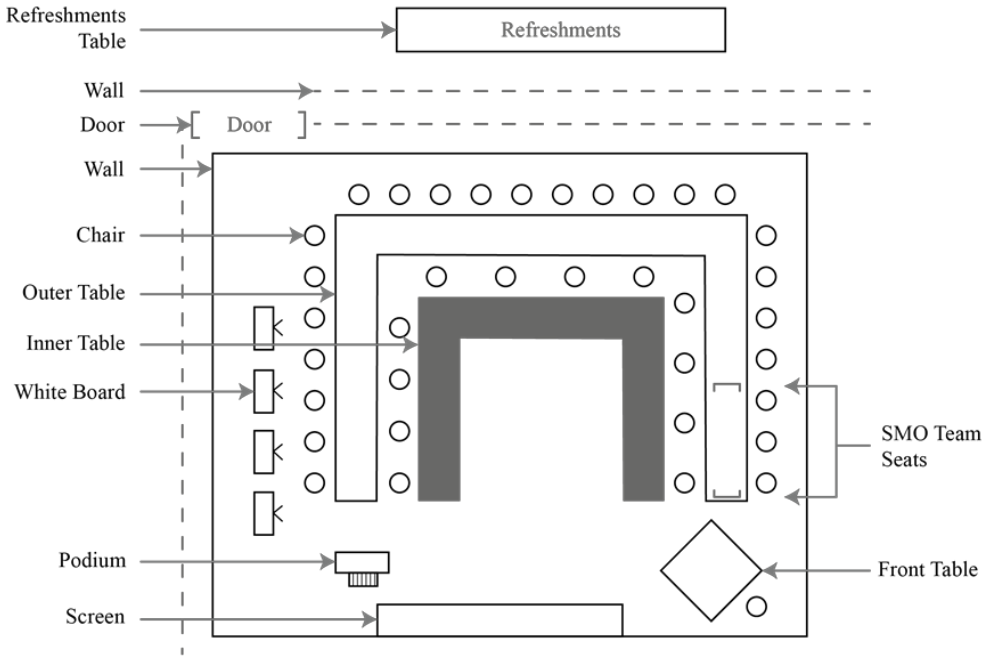

Figure 4.2. Floorplan for the strategy meetings.

In the vignette, Peter notices that there are two rows of tables as opposed to the "one" he requested, which has led to everyone sitting in the back row and thus, not being visible to each other. He asks that this front row be removed. The shaded area within the inner U-shape in Figure 4.2 represents the row of desks that were taken out during the meeting.

The spatial arrangement served as one of the multiple ways in which space was used as a resource meant to unify participants and enable them to connect through unhindered face-to face interactions. I asked Peter why he changed the spatial arranging and noted his response in my field notes:

> "During the break, I asked Peter (addressing him by his formal title) why he insisted on the removal of the front row of tables. (First, he told me off for referring to him with such formality and says it was a career limiting move not to call him by his first name – embarrassing). He then replied, saying 'I asked for this arrangement for the last day when we have more members from the cluster joining us, I need to see us to see each other'."
>
> (Field notes, 18 October 2016)

From Peter's assertion it was clear that the spatial arrangement was important not only to enable face-to-face interaction, but also so that everyone present would be visible to each other as this determined where they could and could not cast their gaze. The presence of the front row (a mistake) blocked people's sightline and created distance between participants. For Peter, the space was envisioned as one that was meant to bring participants closer together. In the field notes, and later within the series meetings, Franklin's assertion sensitized me to what I later noted as "affiliative groups", which emerged as a recurring pattern of empirical significance. It arose due to the absence of a pre-determined seating plan at the away strategy meeting; thus the emergence of what Goodwin refers to as audience differentiations. This later proved to be significant in relation to how people engaged within the meeting (as will be discussed later) and to how affiliative group interactions contributed to the strategic participation during the course of the meetings.

4.4.2 Embodied Resources: Premeeting Interactions Lead to the Emergence of Affiliative Groups within the Stage-Set

How people orientated themselves with the space prior to the start of the meeting positioned them for where they would be participating from for the rest of the day. A closer analysis of the relationships between participants sitting next to each other led

to the identification of a pattern, what Goodwin (1985) refers to as “audience differentiation”, as two dominant affiliative groups emerged within the meeting room.

Returning to the vignette, where the first reference to affiliative groups appears (albeit obliquely), I re-examine a question that Franklin addressed to Tracy, as he asked where she was sitting, to which she responded by identifying where she and the rest of her colleagues from NdaloCo were sitting. Franklin also made reference to infused meaning; he read into the space regarding the seats at the top of the U as “sitting in the position of authority”. While Franklin presented this question in the form of a joke, it later emerged that other participants associated this position with power.

Other participants (similar to Franklin and Tracy) split into two types of affiliative groups. The first was the pattern of sitting next to people who belonged to the same *institutional* affiliation, and the second was sitting next to a person with whom the participant had a *personal* affiliation.

Figure 4.3 is a photo taken moments before the start of the meeting. As noted by Peter in the field notes, participants sat next to people they were closely affiliated to.

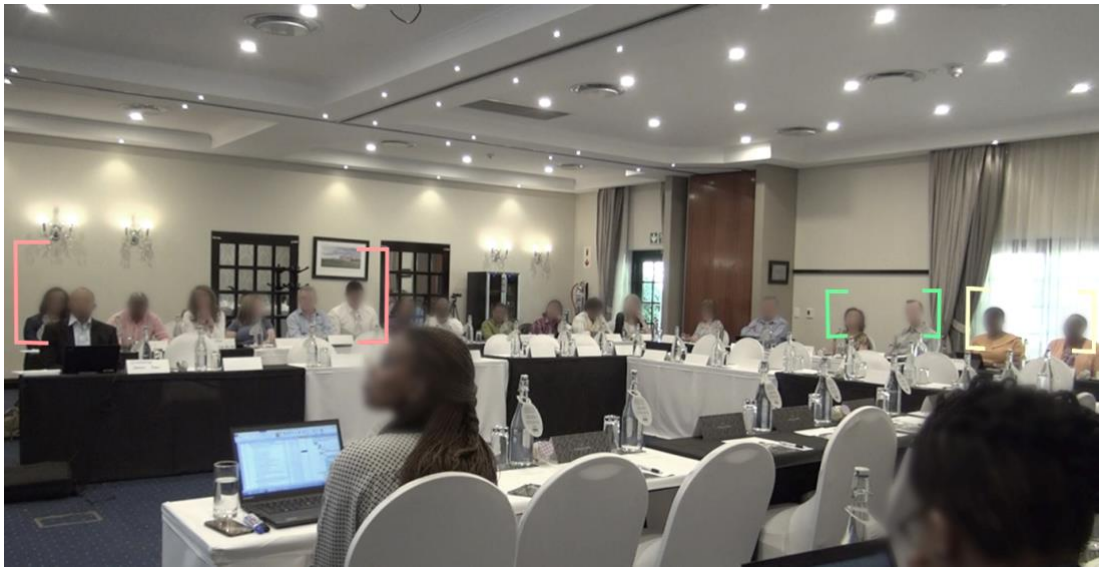

Figure 4.3. How the attendees positioned themselves in the space.

In Figure 4.3, I have placed three brackets to indicate the emergent affiliative groups. What we see in Figure 4.3 is an example of how subgroups emerged within the cluster theme teams.

A recurring pattern in the data, particularly in the cluster-level meetings, was that participants chose where they would sit and how they would orientate themselves in relation to others for the duration of the meeting according to their "achieved status", which is a role that one embodies based on "a set of expectations for a position that a person holds as a result of skill or knowledge or other achievement" (Hare and Blumberg, 1988, p. 153). Alternatively, participants sat in accordance to their "ascribed status", which is a status in society you are born into, like being a particular gender or race (Schulman, 2017, p. 259). In this case, it was their ascribed status in the meetings that determined where they chose to sit.

What the data shows is that there was an absence of intermixing as the avoidance of "sitting randomly" next to each other, thus hindering the preconfigured or intended notion of a homogenous theme team; members of the team sat according to the following achieved-status-related groupings. The first was the participants' *institutional affiliation*, which was based on the department/ subsidiary the member represented in the meeting, as seen with members of NdaloCo (see red brackets in Figure 4.3; all the members of the subsidiary sat next to each other). The second subgroup was based on the participants' *institutional ranking* (see green brackets in Figure 4.3; all members of the finance team sat next to each other). In Figure 4.3, the positions that had been pointed to as the perceived "authority" positions were eventually taken by the head of finance, a senior accountant, the head of human resources, and Peter (the executive in-charge of the SFA). In four out of the five cluster meetings, these "positions of authority" were taken by the executive responsible for the cluster and next to him were the head of department in attendance. In instances where participants sat according to their *achieved role*, it was common for people who primarily spoke the same language other than English to sit next to each other.

The audience members were not the only ones who sat according to their affiliative groups. Members of the SMO team were among the first to arrive at the built environment where the meeting would be taking place. They each took up a seat

nearest to Clive as seen in Figure 4.3. This was the first emergence of one to two types of affiliative groupings regarding how participants orientated themselves in relation to each other and the space.

4.5. Affiliative Groups: Institutional Affiliation

Figure 4.4 exemplifies what the backstage region, created by how Clive and Thando interact with each other in isolation from other participants and participations from the ongoing interaction by the materials in the foreground. Material in the backstage regions included materials such as the computer from which the running sheet for the performance would be based, represented in the form of the agenda. It included the strategy tools and artefacts used by the performer. An example of this is seen in the speakers on the table in Figure 4.2 which formed part of the performance in the revolving stage of the meeting as the actors would use it to play the video related to the theme of the scene for which they were facilitating. These were strategy props, available only to affiliative members of the SMO team due to their institutional role in the organization and their roles as "actors" the meeting. Even prior to the start of the meeting, the interactional asymmetries can be seen in the material resources available to some, but not all participants.

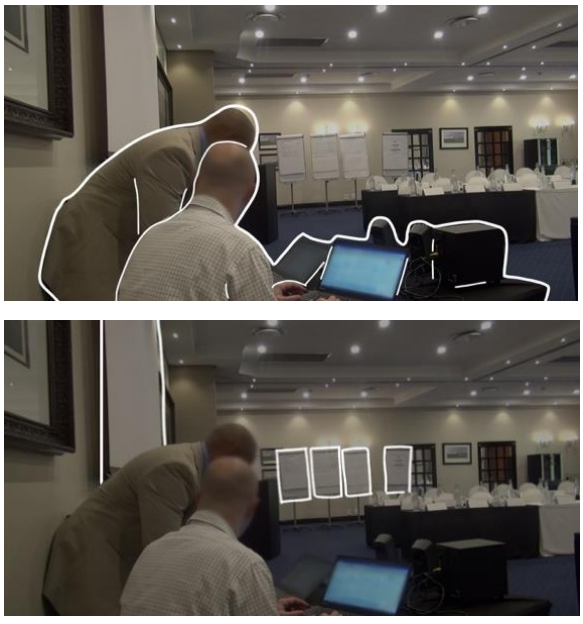

Figure 4.4. Thando (standing) next to Clive prior to the start of the meeting as they look at a strategy artefact.

The analysis of this region within the space used for the performance of an away strategy meeting gave rise to the finding that spaces used in said meeting may be understood as intentionally arranged to exclude audience members from seeing certain aspects of the strategizing process. This is achieved through the use of material resources as the laptops frame the point of focal prominence. Additionally, the embodied interaction as offer participants close proximity as they mirror each other. This is evidenced by Thando who is standing in Figure 4.4 closer to Clive than he would be in the frontstage region. This embodiment of the space indicated the deliberate act of having the conversation in private, thus indicating the initiation of backstage rhetoric, which was a discursive resource used by participants to partition information form audience members. The outlined parts in the image represent the backstage region as one that is both materially partitioned but also differentiated as a private working space in how the actors orientate themselves toward each other.

The arrangement, artefacts, objects, and materials used in the backstage region indicated the roles of the different actors and the arrangement of the props, tools, and artefacts on the audience members' tables. This spatial arrangement showed that the backstage region was a curated space designed to enable the successful performance of an away-strategy. This curation was not only the space itself but the embodiment of those who inhabit it as "performers" and their interactions as participant-actors.

The setting at which an interaction takes place creates a range of possible roles that individuals may play (Hare and Blumberg, 1988, p. 70). This was evident from where the members of the SMO team sat in relation to the rest of the participant-actors attending the away-strategy workshops. As seen in Figure 4.3, the members of the SMO team (or "performers") sat apart from the rest of the team thus creating a space within the room that differentiated them according to the roles they were playing. This positioning in the room was later indicative of the roles the members were to play in the strategizing process. The region within the room where they sat afforded them a certain perspective of the room with a particular angle from which to gaze. The SMO team was orientated toward the audience as opposed to the projected screen. They were in the role of controlling what would be presented as the directors of the performance from the backstage region. This finding contributes to the materiality of an away-strategy as it shows that the space used in practice of strategy is not only

situated but also indicative of the anticipated roles and forms of participation that were about to unfold during the away strategy.

In summary, this section has illustrated bracketing of the backstage through artefacts and tools. Building on that finding, it has demonstrated that this material arrangement shapes or determines embodiment and roles of participant-actors, hence shaping their interactions.

This section of the interaction reveals how strategists achieve strategic alignment among themselves, including ways of privately remedying any misalignment and possible knowledge gap. In Excerpt 4.1, Clive has come to the realization that there is a misalignment in what Thando did with team NdaloCo when compared with what he expected him to do. He was addressing this by explaining what the strategy tool Thando had received prior to the workshop that took place the previous day was supposed to accomplish. This is an example of what Goffman (1959, p. 129) calls "maintaining the situation" as is evident in line 155 in Excerpt 4.1.

Excerpt 4.1

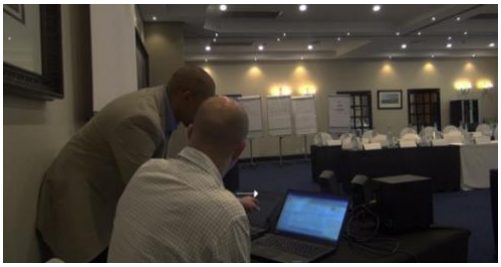

Figure 4.5

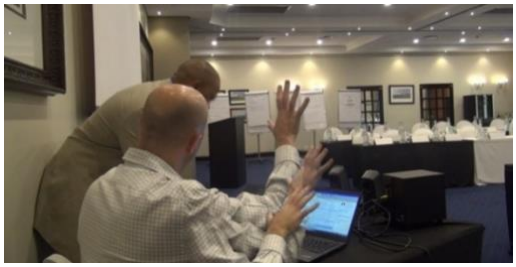

Figure 4.6

152	Clive:	But are their initiatives linked back to the strategic
153		objectives? [looking at Thando and there is a 0.2
154		second pause]
155	Thando:	Uhm no, we didn't even get to that
156	Clive:	Remember how you do it, so you do your
157		environmental analysis and your strategy map
158		[holding both hands up with the left hand representing
159		the environmental analysis and the right hand

160		representing the strategy map] and objectives should
161		be driving toward the main thing [moving the right
162		hand under the left hand] that we want to address here
163		[he points to Thando's screen] and then the initiative
164		supports the objective so they've got that flow.
165	Clive:	But are the initiatives linking back to the strategic
166		objectives and remember how you do it? Even
167	Thando:	[Thando interrupts pointing to his computer]
168		Which is this one?
169	Clive:	Yes [Gestures each slide again] environmental
170		analysis, strategy map and the initiative think they
171		must [Clive looked down at his wrist watch] meet and
172		change this before the start of the session. Those
173		initiatives [pointing to Thando's screen], if it's a
174		small little exercise [gestures indicating "small" with
175		his right hand and shaking his hand to gesture them
176		taking the strategic initiative out] take them off. Try
177		and see if they can just focus on what are the really
178		big things that are changing in the organization [Clive
179		held his hands together creating a circular mould] not
180		tweaking here and tweaking there [as he twists his
181		hands with each mention of "tweak"]. Otherwise we
182		will just have this sort of long list. [Pointing to
183		Thando's computer]. Try and see if you can link them
184		before that. I am happy with that. It's just maybe this
185		[points to strategy map] we need to say what are they
186		really [Thando interrupts]
187	Thando:	Big hitting items
188	Clive:	Yes, so can they get this to maybe just a one pager
189		with just the big ones - the big changes that are
190		driving those objectives. So, they have to link it back
191		to that. Otherwise it's just an operational object. So,
192		see if you can close off that discussion

193	Thando:	Yes.
194	Clive:	But send that to me in the meantime, so I can load it
195		on the system [Clive points to his computer]

What Clive displays through his interaction with Thando is a form of interaction which takes place in the among participants that share the same achieved status as institutional affiliates. Goffman (1959) refers to this interaction as a moment when the performers help to "sustain one another's morale and maintain the impression" that the show would run successfully to its completion. He keeps on saying "Remember" prior to explaining and takes the time to engage in a moment of "reminding" Thando of how the strategy tools work. In Figures 4.5 and 4.6, Clive points to the screen and makes gestures aimed at showing and teaching Thando how to use the strategy tool. This may be due to Thando being new to the role or a realization that there may be a misalignment in Thando's understanding of the strategy tool, which enables Clive to use this as a moment to further induct him into the team. Clive shows Thando how the tools they use inform each step of the strategy-formulation process. Clive explains that they should realign their understanding of strategic artifacts and process to "fix" the problem prior to the start of the meeting so that they may have a performance that runs in accordance with the script. In line 156, Clive changes the nature of the conversation from one involving the feedback session – which is how the conversation started – to being a short lesson in the use of the strategy artefacts.

The third point of importance is the outcome of the interaction as they arrived at a "cooperative decision" (Goffman, 1959, p. 129) about how to fix the misalignment Clive identified in line 168 where what is meant to be a presentation of the strategic initiative may end up being a presentation of "operational objects", which was that Thando must get hold of the team members from NdaloCo prior to the start of the meeting so that they may make changes to the strategic artefact. I present an analysis of this finding in greater depth in the section that follows.

4.5.1 Realigning the Performance for the Frontstage Region

The suggestion made by Clive in lines 167–177 relates to what Hare and Blumberg (1988) define as the "corrective process" of a performance, which they further define

as “actions taken to correct an instance of loss of face” (p. 154). The corrective process (Sarbin, 1976) may arise on the occasion when a performance has been presented and may not have gone according to the “script”. In such instances the backstage region gives members of the performance an opportunity to regress and act in a familiar fashion symbolically cutting off from the rest of the region so as to realign their upcoming performance.

Based on Clive’s response to Thando’s feedback, it seemed as if the members from team NdaloCo did not meet all the requirements of the second day’s strategy workshop. Clive offered Thando some suggestions on how to remedy the misalignment in the use of the strategy tools and the outcome of the previous day’s strategizing. He proposed a corrective process which would lead to the realignment of the strategy as well as the performance. I discuss the implications of this interaction in the section that follows.

Lines 167–177 were significant points to note in the interaction. They show that interactions which take place in the backstage area are used by performers to remedy situations which are due to unfold in the frontstage region. What Clive was suggesting was also of strategic significance. The changes Clive suggested would require that there be a few strategy-related decisions made prior to the start of the meeting by members of the team NdaloCo . That required them to decide what counts as “strategic initiatives” and what does not from the list they had drafted the day before. Thus, the decisions made just before the start of the meeting by members of NdaloCo would affect the overall outcome of the SFA team’s meeting. It was from these initiatives that the rest of the cluster was going to decide how they may collaborate, allocate resources and align the four departments’ strategic initiative to the clusters’ strategy.

It was evident in the data that affiliative groups began to emerge from the entrance of the first two participants. However, unlike the rest of the team, this affiliative group did have a predetermined seat, as Clive (and all other facilitators in the other workshop) always had a seat set apart from the rest. In Figure 4.2, we see how the table and chair were at a diagonal angle, which orientated the facilitator’s gaze toward the U-shaped table. Furthermore, in Figure 4.4, we see how the material resources associated with this affiliative group differs in terms of the objects and artefacts that surround them. For example:

> "Clive's table has two strategy documents: one is FinCo's official strategy plan and the other a strategy review pack. On his table there is also a clicker and portable speakers. Directly opposite him are four white boards which will be used later for the SWOT analysis. Clive sits away from the U-shaped tables at a designated table, separate from the U at the front of the room and nearest to the projector screens. His chair is turned away from the screen and faced inward towards the U-shaped tables. All the other chairs and tables are oriented towards the front of the room which has a projector screen. There are speakers (I think he brought his own), which are connected to the computer. Portia and Hlubi sit nearest to him and seem to be working on the strategy deck as well."
>
> (Field notes, 18 October 2016)

Clive's (or the facilitator's) table was positioned away from the rest of the tables and had strategy artefacts that differentiated him from the rest of the participants. This physical orientation to the space, content discussed prior to the meeting, and props available to Clive from his position in the space were all indicative of the asymmetrical form of embodiment by participants within the space. The visible performance also served as a cue for Clive's organizational rank and their role within the meeting. It is evident from the data that the power structure and formal manner in which participants related when at work had not been fully suspended. The joke made by Franklin exemplifies the perception of power within the space, even in the absence of the seating plan. Furthermore, in asking where his fellow colleagues from NdaloCo were seated, it was evident that the attempt to make the space and the materials within it symbolize unity had not been successful as Franklin and other members of the SFA 3 theme team sat according to their institutional and social affiliations.

The analysis of the pre-enactment phase of a meeting thus far has exemplified what Mirivel and Tracey (2005) refer to as premeeting interactions. In Vignette 4.1, participants present in the room engaged in a formal and informal conversation prior to the start of the meeting. Collectively, this discursive form of interaction is referred to as premeeting talk (Mirivel and Tracy, 2005). In Vignette 4.1, Franklin initiates a form of premeeting talk commonly referred to as "small talk"; a form of talk that involves "paying attention to the positive face needs of participants" (Holmes, 2000, p. 48). This discursive engagement in the vignette consists of cordial conversation,

revealing the relationships that participants have with each other, while "establishing and maintaining social relationships so work can function smoothly" (Mirivel and Tracy, 2005, p. 8). Furthermore, the premeeting conversations offer insights into their interpretation of the material resources. The first illustrative episode draws attention to this form of premeeting talk, while a second from of premeeting talk prevalent in the data was "preparatory meeting talk" (Mirivel and Tracy, 2005). This contributed to the establishment of affiliative groups and backstage rhetoric prior to the start of the meeting. I will now present the first of strategy episodes, which serves as an illustrative episode of preparatory meeting talk between two participants. The first order codes are included in the analysis of this episode so as to highlight the minute development of the interaction between the participants. In Episode 1, we join the interaction as Thando, the SMO member facilitating NdaloCo's away strategy day. It is in the morning of the second day of SFA 3's away strategy meeting. Thando is engaged in solitary work orientated toward his laptop. John (the managing director of NdaloCo) walks up to Thando and begins his premeeting conversation with Thando as follows:

Episode 1. Premeeting talk.

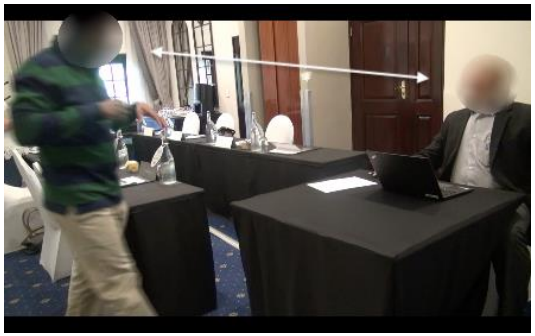

Figure 4.7
John: Thando, are you … are you … OK? (he asks while simultaneously rotating his left hand indicating that the "OK" is in reference the immediate context)

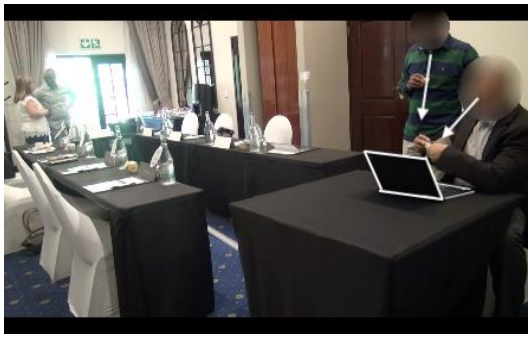

Figure 4.8
Thando: I am ok sir.
John: Good.

Figure 4.9
Thando: I'm happy that I looked at a lot of stuff last night that Thethi (pseudonym) gave me.
John: Mmm.

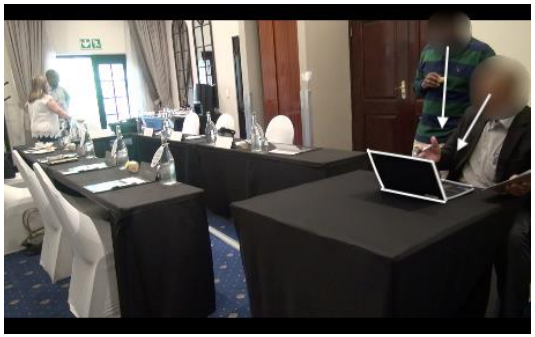

Figure 4.10
Thando: Very eh, I fou(nd) I thought was very useful because the … especially there was that future uh … what is it called it was called … uh *Vision 2014*, there are a lot of things there that I think we can use.

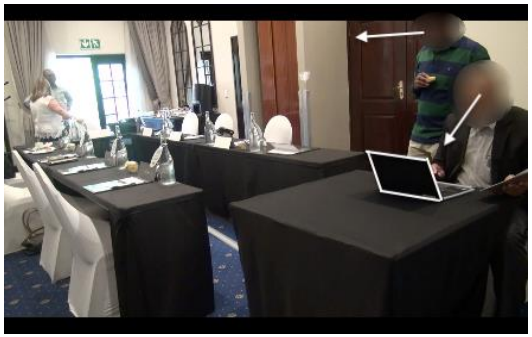

Figure 4.11
(John is silent as he looks away in Thethi's direction. John responds with silence looking away from the document and Thando and toward Thethi's direction as his upper lip curls up in disdain. John casts a silent gaze toward Thethi, who is unaware of the conversation between John and Thando.)

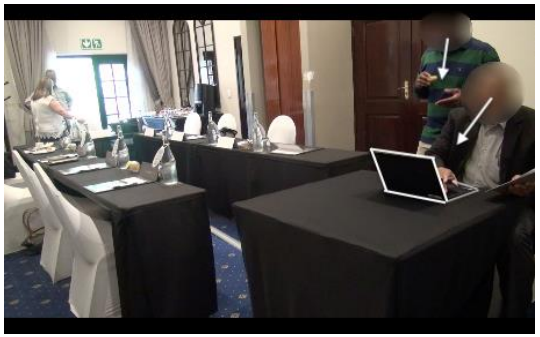

Figure 4.12
John: Ja (yes in a different language), so you can, we can (use the *Vision 2014* document) but I mean it's a, it's quite it requires a lot of context.
Thando: le let's [play it by ear].
John: [it requires a lot of context].

4.5.2 Discursive Resources: Premeeting Interactions as a Delineating Contributor to Strategic Participation

The first illustrative episode of the concept of preparatory meeting talk (Mirivel and Tracy, 2005) in shown in Figure 4.7, where John initiates the conversation and thematic content as he asks Thando if he is "OK", while moving his hand in a circular motion indicating that the "OK" is in relation to the current space and workshop that is about to take place in the room. Hearing the question and seeing the gesture, Thando responds to John's embodied communication in Figure 4.9 in a way that indicates that he interprets this question as one relating to the meeting and responds and engages in the genre of premeeting talk that Mirivel and Tracy refer to as "meeting preparatory talk" (2005, p. 14).

In Figures 4.10–4.12, Thando (who has only been at FinCo for three weeks) takes the opportunity to display his readiness for the meeting by using his laptop as a material to orientate John toward. In the series of interactions that take place from Figures 4.10–4.12, Thando refers to *Vision 2014*, a strategy artefact given to him by Thethi to help him prepare for the session as it contains NdaloCo's current strategy. Thando makes it known that he believes the document may serve as a material resource that may be of strategic significance and relevance to the upcoming workshop. John is resistant toward this, suggesting that it may need a lot of context and thus hinder the strategic work rather than enable it. Material resources used in strategic workshops were used once context has been given to them, and the absence of context and the coproduction of meaning to why they matter and how they may contribute to the strategy process was a theme that arose and a key feature to how participants were able to participate in the strategizing process. Having an understanding of where and how the decision they would be adopting originated is key to creating strategic continuity, and this was something that John felt would not be possible and thus might hinder the process they were about to embark on. Figure 4.11 illustrates how there was dissonance between Thando and Thethi's preconfigured notion of what should be given prominence in the meeting and what should be omitted.

John visibly shows his disapproval in Figure 4.11, as he looks toward Thethi, although John initially says "yes" to the using of the document, which Thando, who is not

looking at John, does not understand as a reservation; John's non-verbal expression, gaze, and bodily movement, however convey disapproval. He then verbally discourages Thando as he suggests that the use of the document would "require a lot of context". Thando, not having turned away from John, turns toward his computer, organizing his table as he picks up the note pad. In Figure 4.13, John is silent for 0.8 seconds.

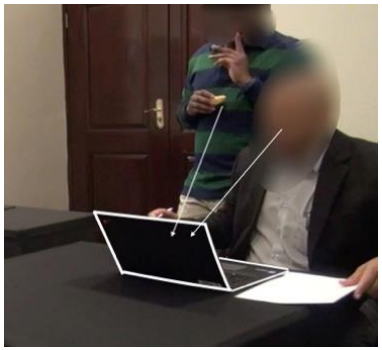

Figure 4.13
(John is silent for 0.8 seconds, and places his finger on his lips as if to think)

Figure 4.14
John: (now speaking at a slower pace) I … I would caution you against going to those things. They are so internalized I mean those things come from 2014. (John becomes silent)

Figure 4.15
Thando: Nah, that's fine you need them I thought, I thought, in terms of providing options.

Figure 4.16
John: (silently smirks swaying his shoulders side to side).

Figure 4.17
John: (has remained silent for a total of 27 seconds)
Thando: (sees John's facial expression) You know what but eh let's leave it out… you know I never got into the details, the only thing that I was trying to find, and I was trying to make the connection from yesterday to today.

Figure 4.18
Thando: (scratches the back of his neck)
Thando: I was … trying to find and I was trying to make the connection from yesterday to today.

Preparatory meeting talk often meant participants were in close proximity to each other, as they did not have the tables as boundary objects like in the rest of the meeting, and could thus rely on the use of subtle embodied resources such as silence, gaze, or expressive gestures (Jarzabkowski et al., 2015). In the Figures above, Thando's gaze is initially orientated toward his laptop, as the material resource around which the interaction is orientated, and it contains the strategy artefact he is sharing with John. Once he becomes aware of the discursive and embodied resources employed by John to display his perspective on the issue, Thando becomes aware of the "change in plans", which may result in the omission of *Vision 2014* from the meeting (see Figures 4.13–4.18). In Figure 4.13, the interaction starts off with John silently placing his index finger on his lip. The silence and gesture followed John giving Thando a word of "caution". Thando is unaware of John's accompanying non-verbal response as he has his back turned toward John, which leads to only parts of what John is communicating being appreciated by Thando. In Figure 4.14, Thando becomes aware of the "missed cues" previously performed as a non-verbal display and that there are now two directly competing views on what the "working consensus" (Goffman, 1959) of the meeting should be. The discursive resource used by John to communicate suggesting the omission of *Vision 2014* from the meeting is silence.

Unlike the small talk presented in the vignette, John and Thando engage in preparatory meeting talk (Mirivel and Tracy, 2005). Preparatory meeting talk is defined as a form of embodied "premeeting communication related to readying activities tied to the upcoming meeting" (Mirivel and Tracy, 2005, p. 14). Premeeting interactions were one way in which the context for participation was built among participants. Premeeting talk (interactions) consist of exchanges that occur before the scene becomes a focused gathering with a single point of attention (Goffman, 1961). In alignment with the theatre metaphor, preparatory meeting talk may be viewed as the moment an actor takes to prepare and orientate himself/ herself in the wings shortly before going on stage. These moments are crucial for actors, helping them get into character and focus their attention on the performance, but most importantly they are an important part of the day as they help establish the key message the actor must convey in the delivery of a convincing performance.

In this interaction, silence was used as a device to initiate the embodied act of "upstaging" the strategic artefact of focal prominence, as well as the performance of being a facilitator, which Thando embodies. A phenomenon that should be noted is the gradual shift from the computer and the strategic artefact it contains, being the material of focal prominence in Figure 4.13. Here, both Thando and John are looking at the document as Thando draws John's attention to its importance and significance to the upcoming meeting. From Figures 4.14–4.18, Thando displays a series of gestures that gradually move from one which embraces the computer, where the strategic artefact is presented, to an end pose which has his hand completely removed from the material resource (one hand touching his ear and one resting on his lap). This shift in the bodied orientation toward the strategy artefact happens simultaneously with Thando coming to the realization that John is resisting the inclusion of the strategy artefact and presenting this as a resolution, not an opportunity to engage in a dialogue about the benefits of its inclusion in the pending workshop.

As Thando turns away from the strategy artefact, the focal point becomes John. His physical positioning in relation to John, as well as his ability to hold the speaking floor through silences, changes the point of attention away from the material and toward John through the discursive use of silence. Thando initially hears what John is saying (but does not see the actions that accompany the talk). It is only when Thando turns towards John that he reads the expression on his face and understands the word of caution to be a performance of the embodied speech act of refusal from John.

An analysis of the period prior to the start of a meeting and the collective use of resources such as gesture, gaze, and silence collectively offer context and meaning to an interaction that would otherwise be read and understood as one that takes on a completely different meaning to the one intended by the actors. This type of interaction between Thando and John was enabled by the preparatory work Thando was engaged in and the absence of the audience. The physical proximity allowed for the use of silence and prolonged gaze as a mode of discursive and embodied communication that could not emerge during the course of the meeting as the presence of the table and other participants within the meeting leads to a collective form of interactions and distance between participants, which would not allow for the type of backstage strategy rhetoric engaged during the pre-enactment phase.

Returning to the theatre metaphor, Burke (1945) refers to the space and the arrangement of furniture, artefacts, and objects found within as the "stage-set". The practice of "setting" the metaphorical stage for the performance of strategic participation emerged as a material resource that was used to symbolize a preconfigured notion of the envisioned strategic participation. While the preparatory meeting interactions, such as the choices made by participants of where to sit, do not currently present an explicit link or hindrance to strategy-related outcomes. They emerged as being of significance regarding how participants later participated within the meeting. Their situated positions in the room and who they interacted with during the course of the meeting emerged as significant to constellations of interactions among participants during the course of the away strategy meetings.

4.6 Expositioning: Coproduction of Meaning

The official start of an away strategy meeting began with the presentation of monologues and dialogic interactions. Collectively, I refer to these activities as expositions to strategic participation. *Monologues* and *dialogic interaction* were the two forms of activities engaged in by participants to coproduce meaning and establish the focal point of prominence for the strategic participation. At all of the away strategy meetings, the first pre-allocated speaking turn was given to the executive responsible for the cluster or senior member responsible for the subsidiary or department.

4.6.1 Monologues as a Form of Expositioning Strategic Participation

The excerpts in this sub-section are taken from the opening monologue that Peter presented to the SFA3 strategy theme team at the start of the three-day away strategy workshop. We join the meeting (in Excerpt 4.2) shortly after Peter greets all those who are present. By physically moving toward the front of the room, Peter makes a non-verbal indication, similar to the act of dimming the house lights in a theatre, indicating that the audience needs to draw their attention toward the "stage". The noise levels in the room lower and people stop talking, with only a few whisperings.

Excerpt 4.2		
11	Peter:	We are on a journey, we've got a 2020 strategy that we have to
12		achieve, and it's not a sprint so doesn't help if you are here for two
13		weeks, two months you have to be here for five years to make it
14		count. As we go on this journey we need to really start to pay
15		attention to the small things, as we take each step the journey goes
16		further and if we only focus on one big leap to the end in year five
17		then I can guarantee you we'll land in a place we never thought
18		existed.

The *orientating monologue* is the physical act of participating as an actor about to "perform" in a manner aimed to collectivize the participants. Unlike all other presentations in the day, no PowerPoint presentations were used during orientating monologues as their performers primarily focused on connecting with the audience through gaze, gesture, and discursive resources. A recurring discursive resource used in the away strategy meeting to encourage a unified notion of the enactment of strategic participation was the use of metaphors as discursive resourced aimed at team building (Angouri and Mondada, 2018). A collective approach to the strategizing process was one discursively characterized as one that required each person present to symbolically disengage from being a member of their respective departments to a team on a journey (line 11) working toward their 2020 strategy.

The second characteristic of an orientating monologue was the identification of hindrances to the strategy process. The contextualising monologue was used by the executive committee to establish the terms of engagement among participants for the limited time during which they would be together (see Excerpt 4.3).

Excerpt 4.3

Figure 4.19

Figure 4.20

Figure 4.21

67	Peter:	…we have this, this, this, this kind of way of working at the bank
68		(Peter gestures in Figure 4.19, a gesture representative of a physical
69		structure) that says that, that when a decision is made, we want to see
70		the decision, we want to think (in Figure 4.20 Peter differentiates
71		between making the decision with clasped hands) about the decision,
72		and then will take three to four months to act. The other side of it is
73		I wouldn't act until I have a decision somebody from somewhere up
74		there has made a resolution therefore, I can act … (4 omitted lines)
75		So why don't we test (he says this while letting go of the thinking
76		represented in Figure 4.21 and opens his hands) and say let's do that
77		to do something and then see if anybody jumps and says you had no
78		power to do this so you test the boundaries in a different way. You
79		don't keep asking for permission you just go and do it and see if
80		anybody tells you that you didn't have the permission to do it (loud
81		laughter among the team members the team). Key to strategic
82		decision-making is empowerment, that is why I am saying you have
83		the right to do something and if somebody says you don't have the
84		right then they'll have to come and talk to me because I'm giving you
85		permission (audience claps as some laugh). Here we are making a
86		decision and we start acting rather than starting to think about what
87		the decision is.

A recurring impediment to the strategic participation in the implementation of the newly developed strategy was the official signing off at the executive-committee level, which took up to three months to be signed off and implemented due to the

bureaucratic culture of the organization. As a solution to this, Peter proposes that the context of the away strategy workshop temporarily suspend the organizational structures that hinder strategic decision-making. This was a key aspect of the away strategy meeting as the presence of a member of the executive team meant that decisions taken while at the away strategy meeting could have support and be endorsed once the team returned from the workshop. As a member of the SMO puts it:

> "The executive directors give the process legitimacy but at a department level we use their presence of the executive directors for two reasons. One is for them to understand what is happening at that level within the department and two, is so that they can relay whatever decision they want to the department."
>
> (Member of SMO team)

In the above excerpt Peter sets the tone for the strategy theme team, which suggests the establishment of a temporary anti-structure, in that he is allowing participants to temporarily embody so they may expedite the decision-making process and then act on these decisions without seeking permission from those in authority. From a dramaturgical perspective, Peter engages in backstage talk, which excludes those absent from the meeting, to establish the tone of the strategizing context he would like the away strategy meeting to encapsulate i.e. one that enables members to feel free to participate without being concerned about the strict structures that hinder strategic participation at the office. Also for them to engage as empowered representatives (line 77), with the temporary authority to make decisions as a theme team and immediately decide on how best to go about implementing the strategy.

Participants respond with laughter, because Peter's suggestions is one that goes against the hierarchical approach used to make decisions within FinCo; however, the "permission" to suspend the impediment that comes with the slow pace at which the decision can be acted upon is one suggested by Peter, a member of the organization senior enough to approve the strategic decisions made at a cluster level and as its executive sponsor.

The significance of the orientating monologue was that they established the strategizing context as one where strategic participation was encouraged through the

suspension of the formal structure that hindered and delayed strategic participation. The senior executive members' presence serves as an authenticating practice; it also establishes the strategic theme of the strategy meetings and the encouraged form of participation expected from the participants, i.e. encouraging participation as a theme team and displaying ownership of the decision made.

A second genre of monologue was a monologue aimed at offering participants a specialist view on a specific area within the banking sector, which they had to take into account when testing and adapting the strategy. Matthew (pseudonym), the Head of Risk Management across FinCo, was one of five subject matter experts (SMEs) to deliver monologues during away strategy meetings. Unlike Peter, Matthew has a scripted monologue, supported by research, to help authenticate the presentation he makes to the team:

> "Ok so um (clears throat), I was asked to say something about this; 'We don't know what we don't know' area and um I looked at all the surveys that were done about um emerging risks internationally and locally. I developed four scenarios that I thought I would describe so that if you make your horizon longer than just 2020 um the scenarios can be quite uh daunting. The first two I have just called them existential risks and the last two are reputational risks um where I said it's certainly going to harm our reputation if we don't get this right."
>
> (HOD of Risk and Operational Management)

Matthew authenticates his participation in the meeting by disclosing backstage discourse in which he has engaged with Clive regarding his inclusion and participation, and the expectations from his contribution to the meeting. Unlike Peter, SMEs had the role of bringing environmental developments within the industry and across the organization to participants' attention regarding the context in which the organization operated. Also on how various macro-level issues were significant as they could impact the organization and should be taken into consideration during the strategy process.

Table 4.3. Monologues as expositions for strategic participation.

Genre of monologue	Thematic content of the monologues
Orientating monologue (18 out of 18 meetings)	• Focus on micro-level strategic issues • Symbolically establishes strategizing metaphor • Establishes role expectation for audience participation • Orients participants to strategy impediments and expectations for workshop outcomes
Sequencing monologue (18 out of 18 meetings)	• Focus on meso-level strategic issues • Establishes significance of the strategizing process, how new framework is to be employed, and elaboration of how the strategy tools will be employed during the workshop • Presented by a member of the SMO team • Cascades strategy through plot-like narrative summarizing the sequence of strategic actives within FinCo since the launch of the strategy • Summary of new strategic initiatives and relevance it had on the strategy process • Orientates participant to strategic framework and cycle
Foreshadowing monologue (A summary offered at monologue was presented at 18 out of 18 department/ subsidiary level workshops)	• Focus on macro-level strategic issues • Orientates participants to industry related environmental threats • Developments in regulations • Presented by a subject matter expert (SME)

4.7 Stance Taking: An Enactment of Testing the Strategy

In this section I introduce a representative example of a strategic episode to illustrate how discourse, material, and embodied resources were simultaneously employed during interactions to test the strategy and consider the various ways in which it may be adapted. Stance taking emerges as a form of participation engaged in by participants to take turns proposing ways in which a new initiative or an existing one may be tested and later adapted. This was a practice used primarily in instances where an exit strategy was presented to the team and tested to see if it still served the team as well as when a new strategy initiative was being presented to the team.

4.7.1 Positioning Stance: Establishing Strategic Issues to be Tested

Towards the end of the first of the three days, Jim (pseudonym) has prepared a presentation that has three key strategy-related issues for the members of SAF 3 to consider: (1) the conversion costs for the strategy clusters' products and services; (2) the introduction of the baseline costs of cash management strategy; and (3) an analysis of a possible new strategic initiative called "One Sub" that would see TswelopeleCo. and NdaloCo merged. We join the meeting (Excerpt 4.4) as Jim opens the interaction:

Excerpt 4.4		
1	Jim:	Wow twenty to six and they give you an accountant [all laugh], sorry
2		guys, I look to keep it as brief as possible. First, I will be talking about
3		the conversion cost per product and cost per services unit. So, I have
4		been working on this project with various people in the bank as well
5		as people in the subsidiaries so high level I'm just going to jump
6		straight into what we are seeing as an outcome. Then I will present the
7		costs of the cash management strategy and then conclude with a very
8		brief analysis of the "One Sub" (short for subsidiary) that Peter alluded
9		to earlier. [Jim directs his gaze toward Peter] Peter, I did change it
10		slightly from our meeting on Friday [he says this while pointing to the
11		first slide]. One thing I did is, I removed imported costs, I found that
12		its distorted things quite significantly in terms of volumes and costs.

While the interaction functions as a greeting aimed at introducing the presentation, it is also indexing two roles embodied by Jim in the meeting. This combination of discourse, material, and embodied resources serves as demonstration of Jim's participation in the meeting as well as his strategic stance. In line 1–3, Jim gives verbal cues on his role in the meeting as strategy-theme carrier and sole speaker in the meeting. The first assertion is indicative of his participatory role in the meeting as a participant with a pre-determined role, which is discursively identifiable by his pre-allocated speaking turn.

Jim's orientation to other participants within the meeting room is a material resource used to establish his participatory role within the meeting. For example, Jim is positioned at the front of the room and is the only person standing. This physically depicts the constellation of the participation framework created by how a participant's body, in space, helps establish the organization of participatory attention. Jim, being the only member of the team with the clicker in hand, functions as a tool used to navigate the presentation and symbolically represents that he has the pre-allocated speaking turn, with the laser helping emphasize key points for audience members to focus on during the presentation. By standing having the clicker and using the PowerPoint resource, Jim also delineates the object of strategic attention. Collectively, he is able to establish his positioning stance through the use of a multimodal aesthetic language for drawing participants' attention toward himself as the person of interest in the meeting and then orientate the audience towards the stance he is about to take in relation to the object of strategic attention.

In lines 3–4 he establishes why he has this role within the meeting as his second assertion is indicative of his "achieved role" (Goffman, 1959) within the organization, as an accountant. From this, we can infer that one does not decouple from a former role for the emergence of the latter, but rather, there is a simultaneous embodiment of each role in the negotiation of one's participation in the meeting. His achieved status as a senior accountant gives him the role within the meeting and regarding the positioning stance; his presence is linked to his status in the organization and area of expertise (finance). Collectively, these embodied roles are of significance in establishing the positioning stance as they are used to authenticate his participation within the strategic episode that is about to unfold. Jim's assertions at the start of the

interaction, involving discursive, material, and embodied resources, represent the symbolic establishment of authenticating practices (Schulman, 2017) in the dramaturgical role played by Jim within the meeting.

There was a recurring pattern of stance taking, in that the person taking the positioning stance tended to assume this stance within the meeting in a number of important but distinct ways. Chief of these lies in the material and discursive referencing to external forms of authority that help them craft and position the PowerPoint presentation into a representation of the object of strategic attention. This is evident, for example, in the initial positioning, where the outcome is the establishment of how participants frame their position. For example, the PowerPoint presentation projected on the screen behind Jim contains data organized as a cost summary, which serves as an authenticating artefact of his expert knowledge of the subject matter. The presentation of the data and his verbal interpretation of it constitute the performative representation of the pre-text (Hare and Blumberg, 1988) he employs to frame and support his stance on the strategic issue within the strategy episode.

Another recurring pattern in the introduction of a positioning stance concerns how the local relevance of the stance in the meeting was established through the intentional act of indexing the legitimacy of one's stance by using a reference group to suggest that the positioning stance is one endorsed by others within the organization. Goffman (1959) refers to this group of people as a "reference group". A reference groups is defined as "a set of persons, real or imagined, who are important to an actor and whose opinions are used by the actor as a guide for the performance" (Hare and Blumberg, 1988, p. 156). Jim uses the reference group to position his stance in numerous ways. The first example is in line 4–7, where he makes reference to the diverse group of people consulted from within FinCo, as well as the subsidiaries, as part of the consultative process followed in the development of the content presentation. This reference to the reference group suggests that the positioning stance was one established prior to the offsite meeting and one endorsed by an absent subset of members of the organization. This is discursively indexed in line 7 as Jim uses a "we" to refer to the preferred outcome of the strategic episode from the perspective of the reference group responsible for the cost exercise (who he refers to in line 5). This interchange between "we" and "I" is an example of the transient participatory role he

plays in an away strategy meeting as both a representation of the stance co-produced with the participation of a reference group, and his mediating role in the meeting as a social actor embodying the stage in the frontstage of the meeting.

Jim also uses referencing to establish his positioning stance by repeatedly making reference to Peter when talking about the strategic initiatives he is proposing. In line 7–8, he highlights that the strategic initiative was mentioned by Peter earlier in the meeting and then, in lines 8–9, he engages in a simultaneous form of front- and backstage discourse with Peter. Jim's gaze and use of backstage discourse, as he refers to a conversation he had with Peter regarding the presentation, alters Peter's role in the meeting from that of an audience member to that of a collaborator who has knowledge of this positioning stance. This suggests a form of endorsement towards the stance that Jim is about to present. This reference to the most senior member of the team regarding one's stance serves as a symbolically significant act, as it suggests a second form of endorsement from within the meeting.

To help orient the audience toward the positioning stance, the participant presenting the positioning stance would suggest the envisioned strategic outcome as a cue for audience participation. Excerpt 4.5 illustrates the multiple resources used by Jim to orientate the audience toward the envisioned strategic outcomes established through the positioning stance. In this exemplar case, Jim achieves this by establishing the strategic issues, which he foregrounds as the strategic issues of focal prominence.

Excerpt 4.5		
51	Jim:	So, what we've got is a 2015/16 actual and a 2015/16 baseline. The
52		reason we are doing that is we want to remove the volume metric to give
53		you a normalized base line cost so your cost and performance can be
54		measured against base line. [Jim clicks to the next slide]. A very, very
55		brief analysis of the "One Sub" that Peter alluded to earlier. So, under
56		the assumptions that were to convert the two separate entities into one,
57		what would the immediate savings be? Largely it's around that
58		executive structure where you would be able to, instead of having two,
59		have one board of directors [Jim clicks to the next slide and presents a

hypothetical organogram and suggests how the organization would operate] Now, I just want to translate that for you into the operational costs.
[making reference to the entire presentation as he points to the presentation]
So, what would it mean when we go back to our measurable of reducing our per unit cost? The operational budget of the two subs is currently two hundred and seventy-two million so that eighteen million translates into about 6.6%, a further 4% saving could come from cutting inherent operational costs. Again, you know is it worth it? Perhaps one needs to consider the downstream potential advantages of the merger to the infrastructure and shared services, cause suddenly if you triple that you are looking at a 31.8% reduction in costs. Could this perhaps fall into that transformational space? [Jim directs the question to Clive who is sitting behind him by turning around and pointing at Clive]. This [pointing to the presentation with the costs] is just operational. Right any questions?

The use of rhetorical questions was a recurring discursive and embodied resource used by participants to establish the positionings to provide their evaluation of the possible strategic outcome(s). This discursive practice, coupled with gesture, would index the participants' subjectivity and simultaneously index their orientation toward a preferred strategic outcome.

Jim uses four rhetorical questions, which are followed by an answer as well as a reference to the data that support the answers he provides. Through the uses of rhetorical questions, Jim highlights the benefits of the merger as he highlights the potential savings that could be made and thus Jim frames the conclusion by offering a translation of what the key points should be. In lines 59–60, Jim sets up his stance and does this by offering a "translation" of the operational cost. Coupled with this stance, he presents a rhetorical question, suggesting what the ideal answer would be.

He repeats this pattern in what I refer to as a choreography of focal prominence in line 64, where he refers to the impact it would have on the "strategic transformational

space". He also highlights the "triple effect" that his would have on the savings; these cumulative points form part of Jim's frontstage discourse, which he uses as the conclusion of his presentation and the preamble to the question-and-answer session. Through the reiteration of the key points in the concluding remarks, Jim offers the audience an impression of the presentation that he believes the audience should engage in and draws their attention to the summary of the plot points. This presents the strategic theme or object to be discussed in the frontstage region and is the first invitation open to all audience members for discussion. In this moment, the subsets of audience members are established: stance-takers; and non-stance-takers.

Collectively, these discursive, material, and embodied resources function as an *authenticating resource* later employed by Jim to establish his *positioning stance* within the offsite strategy meeting. The interplay between the discursive acts of using rhetorical questions, coupled with embodied responses, represents an improvised choreography orientating the audience toward a suggested stance. And he uses both the discursive as well as the material to do so. He also foregrounds what he would like the audience to consider regarding the strategic initiatives presented in the positioning stance.

4.7.2 Repositioning Stance: Defining the Object of Strategic Attention

The second emergent stance from the data was the *repositioning stance*. Unlike the positioning stance, which establishes the strategic object, the repositioning stance presents an approach to achieving the strategic objective, encompassing the potential outcome and the benefits of the strategic objective. The repositioning stance initially questions the positioning stance by offering an alternative stance that repositions the proposed object of the strategic activity presented.

Once the positioning stance within the strategic episode above was established, participants orientated their participation in relation to it. Excerpt 4.6. is sequential to Jim's presentation and it presents how Peter established his stance in relation to Jim's presentation. What emerged from the data was that participants taking the repositioning stance did so in relation to the strategic objective. By giving focal prominence to an alternative aspect of the proposed object of strategic attention, Peter

helped the participants support him in his repositioning stance. We join the meeting following six seconds of silence as Jim awaited a question from the audience. Peter, who in this example was a participant, presented the repositioning stance.

Excerpt 4.6		
		[Peter begins the interaction by leaning forward and calling out Jim's name]
14	Peter:	Jim, I mean the interesting thing here is now (.) [points to the
15		presentation]
16		[waves his hand to the side as he says] let's leave aside the one
17		subsidiary two subsidiary debate. That's a business case we will get
18		to another time. What's interesting here are the costs [Peter pauses
19		for three seconds and looks around the room. Once the audience cast
20		their gaze toward him as the speaker Peter looks at Jim and gestures
21		for him to go back a few slides with his hand and then with a verbal
22		request] go back two slides. [Jim goes back two slides and shows the
23		strategy theme team's operational costs in the presentation. Peter
24		[pointing to the slide] says what's interesting here is that it gives us
25		a baseline. [Peter looks and gestures to Clive] It gives us a simple
26		measure [Looking at Peter]
27	Clive:	On the score card [nodding]
28	Peter:	And now we can populate the (balance) score card (11 omitted lines)
29		now we have a baseline, now we can start to track and measure our
30		progress year-on-year. So "this" [he is raising his left hand as a
31		reference to the cost of operation] is what is coming down over time
32		while the "quality" [raising his right hand to represent the service
33		going up] of our services and products are improving.

Prior to speaking, there was the six seconds of silence. Peter uses the silence to form a secondary stance, the repositioning stance. This repositions the initial stance through a shift from what was initially proposed to an emergent option. The positioning stance emerges from a sub-practice that helps to present an alternative stance that the team could take regarding the strategic object. In line 17, before presenting his stance, Peter uses contemplative silence to establish his position. Similar to sound effects in a

performance, silence is used here as a moment engaged in by all to consider and contemplate a position. This was similar to the way Jim had finished his presentation.

However, at times, speakers would use silence for dramatic effect. The pregnant pause is sometimes used prior to a critical point being made. For example, in line 17, Peter establishes a repositioning stance through the interplay of four resources: discourse in the form of silence to gain the audience's attention; language; gesture; and the strategy artefact.

For example, in lines 14-15 Peter presents an evaluation of Jim's positioning stance with an evaluation of the merit of the presentation. First, Peter uses gesture and discourse to disqualify what he refers to as the "merger debate". Through his gesture and disqualification of the proposed merger, Peter shifts what Jim had positioned as a matter of significance to the ongoing strategy episode away from the frontstage discourse into backstage discourse. He suggests that this should be considered in a different forum and should not be strategically engaged with at this meeting as it may require a business case.

Peter then uses the material resources previously presented by Jim to reposition the audience's focus towards a different stance that has emerged. The repositioning stance orients participants towards alternative ways of viewing and approaching the strategic objective identified in the positioning stance. Peter achieves this by reorienting the audience to a different object of strategic attention. He attains this through gesture and discourse, for example; when he requests Jim to move back to a particular slide. Once this slide of interest was the object of prominence; he uses his gaze here, together with silence, to draw the audience's attention.

Peter uses a pregnant pause as a discursive resource and the PowerPoint presentation to align the audience's attention by proposing a new stance in line 22 as he suggests what the audience should consider to be "interesting". He uses silence to gain the audience's gaze and then proceeds to establish the object of his stance as he singles out only one slide from Jim's presentation as being of significance to the team and what they should focus on. The act of establishing focal prominence in stance taking

emerged as a recurring pattern used to orientate the audience to one's preferred strategic outcome.

A second recurring characteristic of the repositioning stance was that the participant who presented could not only change the strategic issue of focal prominence but could also suggest an alternative approach that could be taken towards achieving the strategic objective. Peter, for example, suggests that what Jim has presented as data and positioned a costing exercise is actually of greater value to the strategy theme team as a strategy artefact. He does this by redefining the PowerPoint presentation as data that could be used as input into the strategy balance scorecard.

As seen in this example, Peter initially responds by saying that "we acknowledge this stance" and "wish to reposition that by challenging your definition of what the strategic objective is". He goes on to suggest that in doing this, they would challenge both how they engage with the strategic objective and find an outcome that would be "strategic".

He also suggests that the benefits that would come from changing the positioning stance would take away the need for external legitimacy, as per Jim's suggestion of a merger that would have required a business case. This way, he finds members within the meeting to support the repositioning stance taken. Unlike Jim, Peter looks within the room for alignment to his stance when he makes reference to Clive. Clive responds to the cue and affirms the proposed reconfiguring of the data into the development of a strategy artefact. This co-production of meaning within the meeting helped create advocacy for the repositioning stance.

4.7.3 Questioning Stance: Interrogating Underlying Assumptions to Potential Adaptations

The third emergent stance from the data was the *questioning stance*. This stance emerged in the data in instances where the positioning and repositioning stance had taken place and a member of the team would propose that the notions presented in the preceding stances be opened up. This would be done in aid of further questioning and scrutinizing for their strategic validity and relevance in relation to the aims and

objectives of the object of strategic attention. Here, further questioning was a broader interrogation and request to suspend previously presented assumptions upon which the position and repositioning stance had been based. This emerged as a sub-practice engaged in so that each one of the previously proposed strategic objectives identified in the two previous stances could be held up and questioned.

Excerpt 4.7 exemplifies the questioning stance; it follows on from the strategic episode used to exemplify the positioning and repositioning stance. We join the same meeting as John (the managing director of NdaloCo) for the ongoing interaction.

Excerpt 4.7		
1	John:	I would like to say something
2		[Peter nods]
3	John:	About the subsidiary review…
4	Peter:	…We have to
5		[Peter stops midsentence then stops and indicates that John may
6		continue]
7	John:	Uhmm sorry.
8		[Peter nods for him and begins stroking his legs rocking back and forth
9		throughout John's speaking turn. He gestures that John should
10		continue to speak, but John is silent for two seconds, and then begins]
11	John:	Um the subsidiary review, I think, I mean, is just a cost issue that we
12		are looking at? Cause I mean, I am sure that if the cost saving is
13		significant then it becomes a completely different case. I think that
14		point is clear [John pauses] I think that there is another discussion that
15		needs to happen that we need to have, and the CFO's should lead these
16		conversations [John turns his gaze toward Tracy, the CFO of NdaloCo
17		who nods in agreement and then looks at John as he say the second
18		part]. If we suspend the cost debate why else does it (the merger) make
19		sense? Ok, so that if it's just a cost decision we also must be clear
20		about that. (looking at Jim). We need to probably suspend the cost
21		analysis a bit and understand why else does it make sense? And ask
22		the question why? Why does this make sense? And I think that is

23	potentially more important to answer these questions. That's my first
24	point. My second point is that we are talking about people (chuckles)
25	in this uhm this discussion and those people are in this room and we
26	need a level of sensitivity about that as well ...

The questioning stance challenges the status quo and was at times received with resistance. In line 3, John displays resistance to Peter's initial repositioning of the proposed merger being discounted at this juncture. The first is a discursive resistance as Peter interrupts. John questions the interruption with a "sorry" and a pause. Peter begins to brush his thighs and continues do so until John's speaking turn comes to an end. Resistance emerged as a recurring pattern displayed in moments of conflict. These would at times hinder the participation as (unlike John) certain participants would refrain from presenting the questioning stance.

Furthermore, the act of displaying one's dissonance with a question could manifest in a physical display such as Peter rubbing his legs. At other times, participants in disagreement with the questioning stance would shake their head in disagreement during another's speaking turn. In all instances, this would lead to a temporary moment of tension, which would lead to the questioning stance being interrupted or even dismissed. In the example above, John continues, and his participation is not denied but only momentarily hindered.

In the questioning stance, the object of strategic attention is identified and then evaluated for its merit by asking all present if there are no other alternatives that the team should potentially consider and, if so, what might they be and how could they be beneficial to the strategizing process? At times, strategic debates, dialogues, and discussions among the participants would ensue and would ultimately resolve the issue or lead to the issue being postponed for further exploration.

At times, the questioning stance would propose the dismantling of the established positioning stance as a practice used to facilitate or create an enabling space for others to question the validity, integrity, or relevance of the positioning stance. John's disregarding of the repositioning stance, and asking that the merger be discussed, simultaneously presents a critical view of the validity of the positioning stance while

also questioning its existence, relevance, and validity. Whereas Peter repositions the stance initially established by Jim, John acknowledges the preceding stances, suggesting that the team should test the assumptions of the presentation as a possible strategic initiative.

The methods and material used to establish the positioning stance could be questioned and, as in the example above, they could also be disregarded by participants in order to question the stance previously taken on the strategic issue. In the example above, John does this by questioning the data used to establish the questioning stance, questioning the validity of the costing assumptions, and questioning the platform on which the positioning stances were presented. He suggests that the material should be further developed as it has consequences for those present in the meeting that may not be strategically beneficial.

Within the strategy workshops, there were predetermined and emergent strategic issues that people proposed within the strategy meeting as new strategic initiatives or amendments to existing ones. The presentation of a new initiative saw actors take different stances and postures in relation to the issue being discussed. It emerged in the data that people took various stances in relation to the strategic focal prominence within a strategy episode objects brought forth for the team to engage in as part of the test-and-adapt phase of the strategy process. From these, instances emerged where the stances taken on the strategic issue were ones that people fundamentally disagreed with.

A key aspect to strategic participation was how the disagreement was managed and more importantly, how these strategic issues were positioned as issues of strategical relevance. The positioning stance emerged as a practice used to propose a strategic stance, the repositioning stance emerged as a practice used to further build and develop the strategic initiative, and the questioning stance was a way in which participants negotiated the suspension of the ongoing strategic work to ask “why” this was the stance being taken and “if” there may be alternatives to this stance that the team may not have fully explored.

One of the ways in which the various stances were negotiated was through a practice I refer to as resolutioning. In the next section, I present this strategic practice as well as how embodied, material, and discursive resources were used to collectively enable participants to come to a resolved strategic outcome on the issues discussed during the away strategy meetings.

Stance taking emerged as a way of describing how social actors presented at away strategy meetings, negotiating participation and specific outcomes around issues of strategic attention. The findings show that this was achieved through three practices that largely emerged in succession of each other as they followed a particular pattern. The positioning stance offered the initial bracketing of the objective strategic attention: the "how" of engaging with that object and the potential strategic outcome desired for that object. The repositioning stance then took this apart and reconfigured the object of strategic attention: the "how" and the outcome. The third stance emerged as the questioning stance, which challenged the critical attention, and the narrowing of focus, that had been done in both of the preceding stances and offering instead reasons why both were, in different ways, inappropriate. Because the original validity of the positioning stance draws upon the forms of authority that validate that stance, a critical part of why the questioning stance is to question the validity and legitimacy of these forms of authority used to validate the initial positioning stance.

The episode presented in Excerpt 4.6, for example, cannot be understood by focusing solely on what was said but can also be understood through taking a dramaturgical analysis of the interaction, which reveals the multiple resources employed throughout. These resources include the reference made to the PowerPoint presentation through gestures, how different gazes were orientated toward different participants, the reference to those absent in the room, as well as the use of silence. These resources were "crucial to how participants … build action together" (Goodwin, 2003, p. 20). This will be examined in more detail below in the exemplar of a strategic episode that contains examples of how multimodal resources were used in the establishment of each the three stances that could be taken by participants in a typical strategy episode.

Stance taking emerged as a way to describe a phenomenon in the data where social actors present at an offsite strategy meeting negotiated the participation and particular

outcomes around issues of strategic attention. Stance taking is a form of participation that relates, basically, to how certain people position themselves vis-à-vis strategic issues under collective consideration. The findings show that this was achieved through three practices that largely emerged in succession of each other as they followed a pattern. The individuals who take a specific stance follow the embodied roles negotiated in the expositioning, that is, they present in the embodied roles as actors while others will be participating as the audience.

The first was the *positioning stance*, which offers the initial bracketing of the object of strategic attention, the "how" of engaging with that object, i.e. the strategic issue under consideration, and the potential strategic outcome desired for that object. The *repositioning stance* takes that apart and reconfigures the object of strategic attention and constitutes the "how" and the "what" of the strategic outcome. The third stance emerged as the *questioning stance*, which questions the critical attention given to the strategic issue and the narrowing of focus in both of the preceding stances and instead offers reasons to why both are, in different ways, potentially inappropriate. The original validity of the positioning stance draws upon the forms of authority that validate it, while the questioning stance questions the validity and legitimacy of the forms of authority in use, and so expands the scope of consideration.

4.8 Huddles: Negotiating Participation

Vignette 4.2 below provides a backdrop to examining huddles.

It is the second day of the three-day offsite strategy meeting. Ninety-four minutes prior to the emergence of the distancing huddle, there was a disagreement among AlphaDep members regarding the strategic initiative. Mandla, Thabile, and Zakhele (pseudonyms) agreed with each other regarding the proposed solution. They whispered the proposition, among themselves and later made it to the whole team, presented by Thabile. Following Thabile's presentation of the suggested strategic initiative, there were murmurs among the team members. Sipho (pseudonym), a senior member of the team, who has the highest technical knowledge of the product under review dismissed the strategic initiative proposed by the trio saying: "*Thabile,*

we could debate that (suggestion) ad infinitum. The fact is that none of our competitors are mitigating this threat in that way because your suggestion is an expensive approach to mitigating risk. I agree with Grant and Shaun (pseudonym) that what needs to be done is for us to educate stakeholders." Grant, the head of the department nods in agreement and resolves the matter by saying: "*The threat should actually be classified as a weakness and mitigated through educating the stakeholders.*" The trio disagrees with this suggestion and displays this by shaking their heads and then whispering between themselves. Portia reprimands the whispers saying that "the conversation would be much richer if shared with others". Portia then as if there are any further comments, to which no one response and then suggests that the team adopts the issue as a weakness. The team then goes on to discuss other matters related to the SWOT analysis.

Vignette 4.2

We join the meeting 94 minutes after the disagreement in Vignette 4.2 above took place (see Excerpt 4.8). Grant has just suggested that the team take a five-minute body break, after which they would begin to test and adapt their strategy map.

Excerpt 4.8. Code switching as a discursive resource (backstage discourse in the frontstage region).

1	Grant:	So, let's take a five-minute body break
2		(Stands up and looks at Brenda (pseudonym) who is still sitting
3		across from him)
4	Thabile:	Body break Brenda, a body break means you stand up and stretch
5		(she says while stretching)
6	Brenda:	I know, but I have already been (gestures to the door)
7		(Thabile switches and says in isiZulu)
8	Thabile:	Some of those sitting next to you are sleeping. Wake them up, they
9		are busy (she makes different sleeping expressions, both Brenda and
10		Thabile laugh as Mandla and Zakhele both arise from their chairs
11		tucking them in and moving toward Thabile.)

The first characteristic of this distancing huddle was that it was formed away from the preconfigured space to only include a self-selected subset of participants. The second form of distancing was in the language used when engaged in this form of a huddle. Code switching among bilinguals was a reoccurring pattern within meetings. Participants would use different languages to openly speak to each in backstage discourse. In line 7, Thabile openly speaks in isiZulu about members in the meetings who could hear her but not understand what she was saying. In this instance, however, Thabile uses code switching to jokingly comment on the limited level of participation engaged in by their fellow colleagues. The act exemplifies how the simultaneous use of backstage discourse was used in the frontstage region by bilinguals.

Excerpt 4.9 however, is an example of how code switching was used as a discursive resource, coupled with embodied and material resources, to establish a form of peripheral strategic participation, that was not only a form of backstage participation but a strategic negotiation of resources employed by participants in tandem to establish interpersonal and strategic alignment.

Excerpt 4.9. Establishing interpersonal and strategic alignment through a distancing huddle (backstage discourse in the frontstage region).

Figure 4.22

Figure 4.23

Figure 4.24

Figure 4.25

12		Mandla, Thabile and Zakhele are huddled together. Zakhele starts
13		the conversation speaking isiZulu to both participants.
14	Zakhele:	I don't know how best to convince these people about that
15		education issue. (he says this while pointing toward Shaun and the
16		rest of the room as seen in Figure 4.22). Educating stakeholders
17		won't solve the problem
18	Thabile:	Listen, I think you are being defensive (she says while placing her
19		hand on Zakhele's shoulder; Figure 4.23)
20	Zakhele:	The problem is that they don't understand how this affects us.
21	Thabile:	This was the point I was trying to make regarding the solution that
22		you suggested (she says pointing at him in Figure 4.24)

Speaking in a different language represents the intentional use of a different language as a resource to distance the conversation from the rest of the participants present in the room. It also symbolizes how participants would build an alternative form of participation in strategy-related discourse. Unlike with the first example of code switching, the linguistic and physical alteration created by coming into close

proximity with each other is an example of what I refer to as the establishment of strategy focused *distancing huddles*.

The third characteristic of a distancing huddle was the thematic content of the huddle. Distancing huddles were usually engaged in by participants to speak frankly about the object of strategic attention and enabled them to collectively express their frustration with the peripheral strategic participation as a space where they expressed their frustration and, at times, find a way to resolve this externally in order to establish their agency internally.

In lines 14–16, Zakhele openly expresses the frustration he has with his proposed initiative being dismissed during the discussion earlier in the day. Thabile responds in line 17 by presenting her assessment of Zakhele's participation while simultaneously touching his shoulder as a display of support. In lines 20–21, Thabile continues to make her point as she expresses how she tried to assist Zakhele within the meeting, to help him position his stance. Saying her entire dialogue in isiZulu, together with the gesture, was indicative of the personal nature of the distancing huddle and the heightened level of self-expression that participants would typically engage in when huddled together in this form of peripheral participation.

Huddles would usually occur between participants who knew each other well and had a professional and personal kinship with each other, and they were intentionally used in aid of serving a definite and clear understandable communicative end. In Excerpt 4.10 (a direct continuation of the conversation in Excerpt 4.9), the trio establish a huddle for strategic alignment and a form of collective strategic decision-making in the form of peripheral strategic participation.

Excerpt 4.10. Example of a distancing huddle (constructing a solution).		
22	Mandla:	(speaking in a lower tone of voice) This thing about educating the
23		customer, sometimes the stakeholders say customers are not
24		willing to *accept some of the [name of product]*.
25	Zakhele:	(nodding)
26	Mandla:	(speaking in a lower tone of voice) I had an experience with one
27		of the branches. When I got there, I was told that this product has
28		a fault and some customers were not willing to accept it. They
29		rejected it and no amount of education was going to make them
30		take the product. It should be an initiative (Thabile and Zakhele
31		nod)
32	Thabile:	Remember when we released the [name of product] and
33		customers would not accept it, we had educated the stakeholders,
34		but the customers didn't want it. We were lucky because we had
35		an alternative. But right now, if customers refuse to accept [name
36		of product] we are in serious trouble
37	Zakhele:	It's costly, it's a risk, and it's one that will cost us.

Unlike in central strategic participation, huddles emerged as a form of self-governed participation where self-expression was unfiltered. In line 22, Mandla expresses why he believes the strategic weakness should be reconsidered; however, unlike in the preconfigured participation, he goes on to offer anecdotal evidence to support his view and suggests that the threat be elevated to the level of a strategic initiative to address his concern and mitigate the risk posed by this issue.

The distancing huddles presented participants with an alternative space for open disclosure and self-expression. For example, unlike earlier in the meeting, where all members present participated in the discussion, the exclusivity of the distancing huddle enables Mandla to present an anecdote and propose a new strategic initiative. Due to the competition for speaking time in the central strategic participation, participants would at times censor themselves and reveal certain perspectives outside of the preconfigured participation. In the current example, Mandla shares an anecdote. In similar huddles, participants would openly express disagreement or emotions but not in the meeting.

The distancing huddles emerged as space that encouraged participants to brainstorm strategic decisions by establishing an alternative space and strategies to contribute to the strategic outcomes. We join the interaction in Excerpt 4.11 (a continuation of Excerpt 4.10) as three participants construct a strategic decision; they later present it to Grant for adoption when the team reconvenes.

Excerpt 4.11. Example of a distancing huddle (constructing a solution) contd.		
36	Zakhele:	Look, no amount of education will make unwilling customers
37		accept [name of product] product. We need a solution to this.
38	Thabile:	And I think he must understand (she points in the direction where
39		Grant is still seated)
40	Zakhele:	(nods)
41	Thabile:	We must systematically mitigate that risk (she says pointing to the
42		PowerPoint Presentation)
43	Mandla:	What you were saying (pointing to Zakhele) is ok, if it's a threat
44		or weakness or whatever then there should be a strategic objective
45		to solve it (gesturing an imaginary object with his hands as
46		Mandla nods)
47	Zakhele:	Exactly
48	Thabile:	And I agree we must explain this to Grant, (Thabile walks toward
49		Grant as she says) He needs to understand (she says walking away
50		and points toward Grant)

In line 36, Zakhele presents a case for the participants to resolve the issue. The suggestion Thabile presented on his behalf earlier in the meeting was not accepted and the participants now engage in an improvised form of strategizing. The distancing huddle now alters into an enabling space for participants to develop agency, through negotiating one's stance while also circumventing the hindrance of participation experienced within the central form of participation induced by the formal nature or excessive power that certain participants within the meeting displayed.

The first point of analytical significance is how participants collectively establish the object of strategic attention through the use of environmental gesture and discourse. In line 38, Thabile points to Grant identifying him as the target audience for the message they develop collectively. Her assertion does not consist of talk alone but also contains a pointing gesture that locates the specific person and issue at which the huddle should be aimed at. Thabile identifies Grant as the person to whom the suggested change should be presented if they are to get the strategic objective adopted.

Additionally, in line 41, Thabile identifies the object of strategic attention as she locates a specific issue on the PowerPoint presentation that they should address. For her, the strategic artefact, which is key to resolving the issue raised during the meeting, is converting what was referred to as a weakness in earlier deliberations into a strategic object on the strategy map. She knows that this would mean it would have to be accounted for in the strategy review and it will need a person assigned to it in the team. This will ensure that the risk repeatedly mentioned by Zakhele in line 35 is addressed in some manner even if it is not in the way that was suggested earlier in the meeting.

The change in language creates a confidential space that distances others. The bodily orientation toward each other enabled participants to engage in a mutually crafted form of strategizing that helped create a whole that is different from, and greater than, any of its constituents' part. Collectively, this is the distancing huddle. The collective use of embodied demonstration shown by Thabile concluded the strategy episodes, as the links to the strategy artefact, with the discussed strategic solution. By linking this collectively established strategic stance in the peripheries of strategic participation, Thabile suggests how they may link this solution back into central strategic participation. Thabile identifies a member of the team, who she believes to be the most influential member and the best person through which they may be able to get buy-in for their proposed strategic objective. This conclusion is built through embodied resources through the formation of an exclusive huddle, codeswitching, and gestures; it displays the multimodal package of complementary meaning enabled by the establishment of a distancing huddle.

Thabile ends up speaking to Grant and, when the meeting reconvenes, the strategic objective discussed in the distancing huddle is adopted. The episodes above

demonstrate the forming of an interactional constellation outside of the ongoing central form of participation. Collectively, peripheral strategic participation was engaged in as a form of interaction that was not public or meant to include all present. Typically, these peripheral conversations would include two or three participants. The participation framework was more involved as participants engaged in huddles prior to the start of meetings and during temporary breaks. These self-organized huddles were used by participants as alternative avenues through which one's participation in the central space could be negotiated.

4.8.1 Aligning the Distancing Huddle to Central Strategy Participation

Transitioning huddles enabled participants to negotiate different participatory roles in the peripheries of the meeting space in order to facilitate their participation in the central "stage" of the offsite strategy workshop. In Excerpt 4.12 below, the distancing huddle enabled participants to negotiate and alter the strategic outcome of the meeting. The link between the distancing huddle and the development of one's agency is embodied in the example below, from a conversation initiated by Thabile directed at Grant. Thabile approaches Grant as Trudy (pseudonym) walks toward Thabile. Trudy wants to talk to Thabile but before she can, Thabile begins her interaction with Grant.

Excerpt 4.12

Figure 4.26

Figure 4.27

1	Thabile:	Grant you know this issue of not having an alternative should
2		customers reject [name of product] and saying all we need to do
3		is educate the stakeholders is the only option? This not an option.
4		(Trudy rolls her eyes as she tilts her head while shifting her weight
5		from one foot to another. Trudy is about to speak but Thabile
6		touches her arm, which silences her (Figure 4.26). Thabile
7		continues to speak)
8	Thabile:	(points to the PowerPoint presentation; Figure 4.27) No amount
9		of education will get the client to use the product. This is what we
10		are saying. We can communicate but people won't use a product
11		they do not trust.

In the interaction above, Thabile shifts towards being inclusive in the huddle and uses this interaction as an opportunity to transition what was a distancing huddle into one that can influence the strategic outcome in the "stage" for central strategic participation. Whereas previously Thabile spoke in a different language and in a hushed voice to include only a subset of audience members, she now speaks in English and loud enough for everyone present to hear. When Trudy (who was in disagreement with the suggestion she had made regarding this strategy issue earlier) joins, Thabile is not adverse to this, but directs the interaction in a way that she could not do in the preconfigured strategic participation when she indicates who will have a speaking turn and not when she silences Trudy, as seen in Figure 4.26.

The act of driving the peripheral strategic participation differed from other forms of participation. First, there was a distinct transition in the role of participants engaged

in the huddle. In the interaction above, no efforts are made to keep the conversation private. When unexpected members of the team join the conversation, the huddle expands and becomes inclusive. As a result, Trudy joins the conversation and they openly discuss it together, making what was a private form of participation between Thabile and Grant now an inclusive, frontstage interaction made relevant to the strategizing goal of the entire team. Second, the patterns that reoccurred in the transitioning huddles involved having a clear protagonist, or put differently, a strategic theme carrier from the moment who drove the interaction with an intended strategic outcome.

This exemplary case of a transitioning huddle was chosen because of the immediate and seamless transition made from a backstage interaction to a frontstage interaction with the deliberate intention being to influence the outcome of the central strategic participation. In examples where the transitioning huddles were most effective, participants would find ways to present issues discussed in the transitioning huddle as points made available for consideration to all.

This is interesting given the efforts made during the distancing huddle which had just taken place and the efforts made to exclude those present. The fluidity of the space used for the meeting outside of the formal plenary session allowed participants to seamlessly move from backstage to frontstage interactions and construct influential interactions with key members of the team for the most effective strategic influence and outcome. This showed the potential and efficacy that peripheral forms of strategic participation had in offering participants agency, experienced by those engaged in the huddles to expedite and influence strategic outcomes in ways that preconfigured strategic participation did not:

> "After four minutes and thirty-six seconds of talking, Grant indicates that he has a better appreciation for the point Thabile and Mandla were trying to make. He maintains that the suggestion to create an alternative product would not be possible due to costs and the reason mentioned by Sipho. Thabile concedes to Grant's points of view and then suggests that there be a change made to the strategy map in the upcoming session as she points to the projected strategy map on the screen. By gesturing to the PowerPoint presentation (as seen in

> Figure 4.27), Thabile uses the projected strategy map to show Grant and Trudy what alterations would need to be made, asserting this by suggesting that "*improving awareness, education and insights from the stakeholders*", which was listed on the strategy map as part of the teams' Strategic Internal Process Objectives (Strategy Map, September 2016), be changed to an initiative as opposed to an objective as she points to the projected strategy map saying, "*It's out there it's not something internal that we can deliver as an internal value proposition*". Trudy agrees by saying that "*the initiative should be more internally focused"*. When Portia reconvenes the session, the strategic change suggested in the distancing huddle, endorsed by Grant, is adopted by the team. Thabile's interaction with Grant led to a change in the strategic objective being cascaded in the strategy map to the status of a strategy initiative.
>
> (Analytical memo SFA 3)

The interaction initially analysed in the distancing huddle as a private conversation later influenced the outcome of the strategic interaction in the preconfigured strategic participation as Thabile's engagement, with commitment to representing the views presented by Zakhele and Mandla to her, enabled her to present the various points raised during the distancing huddle as important points for Grant to consider in the transitioning huddle.

These huddles eventually led to Grant and Trudy aligning with the position taken during the transitioning huddle. When the meeting reconvened, the strategic objective was changed into a strategic initiative. The weakness in the SWOT analysis was changed into a threat; the team now agreed that customer resistance toward [name of product] is not an issue that could be resolved through education alone. However, not all distancing and transitioning huddles resulted in the desired outcome. Still, they did enable participants that had not spoken during the plenary session to speak. In certain instances, they led to a change in the direction of the conversation that was taking place in the central strategic participation. These were significant as they helped answer the research question and led to a better understanding of how embodied, material, and discursive resources continued to be employed by participants in improvised and unfacilitated parts of the offsite strategy meeting in several ways. The

efficacy of the huddle emerged in how it was then used to influence the strategizing process within the central strategy participation.

4.8 Resolutioning

In Excerpt 4.13, Grant (one of the head of departments) is about to present the adaptations suggested by his group to the SWOT analysis of the theme team. The groups consisted of different members from each department/ subsidiary and were asked to assess the theme teams existing SWOT analysis, so they may propose the changes that should be made to it for the new financial year. Grants team assessed and proposed adaptations to the "threats". We join the meeting as the old SWOT analysis is projected, the proposed changes are written on the white board and Portia, (a member of the SMO team) is seated at the Clive's laptop where she will edit to the old SWOT analysis based on the developing changes.

Excerpt 4.13		
945	Grant:	So, can I talk from here [sitting at his chair at the side of the
946		room] or do I need to come?
947	Clive:	Come into the spotlight [laughs]
948	Grant:	So, under threats - before there were "low barriers to entry"
949		and what we raised we debated for quite some time was that it
950		is "low barrier" to entry or is it about "technology"? We
951		weren't quite certain on how to phrase [pointing to the white
952		board] it but in essence, it's around the rapid pace at which
953		technology develops, which causes there to be a low barrier to
954		entry. But they [pointing to two points on the white board] are
955		all interlinked.
956		[Clive points to the screen and comment about the change that
957		had just been made to the SWOT by Portia]
958		So, it's about the issue over there [Portia, Clive and Grant look
969		at the screen with Grant orienting his body away from the
970		audience and toward the screen to see to what Clive is
971		pointing]
972		[Grant is oriented toward, and pointing to, the screen] There is

973		a debate about how to phrase it… the issue there is and…
974	Peter:	[Peter interrupts] You're absolutely right… we… maybe it's
975		about rewording… we will need help from all the wordsmiths
976		who are around the tables [some members laugh and pass
977		glances at each other] But it's not just about low barrier to [he
978		gestures to the screen then turns his gaze to Zakhele who is
979		sitting next to him, and an expert in this area] entry issue, it is
980		about how the technology is moving at such a rapid pace. If
981		technology is moving so rapidly... perhaps you need to
982		increase the risk of the concept and take that out [Peter points
982		to the screen from his seat at the back of the U-shaped tables]
983		Let's try entry and interlink it if that makes sense so that it's
984		not similar to that context over there [Clive, Peter and Grant
985		and some of the participants look at the screen while Portia
986		makes the edit that Peter has suggested]

In line 945, Grant asks if he could "talk from here" referring to where he is seated, as he had been nominated by his team members to present their suggested changes to the SWOT analysis to the rest of the team. Prior to Grant's presentation, no member of the audience apart from Clive (the head facilitator), Peter (the executive director responsible for the cluster) and Andrew (the head of risk) had participated in a speaker role. Audience members had mostly been asking questions in reaction to the narrative they were being taken through by the three previous speakers. Clive joked with Grant in Line 947, telling him to step into the spotlight, as well as with two subsequent speakers on what became the revolving stage. Members who engaged in practices related to the resolutioning as explained, got an opportunity to lead the performance of the strategy in novel ways by revolving from being audience members to transient protagonists.

The interactions which emerged on the resolutioning were moments wherein changes to a particular aspect of the strategy were made and such interactions happened at three points in each meeting. These points were: firstly, when the SWOT analysis was being revised; secondly, when the strategy map was being the strategy artefact in use; and finally, when the proposed initiatives were being tested. During these moments there

were extensive deliberations that transpired which contributed to the collective action of dynamism within the strategy performance. Thus, the resolutioning entailed a three-way mediation of the strategy through materials and a multidirectional dialogue among the participants. Figures 28 and 29 exemplify how the interactions in the resolutioning are multi-layered, and present how the enactment of the "adaptation" of the strategy was performed.

Figure 0.28. Example 1 of how the interactions in the resolutioning are multi-layered.

Figure 0.29. Example 2 of how the interactions in the resolutioning are entangled

Importantly, the act of resolutioning was unlike the other forms of strategic work of interaction because its focal point was not directed at a single individual or between two members and or strategy artefact. It played out as a combination of the other stages. Pointedly, the combination included the backstage where Portia was seated which linked to the frontstage region because the work on the computer was continuously projected while she was working on it for all to see which captured the edits being made to the document.

Also, the gazes and bodily orientations were multidirectional in instances where the participant stood in front of, or near, a strategy artefact such as the whiteboard. Most importantly the findings showed that when the participants engaged on the resolutioning, their roles shifted from being led by an individual to being performed as a collective through dialogic interactions. In that way, the role of a single speaker was clearly the discourse and embodied interaction was transient among all the participants as opposed to being fixed, as it happened during the initiation and termination phases of the meeting. Additionally, the audience members who took part in the resolutioning prominent during the conduct phase of the meeting whereby there was the enactment of what Hare and Blumberg (1988) refer to as a "new meaning". Such new meaning enabled audience members to shift toward being co-actors and collaborators in the process of strategy formulation.

Consequently, the resolutioning emerged an act where the adaptations of the strategy was the activity of focal prominence .Similar to writing a script the transformative action which included gesture, bodily orientation and discourse between participants served as an inciting incident for the transformation into a working proposition through the practice of "improvised adaptation" the "real" which was the existing strategy into the "ideal". It was a reformulated strategy co-created through three phases of interaction, firstly by being the "inciting incident" which was introduced by the facilitator through the use of strategy tools in the form of the PowerPoint presentation. In that way, it shifted interactions from being a monodrama performed by a single actor with a pre-text (Hare and Blumberg, 1988) into an improvised session where the props and the previous script were used to guide the unfolding co-creation of a new meaning. Essentially, it resulted in the reconstitution of the strategy scene being enacted.

Taken together, the action started when Grant pointed at the white board, which was followed by Clive pointing at the screen. Portia looked at the screen to where Clive was pointing and then made the adjustments to the SWOT analysis while listening to Clive and Grant. This kind of unplanned yet sequential interaction became what I referred to as the act of improvised adaptation the strategy. Another view to the process shows that the first action consisted of the inciting incident which included team members working with a strategy tool as the original version of the strategy. In Line 945 Grant points at the transitional version of the strategy and is neither the final one nor the new one whereas Clive's pointing is oriented toward the old strategy to which Portia had not made edits. Portia was oriented to the computer where she was capturing inputs to make the changes to the old strategy based on the contributions from the actors who were oriented toward the screen and the board as well as the actors oriented toward them.

Therefore, the improvised adaptation happens as each audience member contributes to the collaborated changes which brought forth the eventually developed new, or revised, strategy. Peter alluded to the different roles that the participants, who were engaged in the practice of improvised adaptation, embodied by implying that there were those who may play the role of the wordsmiths to ensure that the technical phrasing of the concepts was correct. Peter was highlighting the importance of appropriated conceptualisation of the entire process in that incorrectly stated words had potential to convey a completely different and unintended meaning. One such instance was when Peter himself offered an adaptation to the script when he suggested that "threats" should perhaps be referred to as "technology" as opposed to the notion of "low barriers". In that way, Peter's suggestion improvised the idea, originally framed by Grant and the team which in essence, steered the audience members to collectively engage as social actors that Boal (2011) refers to as simultaneous dramaturgy toward the desired strategy in practice outcomes. Such dramaturgy is further expanded by Boal in various forms of theatre toward enabling participants to enact the "rehearsal of one's desired future" through a series of interactive performances.

4.9 Summary

Based on the illustrative episodes of strategic participation presented in this chapter, I present my overall theory of strategic participation at FinCo in Chapter 5. This theory is informed by the concepts illustrated above as, in Chapter 5, I show the interrelationships between the concepts through the presentation of theoretical model.

CHAPTER 5: THEORIZING PARTICIPATION AT FINCO

5.1 Introduction

This chapter expands on the empirical findings presented in the previous chapter. My findings up to this point have shown that participation is a multi-faceted activity consisting of six activities which emerged during the course of strategy workshops. Each episode illustrated various ways in which senior managers at FinCo engaged in the practice of a strategy workshop over an extended period of time. In this chapter, I theorize how these activities were engaged in, in an interconnected manner, to derive two patterns of participation, namely *preconfigured* and *peripheral* participation. In each form of participation, I define the activities that underpin each form of participations, how they contribute towards our understanding of participation, and the mobilization of the material, discursive and embodied resources.

Preconfigured participation refers to a form of participation that is envisioned as formal and aimed at participant's collective enactment of strategic work. The three activities that underpinned preconfigured participation were: *expositioning*, *stance taking* and *resolutioning*. These three activities took place within the agenda as activities aimed at including all who were present in reaching a consensus on the adaptations that were to be made to the strategy. Peripheral participation consists of *pre-enactment interactions*, *affiliative groups* and *huddling*. These three activities emerged in instances where only a subset of participants engaged in interactions outside of the time allotted to the formal meeting activities. In certain instances, peripheral participation was engaged in when participants lacked agency or seemed marginalized during the preconfigured form of participation. Unlike preconfigured participation, peripheral participation was unfacilitated, comprising backstage rhetoric and was engaged in by a subset of participants, as opposed to all in attendance at the meeting.

Identifying the two patterns of participation as well as the concepts that underpin them offers us analytical tools to understand the mechanisms that contribute towards participation. Having these analytical tools and being able to use them to understand participation was, however, not the primary finding of this study. What emerged as being especially significant in the study is that these two patterns of participation *worked together* and were *both necessary* in enabling participation. This was because not all who were in attendance at the strategy workshop had the same abilities to participate within the meeting, but instead differential patterns of access to participation were used to influence strategic outcomes. What the findings illustrate is that in instances where the switch from a preconfigured form of participation to a peripheral form of participation, this was achieved through the use of discursive, material and embodied resources. The use of discursive, material and embodied resources was also applied when participants engaged in both forms of participation, i.e. preconfigured and peripheral, simultaneously. I refer to the use of these resources to shift between these two forms of participation as *improvised adaptations*.

To illustrate how dynamic progression of two forms of participation unfolded over time, I developed the model presented in Figure 5.1. In this model, I situate the six concepts (i.e. six-second order themes) that emerged from the findings. These are (a) pre-enactment interactions (context building), (b) expositioning (co-production of meaning), (c) affiliative groups (in-meeting participant differentiation), (d) stance taking (enactment of testing the strategy), (e) huddles (external negotiation of agency-building action), and (f) resolutioning (enactment of making adaptations to the strategy). In section 5.2, I explain that the three concepts that contributed to the formation of preconfigured participation were linked as each contributed toward the establishment of the concept that followed in a sequential manner. Preconfigured participation is shown with the shaded rectangles.

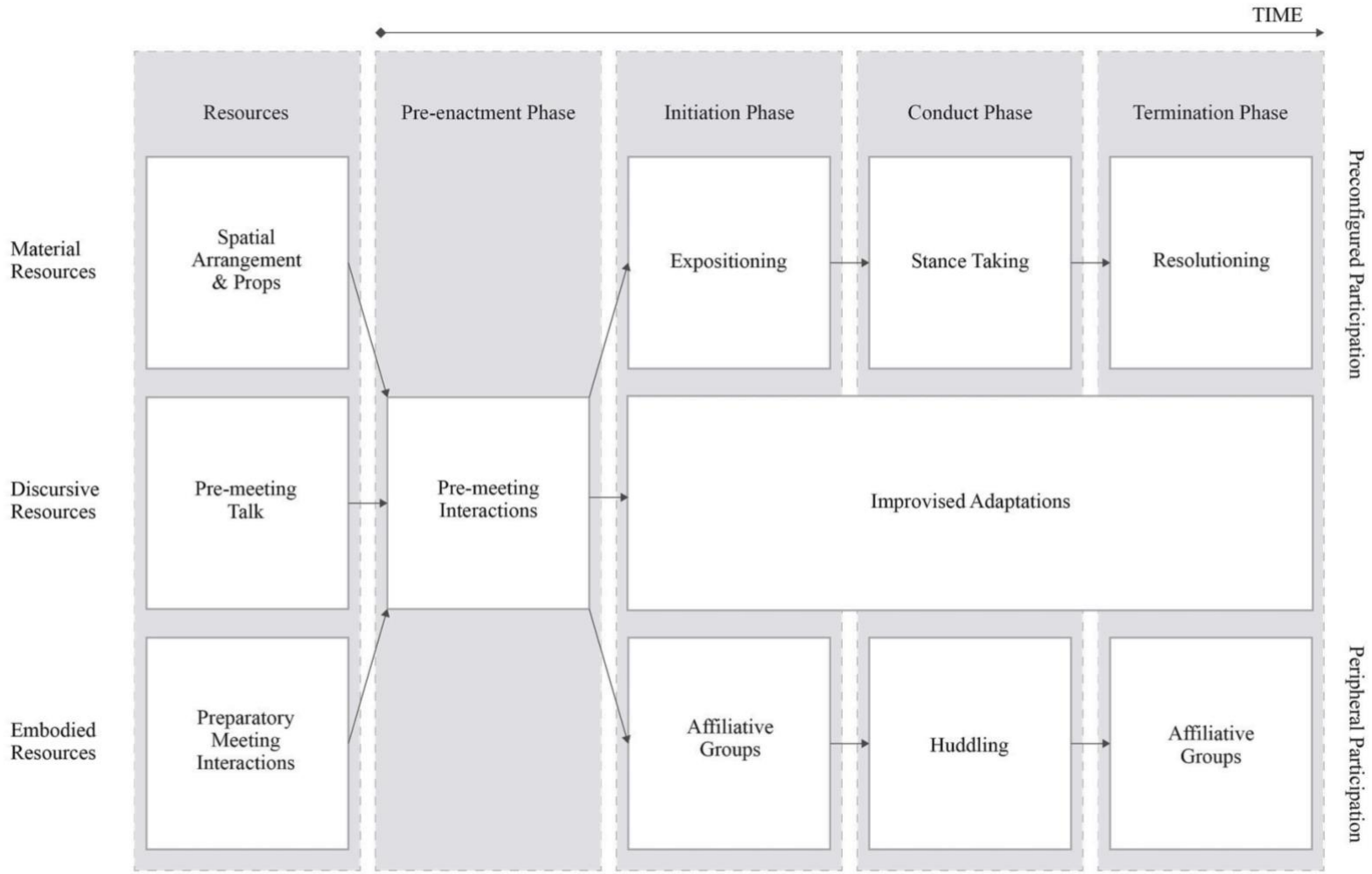

Figure 5.3. A temporal representation of the emergence of the activities in phases.

Accordingly, beginning from the left: The three resources, were present from the time the first person arrived at the away strategy meeting. As presented in in Vignette 4.1 in the previous chapter, all three resources contributed in building the context for participation. The 'set the stage' (Hare and Blumberg, 1988) for the pre-meeting interactions. This was later consequential to the strategic outcome as it was the phase in the meeting were the emergence of affiliative groups began emerging. Expositioning was the first activity that contributed toward the establishment of a collectivized form of participation. Expositioning established how actors and audience members began engaging in the coproduction of meaning, through monologues and dialogic interactions. Expositioning was prevalent in the initiation phase of the meeting. This activity was followed by stance taking, which was how the strategy was tested. Different stances emerged as ways in which participants negotiated the changes that could be made to the strategy. In instances where a strategic consensus was reached, the strategy was adapted as the participants engaged in the act of resolutioning. This was based on discussing what the changes to the strategy should be, editing the speech into text, and concluding the process by testing and adapting the strategic issue of prominence. This initial pattern of participation alone, however, does not offer us an analytical appreciation of the envisioned form of participation, i.e. one that is inclusive and meant to enable all present to contribute collectively to the strategizing process.

Unlike in preconfigured participation, peripheral participation as represented by the second line of activities lines in Figure 5.1 was less sequential as seen in the re-emergence of affiliative groups in the termination phase. These emerged as participants engaged in whispers, code switching and interactions among sub groups within the meeting. These concepts emerged intermittently throughout the meeting. In section 5.3, I present each of the three concepts that contributed to peripheral forms of participations and examples from the data to illustrate their emergence. In section 5.4, I present a model that represents the dynamic relationship between the two patterns of participation and the interrelationship between the two forms of participation. Together, they show how participants were able to influence strategic outcomes through improvised adaptations as a result of the use of different resources in self-instigated ways.

5.2 Preconfigured Participation

The three types of preconfigured participation (expositioning, stance taking, and resolutioning) discussed in this section are presented in Figure 5.2.

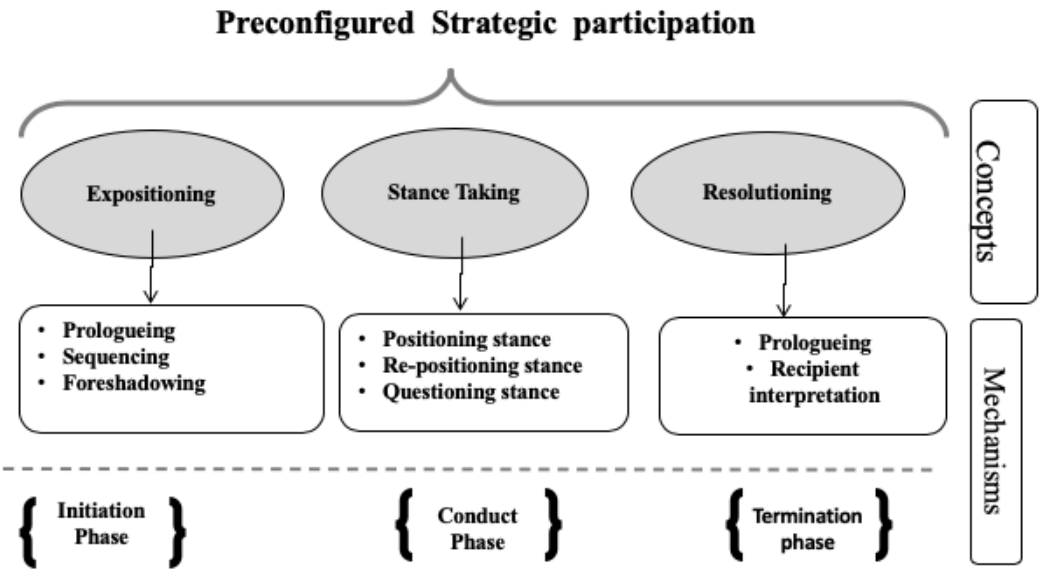

Figure 5.2. The three types of preconfigured participation (expositioning, stance taking, and resolutioning).

5.2.1 Expositioning

Exposition is a term used in literature, film, teaching and theatre as a part of a narrative that "explains where events take place, when happened before the story begins, and the background of the characters" (dictionary.cambridge.org). At FinCo, the first 60–90 minutes of the strategy workshops were dedicated to an activity I referred to as the expositioning of the strategy. Similar to theatre, the background story that was presented (expositioned) was the overarching strategy process. The expositioning of the strategy process offered audience members a summary of the strategic activity that had taken place thus far within FinCo. Due to the participatory nature of the meetings, the findings revealed that expositioning consisted of two categories, namely monologues and dialogic interactions, which together formed the theme I termed expositioning.

Expositioning served as the first preconfigured activity engaged in at the away strategy meetings. This activity served as the first official enactment of the strategy work as it included all participants present. Participants in the role of actors were required to make a presentation to the team. The expositioning of the strategy served as a starting point in the engagement of preconfigured patterns of participation and a practice engaged in to orientate participants toward three levels of awareness: the first being a micro level (as a team), the second being a meso level (as members of an organization) and the third being a macro level (in relation to the sector in which FinCo operates). The prepared monologues helped actors cascade the strategic decisions made across the organization and, in other instances, also helped give participants gain a better appreciation of the strategy from the perspective of a subject matter expert.

The findings show that expositioning was an activity that collectivized the audience and initiated the act of co-producing meaning between actors and audience members. This activity also enabled participants to gain a collective understanding and appreciation of the strategy process, new strategic initiatives, the delay in the current initiatives, and also allowed all present to contribute towards understanding what may be hindering the implementation of these strategic initiatives. The findings show that this activity within the meeting enabled participants to engage in dialogic interactions which converted backstage rhetoric into frontstage rhetoric.

Monologues were activities performed by actors with pre-allocated speaking turns. The actors were qualified by their achieved status within the organization and each contributed to narrating the backstory of the strategy in different but complementary ways. An example is an ExCom/ head of department leading the SFA, such as Peter in Episode 2, offering an expositioning monologue that followed an inductive structure (Waterhouse, 2001) and was aimed at team building. The summation of Peter's views on the strategy process offered the team a selection of anecdotes related to the strategy process aimed at orientating the audience towards hindrances to the strategy. As such, the collective role participants would play over the three days was to help find solutions to the challenges caused by delays in decision-making processes. Similar to Peter, members of the ExCom would perform these monologues, standing with their body orientated toward all who were present in an inclusive manner. To support their embodied orientation toward the audience, the thematic content of the

monologues from other ExCom members included metaphors, with a journey being the most prevalent metaphor which worked in aid of orientating the team toward this single metaphor. A second monologue was the one presented by the facilitators.

Unlike ExComs and head of departments, the facilitators' monologues were standardized, script-based monologues used in all meetings by all SMO members facilitating a workshop. Their expositioning monologues followed a sequential structure (Waterhouse, 2001) in that they offered a summation of the strategy process and thus giving the audience an opportunity to access to the strategy process thus far. These monologues depended on PowerPoint presentations as they were a type of plot-like script that had canonized the strategy process thus far and cascaded the decisions made and hindrances to implementation. Matthew was the expert tasked with presenting a sectorial overview of issues of significance to FinCo's strategy that the participants needed to be aware of as they embarked on testing the strategy. These monologues were performed by participants who had access to backstage rhetoric due to their level of authority and access to the overarching strategy process or their area of speciality. The access they had to the backstage rhetoric afforded to them by their role in the organization, meant that they were able to present what was backstage rhetoric in the meeting, making it frontstage rhetoric and thus leading to the coproduction of meaning among all who were present at the meeting. The third type of monologue was delivered by subject matter experts who focused on the macro level which linked the activities taking place at the strategy workshop to the sector-related issues that participants needed to consider during the strategy workshop as they may affect and influence FinCo. These three types of monologue were the first way in which the coproduction of meaning was achieved through what I referred to as expositioning.

The second was the dialogic interactions that emerged as a form on activity engaged in collectively to give all present an appreciation of the strategy from different micro and meso perspectives of the varying strategic activities taking place within the organization.

Similar to monologues, dialogic interactions led to the coproduction of meaning among participants at the micro level (as representatives of different department/

subsidiaries). The meso level, as representative of different SMT-level strategic activities that had taken place across the SFAs and the ExCom level, Peter was able to present how some of the decisions made at a meeting only attended by members of the ExCom were reached and the implications they had for the organization. This was evident with the decision to agree on the leadership program across the organization, and the intentional decision behind not referring to it as a strategic leadership program but rather as the leadership program.

Similar to monologues, dialogic interactions led to backstage rhetoric transforming into frontstage rhetoric in which participants coproduced meaning. An example of this was evident in Episode 2 when a subject matter expert (who was not sitting among the audience members) was able to give an account of the process his department had followed in the delivery of the EIM system. Briefly, there had been a delay in the implementation of the strategy initiative because of the decision-making process before it was adopted by business units within the bank. Peter's monologue regarding the delay in decision-making as a culture within the organization was exemplified in a strategic initiative. Expositioning here was necessary and useful as aspects of the strategy had been backstage rhetoric that only some members of the organization had access to. What the findings show is that the narration of the strategy process served as a way of cascading the ongoing strategic activity across the organization. It offered audience members a platform thorough which they could seek clarity on how their strategy aligned with the rest of FinCo. The misunderstanding that the department head had regarding why there was a delay was clarified and resulted in an agreement to address how departments should adopt the systems as part of their departmental strategy.

During and following the delivery of a monologue, audience members were able to contribute toward the exposition by making contributions to the monologue during a sharing of backstage rhetoric through dialogic interactions. Collectively, expositioning contributed to the coproduction of meaning among different members of the team. The representatives from the different departments speculated as to why there were hindrances to the implementation of cross-cutting strategic initiatives, gesturing towards each other thus indicating audience interaction among themselves through gazes and gestures. Members of the audience who were in more senior

positions offered backstage rhetoric to which representatives from the departments did not have access: thus clarifying some assumptions by making backstage rhetoric frontstage rhetoric. The executive members present were able to give a higher-level explanation of the strategic limitations as they were present during the decision-making, as exemplified by Peter's account of why it was decided the organization needed the strategic leadership program. He was even able to give nuanced details as to why the term strategic was omitted from the name of the program, thus intended to facilitate a better understanding and appreciation of the backstory of the strategic initiative.

Expositioning was a recurring activity within the meeting as various subject matter experts performed monologues to offer audience members background information regarding the latest developments in areas of their speciality. Expositioning was also enacted prior to participants engaging in the act of testing a strategic issue, as different actors would be asked to present cross-cutting strategic initiatives that participants needed to know about. Such enactment enabled participants' understanding of how the strategic initiative would affect their respective cluster, department or subsidiary. Expositioning at the start of the meeting orientated participants to the strategy process and strategy-related work that had taken place prior to the start of the meeting as it gave a retrospective review of the strategy process that had been engaged in to coproduce meaning, which resulted in a better understanding among participants. Where expositioning emerged later in the meeting, it was employed as a way of setting up the strategic issues of focus, leading to stance taking (detailed in section 5.2.2). Through the monologues and dialogic interactions, participants were able to make amendments to their strategy so that it aligned with cross-cutting strategic initiatives, but it also enabled the subject matter experts to understand and appreciate the needs of the different clusters, departments, and subsidiaries so they could adapt their strategy to meet their needs.

What the findings show is that the dialogic interactions among participants thematically differentiated participants according to their achieved status within the organization. The limited access participants had to backstage rhetoric influenced their equally limited interpretation of the strategy thus far. Following the monologues which cascaded the strategy and dialogic interactions, which facilitated the

coproduction of meaning, audience members were now in a better position to appreciate and understand the overarching strategy process. They were invited to contribute to testing the strategy now knowing what they initially did not know about how the various streams of activity had taken place across the organization. For example in Episode 1, members from different departments shared the view that cross-cutting initiatives at an SFA level were failing because departments and subsidiaries prioritized their strategy over that of the bank, as this took first priority. The senior managers responsible for departments that had cross-cutting roles in the implementation of the strategy presented the complex nature of the strategy at an SFA level and shared details of other SFAs' struggles due to a lack of regular meetings and communications across FinCo. Peter, the only executive present in the meeting, was able to present an overview of the strategic perspective of the highest decision-making body within FinCo. As one of six members of the ExCom, he (together with SMO team) could offer a view of all three levels of the strategy process as they were privy to the whole strategy process.

5.2.2 Stance Taking

Stance taking was an activity engaged in when testing the existing strategy. Following the expositioning, the participants had a better appreciation of the strategy and how they would be contributing to its development in relation to the overarching process. The findings show that the accomplishment of testing the strategy was engaged in through the stances taken by participants within the meeting. The three stances identified in the findings are the *positioning stance*, the *re-propositioning stance* and the *questioning stance*.

The *positioning stance* was an activity engaged in when initiating the act of testing the strategy. The participant embodying the positioning stance would emerge as the actor who defined the object of strategic activity around which other participants were meant to be organized. The positioning stance contributed to the presentation of proposed amendments to the existing strategy. Two forms of strategic changes were presented in the positioning stance. The positioning stance was established within the interaction through the use of materials in the form of strategy artefacts projected on the screen or, at times, the content contained in the strategy review pack. The findings

show that the positioning stance was employed by an actor to orientate the audience members either to: (1) establish the strategic object of attention, (2) present an alternative approach to achieving the strategic objective, (3) suggest a new strategic outcome, or (4) propose a refinement of the wording of the current strategy. Once the propositioned change to the strategy had been presented, those sitting in the audience would begin negotiating the strategic issue.

One way in which audience members would negotiate their participation was through a second stance, the *repositioning stance*. As a response to the proposition made in the positioning stance, the repositioning stance emerged as a counter stance to the one initially presented in the positioning stance. The repositioning stance orientated participants towards alternative ways of viewing and approaching the strategic objective identified in the positioning stance. The findings show that gestures and gazes were used to orientate those present to an alternative strategic issue of attention. Because the repositioning stance was one engaged in by audience members who did not have access to the material resources used by the actors in the episode, they relied on embodied interactions such as gazes, gestures and frontstage rhetoric to reposition the issues of focal prominence.

The third emergent stance from the findings was the *questioning stance*. This stance emerged in the data in instances where the positioning and repositioning stance were opened up to further questioning and scrutiny for their strategic validity and relevance in relation to the aims and objectives of the strategy. During the enactment of the questioning stance, each of the previously proposed strategic objectives identified in the two previous stances were held up to question in relation to the strategic objectives. In the questioning stance, the object of strategic attention was identified and then evaluated for its merit by asking all present if there were no other alternatives that the team should potentially consider and, if so, what might they be and how they may then be beneficial to the strategizing process. In instances where the questioning stance was engaged in, bodily orientation directed toward fellow audience members was the prominent form of bodily orientation. What emerged as being significant here was the absence of the material as an authenticating material upon which the stance was established as the focus was turned towards the audience member(s) and their views.

These three stances emerged in a recurring pattern across different workshops where the positioning stance was followed by the repositioning stance, and the repositioning stance either led to a form of resolutioning or was followed by a questioning stance. In some instances where the questioning stance did not lead either to a repositioning stance or resolutioning due to a disagreement, the issue was temporarily suspended or resolved by the most senior member present through the adoption of their view on what the outcome should be. Resolutioning was the activity that followed on from the repositioning stance as participants moved toward resolving the strategic issue.

However, there were instances where misalignment emerged as a subset of audience members were dissatisfied by this outcome. It was emergent in the findings that participants continued to discuss the issues away from the ongoing preconfigured meetings. They opted to engage in a peripheral form of participation that took place within meetings through in-meeting affiliative groups or out-of-meeting huddles. Both patterns of participation were independent forms of strategic interaction that emerged among a subset of participants and were ephemeral in nature. I discuss the effects of these patterns of participation in greater detail in section 5.3.

5.2.3 Resolutioning

The primary aim of the strategy workshop was reviewing the strategy-related work done at FinCo since the launch of the strategy six months prior. A critical aspect to the success of the strategy workshop was the process of testing and adapting the newly launched strategy. While stance taking emerged as the primary activity engaged in to test the strategy, resolutioning emerged as an outcome to stance taking. Resolutioning was identified as the point in the meeting when participants reached consensus on the strategic change that should be made, thus bringing the strategic issue of attention to closure.

My findings show that resolutioning consisted of two subthemes. The first was the act of prologueing, which, similar to expositioning, consisted of dialogic interactions. However, unlike expositioning, the thematic content of the dialogic interaction was aimed at concluding a strategic issue as opposed to introducing and orientating participants. The second aspect of resolutioning was cartography, which was the act

of making changes to the PowerPoint presentation as a way of recording the change(s) made and the conclusion reached by the participants. As such, I define resolutioning as the act of concluding the ongoing interaction pertaining to the object of strategic attention by achieving an agreement on what the strategic outcome should be. Following the opening up of the space around the strategic object under review through stance taking, a participant or the facilitator would present the proposed change to the strategy in the form of a prologue, which would then be followed by an adaptation to the PowerPoint presentation in instances where a consensus was reached.

Prologueing began as a separate act of stance taking as participants would discursively indicate the proposed change that should be made to the strategy. Cartography would then follow as the facilitator acknowledged this change, awaited amendments or oppositions to the proposed change. If there were none, the enactment of cartography would then begin as the written adaptations would be made to the strategy.

Resolutioning and cartography were used simultaneously and informed each other as participants either engaged in the act of prologueing or one which aligned with a collaborative practice, as identified by Kaplan (2011). Thus, the PowerPoint presentation was used as a material resource that enabled the practice of cartography. This would result in the change to the strategy which would be documented in the PowerPoint presentation to signify the team reaching consensus on the strategic issue. What the findings further reveal is that the act of engaging in cartography was one that not only resulted in the edits made to the PowerPoint but also consisted of simultaneous frontstage and backstage rhetoric and activities. It thus displayed that certain strategic outcomes were enabled by interactions participated in by a subset of participants within the meeting. Whereas prologueing included all members present in a frontstage from of interaction, some strategic activities related to the edits made to the strategy. These involved multiple actors and resources to help expedite the process of editing the strategy through backstage interactions which were later presented in the frontstage region. In addition to this finding, the data shows that some patterns of resolutioning emerged during pre-enactment activities in that certain patterns or pre-meeting talk led to the exclusion of strategic artefacts and edits to the PowerPoint presentation, which hindered certain issues of strategic attention being brought into a preconfigured form of participation. Also, the act of prologueing was

not one that always took place among all participants, as seen in the episode of huddling illustrated in section?? Figure?? of this thesis. The participants collectively engaged in a form of prologueing as they discussed the proposed change to the strategy among themselves, then presented it as a re-positioning stance within the meeting. Which was then, subsequently adopted by the team as an addition to the new adapted strategy as a new strategic initiative. An example of this can be seen in Episode 14, where members of NdaloCo were presenting a new mobile application they had been developing unbeknownst to AlphaDep, who were in the ideation phase of their application. NdaloCo's strategic initiative was reconfigured as one adopted for implementation across FinCo as opposed to it being a subsidiary level imitative.

While I have presented the activities through the presentation of a timeline, their emergence (as seen throughout in resolutioning, huddling and pre-enactment activities) was not linear in practice. In Figure 5.3, I present the dynamism and interrelationships that exist between the relationships.

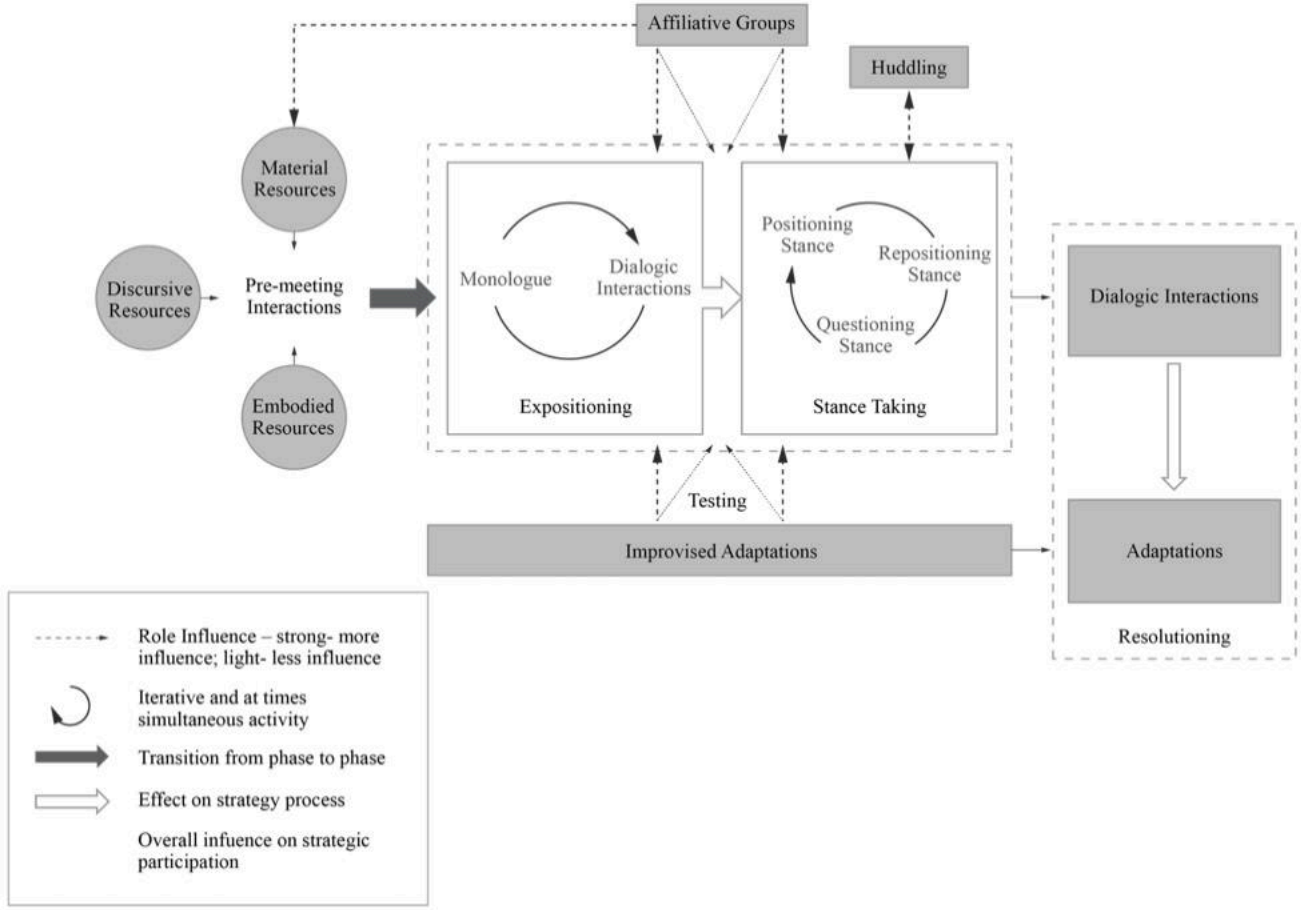

Figure 5.3. Theoretical model of dynamic participation process at FinCo.

Preconfigured strategic participation in the study is defined as a form of participation that is unified. It was a form of participation envisioned as one that would include those who were present in the meeting and was facilitated with the intention of creating a single strategic object of attention. This form of participation consisted of expositioning, stance taking, and resolutioning. Expositioning consisted of monologues that were in the agenda and shared for the benefit of all present. Dialogic interactions were incited by the content presented in the monologues and enabled participants to collectively share their views on the strategy. This resulted in the coproduction of meaning among participants as set up the foundation on which the rest of the workshop was based. The testing phase of the meeting was aimed at collectively asking if the strategy was still fit for purpose or it should be adapted. How this was accomplished was through the enactment of what I refer to as stance taking. The activity of resolutioning was also one available and to all present, as the facilitators opened the speaking floor to all for their proposed amendment(s) to the strategy and each person present was invited to contribute to the proposed changes. These three activities were present within all meetings and represented the primary mode of participation utilized to facilitate a collective use of material resources as the PowerPoint presentation was available to all and the speaking floor was envisioned as a space where all who were present were free to contribute toward the ongoing strategy work.

Preconfigured participation is shown with the shaded rectangles. As explained earlier in this chapter, this begins on the left, with expositioning, which was the first activity that contributed toward the establishment of a collectivized form of participation. Expositioning established how actors and audience members began engaging in the coproduction of meaning through monologues and dialogic interactions. This activity was followed by stance taking which was how the strategy was tested. Different stances emerged as ways in which participants negotiated the changes that could be made to the strategy. In instances where a strategic consensus was reached, the strategy was adapted as the participants engaged in the act of resolutioning. This was based on discussing what the changes to the strategy should be, editing the speech into text, and concluding the process by testing and adapting the strategic issue of prominence. This initial pattern of participation alone, however, does not offer us an

analytical appreciation of the envisioned form of participation, i.e. one that is inclusive and meant to enable all present to contribute collectively to the strategizing process.

What emerged is being especially significant is that this second set of activities was present in how participation was negotiated. From the start of the participants arriving in the meeting space, it emerged that not all who were in attendance of the strategy workshop had the same abilities to frame, contribute and participate within the meeting in the envisioned way. Instead, differential patterns of access to participation were used to influence strategic outcomes. The less sequential emergence of these peripheral forms of activity emerged throughout the meeting and only included a subset of participants. These activities included the remaining activities shown in clear ovals. Unlike the rectangles, these activities are connected by dotted line arrows which indicate where they emerged within the meeting.

Unlike the activities contained in the preconfigured form of participation, these activities did not follow a linear pattern. They were engaged in by a subset of participants and thus, activities not included in the agenda emerged throughout the meeting. In the model, moving from left to right, pre-meeting interactions emerged prior to the start of the meeting. They emerged again during the meetings people engaged in, involving whispers and code switching, as was seen with affiliative groups and during periods of recess where official strategic interactions were suspended. Strategy work continued among subsets of participants in the form of huddles as participants found ways to reposition their stance with regard to strategy issues, as seen with Episode x or in the in the example contained in the data table in which the executive responsible for SFA 2 suspended the meeting to resolve an argument that ensued between him and the SMO team regarding the inclusion of a SWOT analysis in the strategy workshop.

5.3 Peripheral Participation

The three types of peripheral participation (pre-enactment interactions, affiliative groups, and huddling) discussed in this section are presented in Figure 5.4.

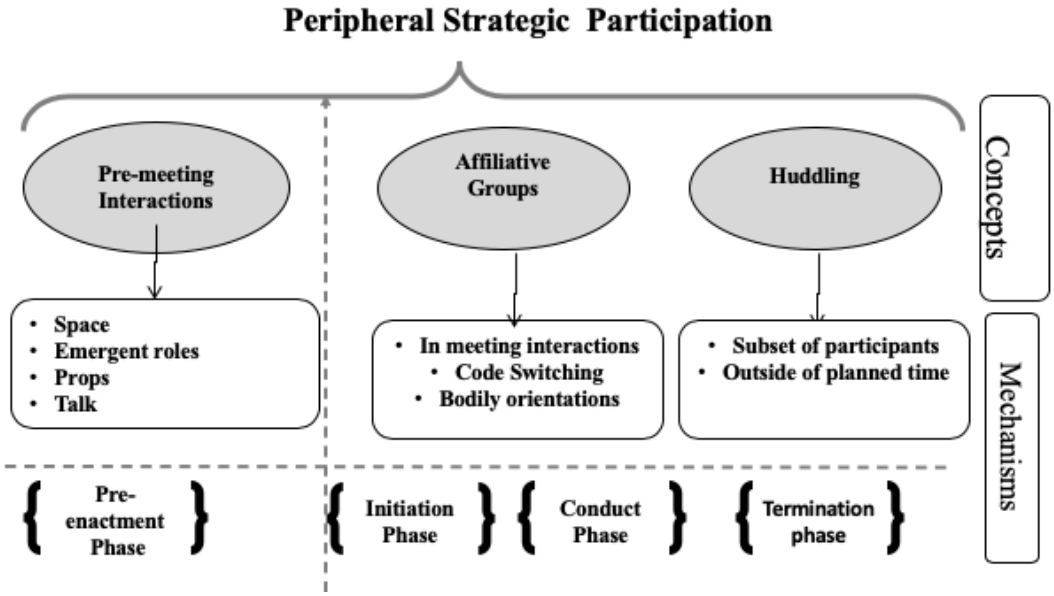

Figure 5.4. The three types of peripheral participation (pre-enactment interactions, affiliative groups, and huddling).

This form of participation took place in the absence of an audience where self-expression was unfiltered. Peripheral participation consisted of pre-meeting interactions, affiliations and huddles. Whereas preconfigured participation is frontstage participation, peripheral participation can be considered backstage interaction. This form of participation emerged as a practice that participants engaged in temporarily to delineate their strategic stance within the meeting. In the following sub-sections, each of the three activities that emerged are described in detail. The first activity found in a peripheral form of participation was pre-enactment interaction.

5.3.1 Pre-enactment Interactions

Pre-enactment interactions included verbal and non-verbal interactions among the participants, how they engaged with each other as well as the built environment in which the meeting was to take place. This phase of the meeting began when the first person arrived and ended at the start of the meeting as scheduled. Pre-enactment interactions consisted of two sub-themes: *participant differentiation* and *pre-meeting preparatory talk*. In Figure 5.1, it is linked to expositioning as the decisions made by participants prior to the start of the meeting, later influenced the type of micro-interaction that took place among them. These will be discussed later in section 5.3.2

(affiliative groups). The first emergent activity that took place during pre-enactment was the emergence of audience (or participant) differentiation.

Participant differentiation consisted of activities orientated toward participants' interpretation of the space and how they positioned themselves within the space as the first interpretative activity. This was indicative of the participatory role they anticipated playing within the away strategy meeting. The space was preconfigured as a space that had material resources that differentiated actors and audience members. Actors had material resources indicative of their role of an actor hence these materials were instrumental for navigating the away strategy meetings. These strategy-related materials were placed where the actors would need to be seated and included a copy of the Red Book, a laptop, audio speakers, FinCo's strategy and the clicker. Audience members were positioned towards co-authoring the strategy and had access to different materials to enable this. Their materials included a notebook, a pen and refreshments. My findings illustrate that a further differentiation among participants was prevalent in the away strategy meetings. This differentiation was evident in where participants chose to sit i.e. according to the clusters of affiliative groups based on pre-existing relationships. The first form of affiliative groups, based on pre-existing affiliations, was influenced by participants' achieved status within the organization and/ or their ascribed role.

The findings show that within the audience, there were forms of differentiation as senior members of the team sat in close proximity with each other and members from different departments/ subsidiaries sat next to each other. In instances where people sat in affiliations based on their ascribed roles, they were inclined to sit next to members of the team who spoke the same language as they did, or with whom they had close personal affiliations. An example of this was seen in the data as participants sat next to people who spoke the same language as them, allowing them to engage in codeswitching, nonverbal forms of gesture, as well as passing notes between them. An example of this was evident in Episode 3 as Zakhele, Thabile and Mandla changed the language they spoke among themselves. In instances where codeswitching took place within meetings, participants spoke in one of four out of the total of 11 South Africa's official languages. In instances where codeswitching was prevalent, participants sat next to people who spoke the same second language as them.

A second form of pre-enactment activity engaged in by participants prior to the strategy meetings was various patterns of *pre-meeting preparatory talk* and my findings show that participants engaged in different types of such pre-meeting talk. While members in the role of actor engaged predominantly in talk related to the outcome of the meeting, audience members engaged in small talk which was indicative of their interpersonal relationships and professional affiliations. For example, in Episode 12 Frank uses the pre-enactment activity to establish the envisioned form of participation he would like participants to have. He does this by banning the use of electronic devices and asking that members use note pads and the strategy review pack instead thus, permitting only members of the SMO team to use devices during the strategy process. According to Frank, the use of laptops was a hindrance to participation, which led him to establish the rules of engagement prior to the start of the meeting by banning the use of electronic devices.

Pre-enactment interactions encompassed a cluster of activities that had implications for the outcome of the meeting prior to its start. The first outcome delineated where participants positioned themselves within the space through the selection of affiliative groups. The second outcome was achieved by the pre-meeting talk engaged in prior to the start of the meeting, which influenced the inclusion and exclusion of strategic artefacts and issues of strategic significance. These influences hindered certain patterns of participation. The pre-enactment interactions came to an end at the start of the meeting as most participants orientated themselves to a single point of attention (Goffman, 1961).

5.3.2 Affiliative Groups

Affiliative groups are interactions that take place within the meeting among a subset of participants within the meeting. These were identified through where people sat, in relation to each other, and the types of strategy-focused interactions they were able to engage in due to being in close proximity with each other. The findings show that two patterns of affiliative groups emerged during participation within away strategy meetings. The first type of affiliative group to emerge in the meeting was based on institutional affiliations as members of the same department, subsidiary or rank within the organization sat next to each other. Due to this, as well as the support roles they

would be playing within the meeting, they sat next to each other and engaged in backstage rhetoric among themselves throughout the course of the meeting. Similarly, audience members grouped themselves in affiliative groups. Discursively, this was done through codeswitching, whispers and shared knowledge of backstage rhetoric. Through embodied participation, audience members oriented themselves within the meeting in affiliative groups by sitting next to people with whom they had personal affiliations, in accordance to their ascribed roles (Goffman, 1959), or in accordance to their achieved status (*ibid*). What the findings show is that in instances where participants shared one of these patterns of affiliation, the outcome allowed a collective form of participating in peripheries of the meeting as a subset of participants through backstage rhetoric. This would later lead to a collective presentation of strategy-related issues to the rest of the participants present i.e. those who were engaged in the affiliative groups thus presenting united perspectives.

Participants engaged in affiliative groups shared similar interpretations of the strategy which led to them engage with strategic issues collaboratively through shared stances on certain strategic issues. Where there were (dis)agreements or a lack of agency, the members of affiliative groups would use a different language to deliberate ways in which they could better present their perspective to the rest of the team. The findings show that affiliative groups were one way in which participants co-produced meaning among a subset of participants within the meeting. These groups were also engaged in the use of temporary spaces within the meeting which led to the deliberation or collective decision-making pertaining to the stance participants took in relation to the issue of strategic attention.

5.3.3 Huddling

Huddling is an activity engaged in by a subset of participants during meeting breaks. This activity emerged as one way in which audience members created a purposeful space for negotiating how they could re-conceive or challenge the proposed adaptation to the strategy by distancing themselves physically within the space from other participants. Huddles were configured using discursive and embodied resources. This second mode of distancing was an embodied form manifested by participants physically moving away from the preconfigured arrangement of space and furniture

that symbolized the central setup for participation. In all instances where this form of huddling emerged, the distancing took place during tea, lunch and comfort breaks. Most importantly, huddling enabled audience members and actors alike to find agency within the strategy workshop that enabled them to engage with the strategy process or strategic issues freely as it was done away from other participants. The outcome of the huddles would lead to strategic alignment and at times, expedite the decision-making process or alter the trajectory of the meeting.

In instances where the actors huddled, they would revise the trajectory of the workshop or brief the next individual due to speak or, as seen in Episode 15, huddles were also used to resolve conflicts between actors that may have occurred due to a disagreement that arose during the meeting. This instance captures a time when Tshepo asked for the meeting to take a short recess so he could speak to members of the SMO team about what they were expecting the team to do during the environmental analysis phase of the meeting (he also questioned why this had not been done in the six months since the launch of the strategy). While this huddle did not lead to changes being made to the strategy, it had implications for the strategizing process as the decision was made to omit a strategy artefact from the strategizing process. However, huddles were not always present in the meetings and in instances where they did emerge, they were peripheral to the ongoing meeting and led to strategy-work-related decisions that changed the strategic outcome or the strategizing process.

Similar to affiliative groups, huddling was engaged by a subset of participants with the intention of excluding others in the interaction. Unlike affiliative groups, huddling occurred outside of the meeting. The findings show that this emergent form of participation enabled participants to find agency within the away strategy meetings. The huddles were temporary and excluded the use of materials. They emerged as an activity that enabled participants to expedite strategic issues in the absence of the rest of the team and talk openly about issues that they may have omitted in the meeting. The huddles concluded in one of two ways, the first being a transitioning process where a representative of those engaged in the huddle would talk to another member of the team about the issue and gain their view or alignment in the issue. A second outcome that emerged was in instances where the tentative adaptation of the strategy was discussed during the huddle would be presented as a repositioning stance within

the meeting. In certain instances, the stance led to change in the outcome of the strategy and in others, it offered the team a better understating of the perspective the members engaged in the huddle wanted to present.

While all the interaction took place within the meeting space, or the action area, which is indicated in the model through the blue line, the shift between preconfigured and peripheral participation emerged through a concept I refer to as improvised adaptation. In the following section, I discuss how improvised adaptations emerged in the data and how the three different resources were used to shift between preconfigured and peripheral strategic participation. In this section, I also propose that these two forms of participation are connected and are mutually constitutive to participation at an away strategy meeting. Furthermore, I present two patterns of participation frameworks that summarize the dynamic interrelationships that the activities had with each other. These interrelationships summarize the two types of strategic work that resulted in the configurations of strategic participation engaged in by the participants at an away strategy meeting. They contribute to the theory of improvised adaptation as a practice engaged in to accomplish participation by mobilizing the three resources which are the focus of this study.

5.4 Improvised Adaptations

In the sections above, I identified two forms of participation, as well as the concepts that underpin them. What the findings show is that these two forms of participation are mutually constitutive through a concept that links them, which I term *improvised adaptations*. In the context of this study, improvised adaptations emerged when shifts were made in participation from one form of participation to another. The term improvised adaptation was chosen to explain how participants interchanged their form of participation as they oscillated between a preconfigured form of participation and a peripheral form of participation through an improvised adaptation through the manner in which a material, discursive and embodied resources were employed by participants.

During the strategy workshops, participants mobilized the resources through improvised adaptations to how material, embodied, and discursive resources were used. This was accomplished through how they interacted by making improvised

adaptations to the mobilization of the resources, which influenced preconfigured forms of participation – as a result of improvised adaptions engaged in during a peripheral form of participation. The improvisations made by participants led to a tentative and at times, permanent changes in the strategy initiation or the content strategy material available to participants during the course of the workshop when it was later presented to the rest of the team.

5.4.1 Discursivity as an Improvised Adaptation Enabler

By temporarily engaging in whispers, codeswitching and at times, exchanging written notes, participants formed affiliative groups within meetings where they could negotiate issues prior to presenting their perspective in ongoing discussions. An example of how whispers among affiliative groups later influenced the outcome of the resolutioning was evident through how members of the SMO team shared whispers between themselves to expedite the adaptation made to the strategy. While Peter made the initial suggestion through a preconfigured stance in a preconfigured form of participation for all to hear and contribute, the actual adaptation to the strategy was made through the whispers and backstage interactions between members of the SMO team who engaged in a peripheral form of participation as they swapped notes, whispered adaptations. They also and removed the PowerPoint presentation from the view of the rest of the team until the change was made to the balance scorecard. This resulted in a quick adoption of the change to the wording of the strategy, following a 32-minute-long deliberation on what the actual wording should be.

Code switching was one example of an improvised adaptation to the language used in a meeting to enable participants to reflect on and discuss strategy-related issues that arose in the preconfigured form of participation. Codeswitching among participants also enabled participants to align their views on strategic issues as an affiliative group and then present them to the rest of the team as a proposed stance. For example, when Zakhele's point was initially dismissed by the team, he turned to Thabile and spoke in a different language so she could understand his view. Having understood this in the peripheries of the meeting, Thabile was then able to advocate for Zakhele's point to be heard by the entire team. Although the point itself was not adopted, Zakhele was able to present his views on a strategic issue by expressing himself in a different

language to an affiliate. It enabled him to gain agency within the meeting and cohesion with another member of the team. Thus, an improvised interaction was created by changing the language spoken to enable the presentation of a new stance in the preconfigured form of participation. The two participants were able to contribute to the preconfigured form of participation through a peripheral form of participation as a prelude to their contribution within the meeting.

What the two examples display is that in instances where participants break away from the preconfigured form of participation, they do so by making improvised adaptations through how they employ the discursive resources of language and audibility. The second key characteristic that enabled this improvised adaptation was the close proximity of the participants.

5.4.2 Embodied Resources as Improvised Adaptations

An improvised adaptation to the preconfigured notion of how intermixing should take place between participants through the absence of a seating plan, led to affiliative groups based on one's institutional and personal affiliation. Where people sat emerged as an embodied resource that enabled participants to interact with each other through improvised adaptations. For example, members of the SMO team sitting next to each other meant that they had patterns of embodied interactions available to them that other participants could not access. Similarly, Zakhele, Thabile, and Mandla choosing to sit next to each other at the start of the meeting was an improvised adaptation to how the space was intended, but it later meant that they too could engage in constellations of interactions that needed them to be in close proximity to each other. This sheds to light the second enabler of improvised adaptations: embodied resources as improvised adaptions.

Huddles were also an act of improvised adaptation to how the space was configured for interaction between participations. By improvising how participants engaged during a break, participants were able to adapt embodied resources for the enablement of improvised adaptations to the participation framework. When Tshepo and the SMO team were at loggerheads about the next strategy activity, the issues was resolved through a temporary huddle. By moving away from their seats and gathering around

each other, they were able to talk out of earshot of other audience members about why they were in disagreement and came up with a resolution to the problem that enabled the workshop to continue.

An analysis of the data revealed that participants having close forms of embodied interactions were able to shift from one form of participation to another due to their ability to continually talk to each other and report what their thoughts were on the ongoing interaction. They were also able to give regular feedback in subsets of groups through close embodied interaction among each other. For example, Thabile, Zakhele and Mandla were able to support each other's points of view as they oscillated between interreacting as an affiliative group within the meeting and then later huddling together during the break. In instances where participants were not sitting in close proximity during the meeting, huddles enabled them to make an improvised adaptation to their orientation in relation to each other within the space. This allowed them to negotiate a strategic issue in a way that they could not during the preconfigured form of participation. It was a stance to which they later reverted to, to share strategic alignment during the stance taking or resolutioning on the issue discussed during the huddle.

5.4.3 Material Resources as Improvised Adaptations

Improvised adaptations related to the use of material resources were prevalent in the pre-enactment phase and influenced all subsequent phases of the meeting. The improvised adaptation to the use of the strategy artefacts during this time would lead to the omission or adaptation of the PowerPoint presentation. For example, an improvised adaption was made to the content meant to be presented at a workshop prior to the start of the meeting. An example of this was illustrated in the findings when Thando, the facilitator of the meeting, had prepared the workshop based on a strategy given to him by the head of strategy at NdaloCo as content meant to help establish numerous points for the team to test and adapt their strategy. The impromptu conversation between Thando and John, which occurred moments before the start of the meeting, led to an improvised adaptation to the trajectory of the strategy workshop, specifically the content of the workshop and the materials available for discussion in the meeting. The conversation led to the omission of the Vision 2014 document and

resulted in an incomplete strategy workshop. The following day, when Thando, a fellow SMO team member, offered a summary of the workshop in a conversation between himself and Clive prior to the start of the third day of the workshop, it became apparent that the exclusion of the Vision 2014 document was a great hindrance to the workshop.

Clive noted the gaps in the balanced scorecard and requested that Thando, together with members of NdaloCo, make improvised adaptations to their presentation before the start of the meeting. The team met and revised the balanced scorecard, ultimately presenting a different presentation to the team than the one prepared the day before. Later in the meeting, Clive asked why some information that may have been beneficial to the SFA theme was omitted. John replied by explaining that he felt that this was not information aligned to what the SFA does and was thus omitted from the presentation. Peter agreed with this assertion and consequently, this strategic initiative that NdaloCo was currently implementing was omitted from the strategy SFA strategy.

What the findings show is that improvised adaptations happen and either highlight the resource in use or the outcome that has resulted from the transition between the two forms of participation. What this finding contributes to what we know about participation is that the resources used in strategy workshops are not always mobilized in the envisioned manner, as seen in peripheral forms of participation. Instead, in instances in the meeting where there is a temporal opportunity to engage outside of the set time at which the meeting takes place, participants can improvise their participation through a peripheral form of participation. Furthermore, in instances where they are within the meeting, as with their participation in a preconfigured form of participation, they can engage in a central form of participation. In there, they can then mobilize the resources to establish, maintain, and engage in a singular point of focal prominence, which is open for all as the practice is one that is meant to include all who are present. However, in instances where, due to disagreement, misalignment or the sense that a choice has been made by a participant to gain agency outside of the preconfigured form of participation, they make use of the resource in an improvised manner. This slight adaptation to the resource can be used to enable the participants to gain access to the strategy process in a less configured way and in a self-governed manner. This shows that the resources have both a preconfigured used (as they are

mobilized to achieve a form of participation that is inclusive). However, where they do not achieve this, they also have a symbolic alternative meaning to those attending the strategy workshop as some of the attendees used the same resources to access a secondary form of participation. Such participation was peripheral in form but significant in constituting the ongoing interaction among participants in the preconfigured notion of participation.

CHAPTER 6: DISCUSSION

This chapter provides a synthesis of the thesis to discuss in detail the findings from my study's theoretical and practical contributions. Using strategy-as-practice theory as the theoretical framework underpinning the study, I adopted Hendry and Seidl's (2003) framework in the analysis of meetings by identifying how discursive, material and embodied resources were mobilized across various phases of a strategy workshop. More specifically, I sought to understand how these resources enabled/ hindered strategic participation at away strategy meetings. As such, the research question I posed throughout this thesis was:

> *How are embodied, material, and discursive resources mobilized to enable/ hinder strategic participation?*

To answer to this research question, I begin this chapter by summarizing the main findings from the study and demonstrate how the findings answer the research question. I then return to the literature on strategy-as-practice, elaborating on how the structure of an away strategy workshop as an episodic event i.e. as the empirical site of this study, contributed to my appreciation of how discursive, material and embodied resources are collectively mobilized in strategic work.

6.1 Review of Findings

The findings showed that there are two forms of participation engaged in by participants attending strategy workshops. I refer to them as preconfigured and peripheral strategic participation. By using Goffman' (1959) dramaturgy as an analytical lens, as discussed in Chapter 3, the analysis and interpretation of the data revealed that the two forms of strategic participation work jointly, enabling social actors to accomplish a strategic outcome. What the findings show is that the resources alone are not sufficient understanding of the phenomena, but that they do offer us the analytical focus from which to understand the activities that contribute toward strategic participation. What emerged as being especially significant is that preconfigured and peripheral forms of participation work together, and that both are necessary in enabling strategic participation due to interactional asymmetries (Hoon,

2007) that emerged within the meetings. It emerged through the analysis of the data that differential forms of access to strategic participation were used to influence strategic outcomes. These were primarily due to the pre-allocated roles that some participants had within the meeting, their status within the organization as well as their (in)ability to contribute to the ongoing meeting in ways that influenced the strategic outcomes.

Through my findings, I argue that that strategic participation was accomplished through six interconnected activities i.e. pre-meeting interactions, expositioning, affiliative groups, stance taking, huddles, and resolutioning. These were connected by the concept of improvised adaptations. Improvised adaptations in how resources were mobilized, both during the course of the meeting and external to the meeting, enabled participants to shift between the two forms of strategic participation. This was accomplished through the mobilization of discursive resources (such as codeswitching and whispers in meetings), embodied resources (such as huddles), as well as material resources (as exemplified by the evolving use of PowerPoint presentations during the course of the workshops). The three above-mentioned resources were mobilized inclusively (as seen in preconfigured strategic participation) and exclusively (as seen in peripheral strategic participation).

Thus, preconfigured and peripheral strategic participation have embedded within them activities that contribute to the negotiation of power positions and also facilitate possibilities of changing those differential forms of participation. It also emerged from the data that it is possible for participants to participate in both preconfigured as well as peripheral interactional regions of the meeting through an array of practices that inform and shape the strategizing process. This was done by finding ways in which to exit formal forms of preconfigured strategic participation in order to create purposeful spaces for negotiating the object of strategic attention and then reinsert oneself, through peripheral practices, into preconfigured forms of participation in ways that influenced the strategizing process and its outcomes.

These findings show that peripheral forms of participation are important to strategic participation, not simply as an indication of an alternative mode of participation within strategic meetings, but rather as a practice used to negotiate one's agency within

meetings and improve the efficacy with which one may influence the strategic outcome. Peripheral strategic participation enabled participants to engage in alternative strategic processes to those preconfigured by the strategy management office. Through these alternative and improvised adaptations, subsets of social actors were able to resist and negotiate restrictive notions of participation. In that way, it enabled realigning or delineating approaches through peripheral strategic participation and then re-emerging within the preconfigured form of participation, having a strategic stance from which they would engage in preconfigured forms of participation.

6.2. Meetings as an Episodic Phase of Strategic Participation

In this study, I have sought to respond to the research question related to the resources that mobilize strategic participation with a particular focus on discursive, material and embodied resources within the context of a strategy workshop as the empirical setting. As such, the first contribution made to the literature on participation relates to the classification of strategic episodes and the analytical framework used to analyse a strategic episode. As reviewed in Chapter 2, Hendry and Seidl (2003) suggest that meetings are episodic events that consist of three phases i.e. initiation, conduct, and termination. Adopting this framework in my study influenced my analysis and interpretation of the diverse activities that emerged within each phase of the meeting. Additionally, the authors' framework helped me identify how each phase contributed to the cumulative act of participating in a strategy workshop. From this, I identified the activities within each of the three phases in what I term preconfigured participation. These were expositioning in the initiation phase, stance taking in the conduct phase, and resolutioning in the termination phase.

In addition to these three phases, I identified a fourth phase, which dramaturgical scholars believe is of great significance in understanding and interpreting interactions. Thus, this led to the identification of the pre-enactment phase (Hare and Blumberg, 1988) of the away strategy meeting. Notably, the pre-enactment phase of the meeting preceded the initiation phase. Its inclusion in my definition of a strategic episode is based on the dramaturgical analysis that led to the identification of pre-meeting interactions as activities of significance to the participation in strategy meetings. The pre-meeting interactions observed not only shed light on the affiliative relationships

shared by participants, but also exemplified how interactions that take place before the start of a meeting can influence the outcome of a meeting, as seen in the omission of a document of strategic significance in one of the episodes.

Adopting a dramaturgical analysis lens led to the inclusion of all interactions that took place from the time the first participants entered the meeting space up until the last participant's departure. This was done through a careful analysis of periods of interaction between participants over the course of the three days. As such, my study contributes to the strategy-as-practice literature as it develops and extends the concept of meetings being episodic, i.e. "[t]he basic function of episodes is simply to make it possible to suspend and replace structures for a certain time period" (Hendry and Seidl, 2003, p. 183) in strategic participation. Building on the conceptualized notion of meetings as the three aspects (initiation, conduct, and termination; Hendry and Seidl 2003) as a framework, my findings develop the notion of "structuring characteristics" (Jarzabkowski and Seidl, 2008, p. 1391) found within a meeting. It discusses how *expositioning*, *stance taking* and *resolutioning* emerged as practices that consisted of microevolutionary activities embedded within them. I discuss next: how these practices emerged and examine the microevolutionary activities within them as they offer insights into how smaller mechanisms that make up a meeting shape central strategic participation.

As discussed in Chapter 2, Hendry and Seidl (2003) listed six common characteristics of meetings. In the meetings studied, I observed the presence of all six characteristics within the meeting. Three of these offer us further insights into meetings within the strategy-as-practice literature, specifically, regarding the fact that the meetings were *planned*, *episodic* and enabled participants to be *co-located* in a physical or virtual format. I begin by discussing how the structure of away strategy meetings enabled/ hindered participation among participants (Hendry and Seidl, 2003). From these two findings, a theory of preconfigured and peripheral strategic participation across four phases of an away strategy meeting was developed. Previous literature on strategy meetings has focused on the use of a singular resource in the analysis of meetings and focused on the use of interviews and observations in the study of practices that mobilized these resources. By employing Goffman's (1959) impression management theory, my study reveals how the resources worked in tandem in the performance of

participation within an away strategy meeting, framed as a theatre performance. By zooming in and out (Nicolini, 2010a) of the phases identified by Hendry and Seidl (2003) as an analytical framework used to examine meetings, my study reveals that strategic participation is an episodic process that has cumulative phases and distinct practices within them. These phases and practices collectively contribute to the process of establishing the context in which strategic participation is initiated and later terminated in the enactment of an away strategy meeting.

6.3 The Identification of a Fourth Phase of a Meeting: The Pre-enactment Phase

The identification of the fourth phase was influenced by the use of a dramaturgical analysis, as scholars who apply this analysis suggest that all forms of interactions, including those that happen prior to the start of the interaction, are significant to understanding participation. The pre-enactment phase, within the context of away strategy meetings, consisted of pre-meeting interactions that were both verbal as participants engaged in pre-meeting talk and non-verbal as participants orientated themselves to the space in which the meeting was about to take place. This phase of the meeting proved to be significant in how strategic participation unfolded as some pre-meeting interaction among actors delineated the strategic content. This was evident in the omission of a strategic artefact and the realignment of strategic outcomes moments prior to the start of the meeting. Again, the formal and informal interactions between audience members prior to the start of the meeting were indicative of the symbolic meanings they attributed to different material resources within the meeting space.

6.3.1 Meetings as a Planned and Improvised Activity

As previously mentioned in Chapter 2, Hendry and Seidl (2003) identified three phases of a planned meeting: initiation, conduct and termination. Similarly, these three phases of the planned phase of the away strategy meeting were present in the current study and this framework helped differentiate between three forms of activities that took place in each phase as I was able to identify *expositioning* in the initiation phase, *stance taking* in the conduct phase, and *resolutioning* in termination phase. The three activities within each phase of the meeting were all included within the agenda and expected activities among participants to help them reach consensus, as well as help

enable all present to test and adapt the strategy collectively. Through the application of this framework, my findings show that expositioning, stance taking, and resolutioning collectively contributed toward a preconfigured form of participation. In addition to identifying these three forms of activities within the three phases of a meeting, my study contributes to the strategy-as-practice literature as the findings show that, in addition to the three phases of a meeting identified by Hendry and Seidl (2003), an additional phase that proved to be significant to strategic participation was the pre-enactment phase (Goffman 1961; Hare and Blumberg, 1988). Therefore, the analysis of the interactions engaged in prior to the start of the meeting contributed to the identification of an additional phase in the meeting as well as an additional activity. The inclusion of this phase as part of the meeting led to the identification of the first two activities, later classified as peripheral forms of strategy work i.e. pre-meeting interaction and affiliative groups. The choices made in the pre-meeting interaction, later influenced how participants mobilized discursive resources and the embodied interactions they later engaged in. Such was in accordance to the affiliative groups they associated with and their ability to use various languages i.e. whispers and discursive resources as part of their strategic participation, all of which are discussed later in this chapter.

6.4 Discursive, Embodied, and Material Resources Mobilized in Away Strategy Meetings

The process of strategy making is one that requires the participation of actors from different departments within the organization (Hart, 1992; Jarzabkowski and Kaplan, 2015). The first practice that emerged within the expositioning phase from the analysis of the strategy meeting was the enrolling of participants. The findings show that the discursive act of presenting the various types of monologues, together with the use of coupling resources within the meeting, contributed the formation of a practice that closely resembled the definition of the type of monologue it was. Collectively, the monologues performed two roles in the initiation phase of the meeting. First, they established a bond among the participants by enrolling participants from across different departments and subsidiaries within the organization by means of modular affordances (Kaplan, 2011). Second, they acted as an inciting incident for the co-production of meaning among the participants.

The findings show that the act of enrolling participants emerged as a recurring practice throughout the meeting. The first time was through the opening monologues at the start of the meeting, which were aimed at facilitating the co-production of meaning created by the actors. The following times were during the meeting when participants presented a positioning stance aimed at inciting the act of testing and adaptation or the introduction of a new strategic initiative. This section focuses on the observed occurrences that contributed to enrolling participants at the start of the strategizing process. The formation of an envisioned cast of strategic actors (which included all who were present) was necessary for the development of issues of strategic focal prominence. The development of the strategy theme team's alignment with the ongoing strategy process within the organization and the banking sector was important in preparing the participants for the enactment of preconfigured strategic participation. The development of the strategy required both the expertise of the members of the strategy team and their sensitivity toward what was happening in the rest of the organization in relation to their strategic focus areas as well as developments occurring within the industry. To enable a better appreciation for the context in which the strategy was being formulated: the executive director, the strategy team, and subject matter experts from different department functions within the company contributed to facilitating the process of enrolling participations into a cast of strategists.

In order to appreciate the contribution made by the current study to the existing strategy literature on meetings, it is important to highlight that one must be aware of the primary focus of this study. The perspective taken in this study is that the resources used within the different phases of a meeting are ones that emerged due to the multimodal use of three resources during the course of the meeting i.e. discursive, material and embodied resources. The ensuing shift toward a multimodal turn within the strategy-as-practice programme (Dameron et al., 2015; Jarzabkowski et al., 2015; Le and Spee, 2015) mainly concerns the notion of affordances availed by these resources, and this is underpinned by the conceptualization of the strategy tools as "material" (Dameron et al., 2015, p. S2) used in strategy work that have both material and conceptual affordances (Jarzabkowski and Kaplan, 2015). From this, one may assert that material tools enable purposeful action. For example, in Kaplan (2011), PowerPoint was shown to have been used to enable certain actors to focus and highlight information that was beneficial to issues of focal prominence, enabling

certain actors to draw attention towards only information that was pivotal to then gain approval for their cause. This was done through the inclusion of certain slides as opposed to others, and these actors used the PowerPoint presentations as a way to include as well as to exclude certain actors in the strategic work. Jarzabkowski et al. (2015) demonstrated how this was used to enable intentional action among re-insurance underwriters through the analysis of how they physicalized practice and their analysis of the entangled nature of the work being accomplished together through the use of the objects such as the spreadsheet, computer screens and note pads.

This study, on the other hand, found that the use of the object engaged with during the course of the away strategy meeting evolved throughout the course of the meeting according to the phase and practices the participants were engaged in. For example, during the initiation phase and presentation of the orientating monologue, the PowerPoint presentation was used to sequence the strategy process and authenticate the ongoing strategic work taking place throughout the organization. The affordance availed by the use of the PowerPoint presentation, together with the discursive orientating monologue, is one that framed the strategizing process as a way of reporting and, at times, as a pedagogical tool, due to the new framework and the need to orientate people to what it was meant to enable the organization to accomplish. The findings show that the actions of the user were the result of the intent of the actor using the tool as a way of achieving their intent (Mintzberg and Waters, 1985).

The analysis of the collective use of resources prior to the start of the meeting also shed light on the symbolic meaning infused in the material objects and artefacts found within the context in which meetings take place, and how this was interpreted by participants. Table 6.1 presents the resources identified in the various phases of the meeting. In the subsequent section I detail how each resource contributed towards the enactment of the strategic episode in different ways. I also note that although the resources were prevalent in each phase, there was one resource (or at times, two resources) that upstaged the others and emerged as the dominant resource used by participants to facilitate either a preconfigured or peripheral form of strategic participation.

Table 6.4. Resources identified in the various phases of the away strategy meetings.

Concept	Discursive resources	Material resources	Embodied resources
Premeeting interactions	Pre-meeting talk Pre-meeting interactions Silence	Spatial arrangement Symbolic props and artefacts	Affiliative groups
Narratives/ expositioning	Metaphors Narratives Scenarios	Props PowerPoint	Gesture Gaze Bodily orientation
Stance taking	Questioning Backstage rhetoric Frontstage rhetoric	PowerPoint	Gesture Gaze Bodily orientation
Affiliative groups	Whispers Code switching	Close proximity	Achieved status Ascribed role
Huddles	Code switching Backstage rhetoric		Bodily orientation
Resolutioning	Dialogic interactions	Cartography	Gesture

6.5 Discursive Resources as Enablers of the Co-production of Meaning

In this section, I draw on three key studies detailed in Chapter 2. The first is that of Mantere (2008), who contributed to the strategy-as-practice literature by identifying five discursive practices used by middle managers to facilitate enabling conditions for strategic participation. The second study is that of Clarke, Kwon, and Wodak (2011), who examined the role of the chairperson in meetings and how they shape participation with a particular focus on reaching a consensus. The third study is that of Kwon, Clark, and Wodak (2014), who focused on the role of the participants.

Similar to Mantere (2008), I found that *narration* was a prevalent discursive practice used to communicate the strategy using a top-down approach. Cascading the strategy and positioning new strategic initiatives was used to exposition the strategy during the initiation phase of the meeting. However, it was also present when the participants

established the positioning stance during the conduct phase of the meeting through the delivery of monologues. Mantere (2008, p. 302) defined narration as instances when "top managers open up the internal logic of thought processes leading to the selection of strategic direction, linking it to past experiences". Through an analysis of the three resources used in the delivery of the different monologues in this study, I identified three types of narrated monologues. Each one differed according the embodied role of the participant within the meeting. The material resource was used to authenticate the monologue and the indented outcome of the narrated monologue. What the findings show is that the most senior members present at the meeting started the meeting by narrating a monologue aimed at collectivizing participants by offering the participants an internal logic of their thought process regarding the progress of, and impediments to, the implementation of the strategy. Similar to Mantere's findings, this monologue not only assessed the incremental progress made, but also gave the team insights into areas where the strategy needed to be expedited and how it would be a collective endeavour as opposed to one achieved by a single department.

The use of metaphors is a common strategy for team-building (Vaara et al., 2003). Metaphors were used to help collectivize participants in that the recurring use of the metaphor of a journey was used repeatedly across the organization by senior executives, both as way of teambuilding and of collectivizing participants through what was primarily a discursive resource. When the embodied lens was applied in the analysis of the delivery of monologues across the strategy workshops, micro-characteristics in the combined use of resources were evident in how the three types of monologues were delivered by various actors. For example, the facilitators and subject matter experts used PowerPoint presentations as an authenticating practice (Schulman, 2017). The sequential order of the strategy process enabled the team to cascade the strategy. Subject matter experts used both the PowerPoint and reference groups (Hare and Blumberg,1988) in the substantiation and narration of the strategy.

Applying symbolic interactionist epistemology, together with the dramaturgical analysis in the scrutiny of the micro-interactions meant that both the actors and audience members present in the meeting were significant in fully appreciating the moment of interaction (Goffman, 1961). The findings show that that audience members used dialogic interactions as a form of micro-narrative in response to the

monologues. This led to the act of the co-production of meaning among actors and audience members as backstage rhetoric discussed through a top-down strategizing approach that became frontage rhetoric (*ibid*) and which enabled bottom-up appreciation of the strategy.

It emerged that discursivity as a resource used in meetings was present in all aspects of the away strategy meeting. By virtue of its characteristics, it was identified as a communicative event that enabled participants to engage with the matter at hand. The application of Goffman's theory of presentation shed light on alternative modes and use of discursive resources. This emerged in the form of code switching as a discursive resource used in instances where participants engaged in peripheral strategic participation. Additionally, in alignment with Jarzabkowski et al. (2015), silence was also used by participants as a discursive resource to draw attention to a point being made or allow participants to take what was being said into consideration over a prolonged period of time during which the silence prevailed. Metaphors also emerged in a recurring pattern used by executive members to collectivize participants and orientate them towards a unified form of participation as a singular theme. The prevalence of monologues was noted as a discursive resource particularly prevalent in the initiation phase of the meeting as an enabler of the establishment of the co-production of meaning.

As evidenced above, the interplay between the resources is significant in fully appreciating how strategic participation is enabled/ hindered. In section 6.5.1, I draw on Hoon' (2007) study, which illuminates a cross-effect between discursive and embodied resources. My findings align with Hoon's study, also identified as peripheral forms of strategic engagement in strategy meetings that later influenced the formal interactions.

6.5.1 Embodiment as a Resource

Due to the multiparty nature of the away strategy meeting, two key themes emerged in how embodiment as a resource played a role in enabling a dual form of strategic participation. This thesis builds on the studies of Wenzel and Koch (2018) (where the focus was on a single actor) and Jarzabkowski et al. (2015) (involving two participants

engaging through multimodal forms of interaction) by showing how complex patterns of interactions emerged when strategizing occurred between multiple parties. The first was the emergence of two embodied roles i.e. actors and audience members. Among the actors were the facilitators, subject matter specialists, and executive managers who together, embodied participatory roles within the meeting. These roles were primarily informed by their institutional identity within the organization, which aligns with Hare and Blumberg's (1998) conceptualization as someone having an achieved status within an interaction as a way through which one negotiates one's participation. It was evident in this study that although participants temporarily decoupled from the physical structure and location of their daily routines, the institutional roles they embodied were ones which they continued to enact during the course of the away strategy meeting even though strategy retreats are a space in which these identities are meant to be suspended.

In the study, I found that participants engaged not only in alignment with their rank within the organization, but also in alignment with affiliative relationships they had as members of departments and subsidiaries within the strategy theme team. This contributes to the literature as follows: instead of using a participant's rank within an organization, strategy-as-practice scholars could consider the pre-existing affiliation and symbolic relationships between participants. By applying a social constructivist ontology and epistemology based on symbolic interactionism, it emerged in this study that symbolic and temporary identities associated with being a part of different institutional teams, as well having divergent social relationships, enabled an analysis of how participants interacted within the meeting. Thus, affiliations and symbolic relationships provide an ontological and epistemological lens for this study. This application was multi-layered as the notion of a singular audience was dispelled through the emergence of temporary couplings and relational clusters among the meeting participants.

How participants orientated themselves in relation to each other, led to an appreciation of how clusters were temporarily formed to enable peripheral forms of participation. On the other hand, the use of gestures and gazes enabled me to distinguish between the different stances taken by participants according to the interconnected way in which participants privileged the use of gaze and gesture among each other, as well

the materials in the choreography of each stance. Gazes, gestures and bodily orientation were recurring aspects of embodiment (bodily resources) which helped in creating clear constellations of embodied interactions. These bodily resources contributed to how I differentiate between preconfigured and peripheral forms of strategic participation. Similar to Jarzabkowski et al. (2015) who found that different constellations of interactions create different forms of strategic work, this study found that different constellations of embodied interactions determined different forms of strategic participation.

Hoon's (2007) study suggested that middle managers found agency in informal interactions with senior managers as it enabled them to gain alignment with senior managers, but also influenced the strategic outcomes of the meeting because of the variety of modes of communication used by the participants in informal interactions that later influence formal interactions in meetings. This was a key observation in the context of this thesis as it informed my analysis of the data because it sensitized me to the interactions that took place in the frontstage and backstage of the away strategy meeting.

As a result, I was able to differentiate more clearly between formal and informal interactions, in the form of the embodied interactions that took place outside of the formally allotted time within the meeting (including the pre-enactment phase and the huddles). These two activities were forms of improvised adaptation used by audience members as a way to establish self-governed agency and alternative modes of employing resources to influence strategic outcomes. The triggers to the improvised adaptations came from disagreements during the preconfigured form of participation and the findings show how these were resolved in the peripheral form of participation.

This confirms Hoon's (2007) findings that: in instances where the emergence of interactional asymmetries emerged, participants perceived the power embodied by a senior member making adaptations to the strategy process. Huddles established during these breaks enabled audience members to communicate the ideal strategic outcome they desired away from the preconfigured form of the meeting. What this shows is that, not only do these peripheral modes of strategic participation happen through the use of emails and one-on-one conversations that emerge in away strategy meetings,

they also take place in away strategy meetings in the form of embodied interactions through activities that I regard as peripheral forms of participation, which includes pre-meeting interactions and huddles.

While these interactions as highlighted by Hoon (2007) can be seen through the discursive lens, these interactions were actually more prevalent when an embodied lens was used because what enabled these backstage interactions was how various participants that embodied different roles used the physical re-orientation of their bodies to form huddles as a way of creating backstage regions amongst themselves. Furthermore, what the data shows is that these forms of interactions also happened in the meeting through affiliative groups, as seen in the resolutioning episode where members of the SMO team huddled amongst themselves within the meeting through whispers and notes as a way of resolving a strategic issue and seeking alignment with an assertion that Peter had made in the meeting.

6.6 Material Resources as Adaptative Resources

Although the built space was preconfigured as a central location and the arrangement of the furniture was meant to symbolize a homogenous intermixing of the different teams that formed the various strategy theme teams, this was not achieved. Instead, the free seating within the space which was arranged as a material resource aimed at encouraging the absence of hierarchy and promotion of intermixing among participants, was interpreted as one embedded with similar hierarchical structures to those in the participants' daily roles. An analysis of interactions prior to the start of the meeting revealed how symbolic meaning was associated with certain areas within the space. Certain empty seats were associated with a high status in the meeting. Differences in the materials resources placed on the different tables were viewed as markers of in-meeting roles and participants' power within the organization was evidenced by where different members of the organization sat along the U-shaped tables.

An important finding was that, although the environment was meant for intermixing, participants chose to sit in heterogenous groupings which led to the formation of affiliative groups. This influenced the in-meeting interaction they would later have

with each other when participating within the meeting. The findings shed light on how materiality as a resource contributes to enabling as well as hindering strategic participation. For example, the symbolic meaning infused into props such as name tags are representative of the preconfigured notion of how strategic participation is meant to unfold. The spatial arrangement of furniture within the space aligned with the symbolic meaning infused into the space by enabling participants to see each other and engage in unobstructed face-to-face interactions. These were both important and significant in enabling strategic participation.

Similar to Kaplan (2011), the use of PowerPoint presentations emerged as a crucial material resource used throughout the away strategy meeting. What was significant to the findings was how the symbolic meaning attributed to the PowerPoint presentation shifted and changed according to the phase in which the material resource was used. For example, in the pre-enactment phase, the material acts as an orientating artefact that serves as a pretext for the envisioned form of participation. In instances where there was a misalignment regarding how the pre-text was to be used, an alteration to the PowerPoint led to an ultimate change. This change also altered the interaction engaged in by the participants in the away strategy meeting, as seen in the omission of certain strategic artefacts and the inclusion of others.

In the initiation phase, the PowerPoint presentation took on a symbolic representation of a collectivized narrative of the overarching strategy process. The cascading of FinCo's strategy through the combined use of discursive resources as well as the PowerPoint presentation, supported the phenomenon of narrativization as identified by Mantere (2005). Here, the PowerPoint enabled strategic participation as it was used as an artefact to present the sequence of events, which contributed to the overarching strategic process within the organization's strategic process map. The strategy theme team used this to orientate participants toward the eminent roles they were about to play in contributing to the narrative presented.

In the conduct phase, the PowerPoint presentation served as a key resource in inciting different forms of engagement. It served both as an authenticating resource and a reference point for where and how the strategy could be tested and adapted. This links directly to Kaplan's notion of how the PowerPoint presentation can be used as a

collaborative and cartographic resource. It was only once the team had reached consensus following the movement/ shifts between the different stances that the acts of resolutioning as per the termination phase of the meeting could take place.

In the termination phase of the meeting, the predominant role played by the PowerPoint presentation was in serving as a representation of the consensus reached by the team as they presented a summation of the strategic work in the form a newly developed strategy. What this shows is that material takes on different practical as well as symbolic meaning according to the phase in which it is used by participants during the course of the meeting. Similarly, it also highlights how certain materials take on a prominent role in the enactment of strategic participation. Material such as the special arrangement and the symbolic meaning of props such as name tags, began to take a less prominent and perceivable role in the strategic outcomes.

6.7 Entanglement of the Resources Enable the Participation

Towards concluding this chapter, my findings have shown that each mechanism plays a distinct role in strategic participation. The primary contribution made in this thesis is the model, the mechanisms represented within it, and the relationships that the mechanisms have with each other. Taking the model in Chapter 5 into consideration and relating it to how the various resources influenced the concepts identified in each activity, although some resources were prominent, they are not used in isolation from other identified resources. For example, in the pre-meeting interactions it was the significance of the embodied interaction taking place between a subset of participants that was the dominant resource that distinguished the form of participation engaged in by the actors. This significance of the embodied interaction enabled the identification of the emergence of the peripheral form of participation.

Stance taking was a mechanism where all three resources together contributed significantly toward the enactment of strategic participation. Here, the significance of the entanglement between the social and the material was the most visible or significant to the analysis of the resources. Thus, the combination of all three resources contributed towards preconfigured strategy participation. Similarly, peripheral participation, particularly huddling, was one that also engaged with all three resources

but it was the dominant application of discursive resources (participants' whispers and codeswitching) that led to this interaction being considered a peripheral strategy participation rather than a preconfigured form of participation.

CHAPTER 7: CONCLUSION

7.1 Introduction

This final chapter serves the purpose of presenting the main theoretical contributions that this thesis makes to strategy theory. It contributes specifically to the nascent strategy-as-practice literature on the use of discursive, material, and embodied resources as enablers/ hindrances to strategic participation within strategic episodes that take place at strategy retreats. Specifically, this thesis contributes to the genre of strategy workshops as a site of practice. The thesis identifies two patterns of strategic participation: (1) preconfigured participation; and (2) peripheral participation. The thesis develops the theory of improvised adaptations as the transitions made between the two patterns of participation. The chapter is structured as follows: first, the chapter summarizes the main findings of the study. Second it points to the contributions of the study, specifically to strategy-as-practice literature. Third it reflects the practical implications of the findings for the field of practice. Finally, it presents potential the avenues for future research, limitations of this research, and overall summary conclusion.

7.2 Summary of the Findings

7.2.1. Preconfigured and Peripheral Participation

The thesis shows that preconfigured participation consists of expositioning, stance taking, and resolutioning, while peripheral participation consists of pre-meeting interactions, affiliative groups, and huddles. These six distinct activities are interconnected through the concept of improvised adaptations, and the two forms of participation operated in a complementary manner. This thesis advances the extant literature on strategy in relation to the three above-mentioned resources by showing the micro-dynamics of this co-evolution of activities in the different phases of an away strategy retreat. It also shows that this co-evolution enabled participants experiencing "interactional asymmetries" (Wodak, Kwon, and Clark, 2011, p. 595) to employ improvised ways of mobilizing resources to accomplish strategic outcomes, which included testing and adapting the strategy.

This thesis has found that the practical accomplishment of strategic participation at away strategy workshops takes place through preconfigured and peripheral strategic participation. These forms of participation consist of embedded activities that reflect on how discursive, material, and embodied resources were mobilized to accomplish the testing and adapting of FinCo's recently launched strategy. Preconfigured strategic participation was considered a frontstage (Goffman, 1961) approach to engaging in participation. It was envisioned as a form of participation that collectivized participants and comprised activities identified in the study as expositioning (which contributed to the co-production of meaning), stance taking (which was the enactment of testing the strategy), and resolutioning (which was the collective enactment of making adaptations to the strategy). Preconfigured participation helps us understand how resources were arranged and used to shape the envisioned from of participation. This form of participation was meant to be engaged in by all in attendance of the away strategy meetings and viewed those in attendance as a homogenous team with a unified point of strategic prominence; to test and adapt the newly formulated strategy.

Collectively, participants were invited to endeavoured towards strategically elevating themselves from their daily roles within the organization to become strategic participants deciding on the strategic outcomes of the organization. Briefly, preconfigured participation in the study is defined as a form of participation that is unified and aimed at having one strategic object of attention upon which participants in attendance of the away strategy meeting are expected to engage with and agree upon a strategic approach. They also needed to resolve strategy objects either through proposing a new strategic initiative, testing and adapting an old strategic initiative, or achieving collective consensus should the previous strategic initiative be deemed to remain as it is.

What the findings show, however, is that preconfigured forms of participation alone did not help participants attain strategic participation in all instances. Rather, it was the combination of the two patterns of participation that achieved this outcome, driven by disagreements and institutional asymmetries that led to the emergence of subsets of affiliative participants within meetings. These subsets of affiliative participants intended to find ways to overcome disagreements and institutional asymmetries that emerged within the meeting due to the heterogeneity of the participants. A complete decoupling from the achieved status and ascribed roles embodied by the participants

were not suspended and led to participants using improvised adaptations to the resources available to them in aid of negotiating their participation in the meeting. This demonstrated why the emergence of a peripheral form of participation was a necessary component of preconfigured participation. Through its combination with preconfigured participation, peripheral participation ultimately enabled the influencing of the outcomes of the overarching strategic work.

Peripheral participation emerged as a purposeful space for negotiating each participant's strategic stance within the meeting, outside of or in a parallel within a temporary space away from the ongoing preconfigured form of participation. Peripheral strategic participation was considered a backstage (Goffman, 1961) approach to engaging in participation. It consisted of activities identified in the thesis as premeeting interactions (which contributed to context building), affiliative groups (in-meeting participant differentiation), and huddling (external negotiations of agency-building action). Collectively, peripheral patterns of participation offered a subset of participants an alternative avenue through which their participation in the central space could be rehearsed. In instances where participants engaged in peripheral participation, it was emergent that it was an enabling space not only for developing their agency and negotiating their stands, but also for circumventing hindrances to participation experienced within the preconfigured form of participation, induced by the formal nature or excessive power that certain participants within the meeting had in relation to how the outcome of the strategizing process unfolded. These unhindered and uncensored patterns of communication emerged in the peripheral patterns of participation as a form of self-governance, engaged in by participants temporarily, away from the preconfigured form of participation to seek alignment in the ongoing strategy process.

7.2.2. Improvised Adaptations

Analytically speaking, the thesis shows that we have preconfigured participation and peripheral participation working together through a number of mutually constitutive practices that inform each other and work together to enable the strategizing to be successfully completed. What is analytically interesting about this, however, is that due to differential abilities of diverse participants to participate in the meetings (partly because of the pre-figuring work that took place either in the meetings as a form of

expositioning, or beforehand and their level of seniority within the organization; it also represented an attempt to find ways in which different kinds of participation could be possible. Specifically, this explains both the resolving of backstage patterns of participation in preconfigured participation and the proposed basis for negotiation in peripheral participation.

7.3 Contribution to Strategy-as-Practice Literature

The thesis contributes to the nascent literature on materiality by showing the construction of space through artefacts, tools, discourse, and embodied interactions over time. As such, a differentiation is made between a physical place and a socially constructed phenomenological space. I further contribute to this literature by exploring one of its preconfigured elements, which include the use of discursive, material, and embodied resources in the empirical context.

7.3.1 Improvised Adaptions in the Use of Resources

Regarding embodied resources, in instances where participants sat next to people that they were closely affiliated to, there were inciting incidents of simultaneous dramaturgy. Participants would engage in secondary or subset forms of participation within the meeting in alignment to the affiliation they had and later re-join the meeting having come up with a collective perspective/ stance on a strategic issue. Regarding discursive resources, the findings show that code-switching (either through technical jargon, changing the language used, changing in one's tone of voice, or whispering) was an improvised adaptation of the resource mobilized by the participants shifting from preconfigured notion of participation to a peripheral form of participation. Material resources, at times, provided a stimulus for engagement in that they were adapted to enable transitions between preconfigured and peripheral forms of participation. What the thesis shows is that the exclusion of material was an inciting incident. Therefore, in instances where participants turned away from the material, they engaged in a form of dialogic interaction that mirrored how they were looking at each other as well as the way in which they embodied, for example in the form of huddles. Thus, it was intentional that the material was not the focal point of prominence, hence serving as an inciting incident.

7.3.2 Pre-enactment Phase as a Significant Phase in Away Strategy Meetings

The first main contribution made is the identification of the significant role played by the pre-enactment phase in meetings. Strategy-as-practice currently considers the strategic interaction that takes place within the remit the three phases identified by Hendry and Seidl (2003), which does not explicitly include the interaction that takes place moments prior to the start an away strategy meeting. By drawing on the study by Mirivel and Tracy (2005) that distinguished between five forms of pre-meeting talk, I was able to extend Hendry and Seidl's (2003) framework of strategic episodes in two ways.

Firstly, my findings confirm that interactions that took place prior to the start of the strategic episode contributed towards shaping and informing the three phases of a strategic episode that followed. The pre-enactment phase emerged as a phase within the meeting where the discursive use of premeeting talk amongst a subset of participants attending the away strategy meeting emerged as discussed in Mirivel and Tracy (2005). The interaction prior to the start of the meeting was significant to strategic participation as it helped those facilitating the meeting to align their views on how best to navigate the meeting. Furthermore, the interaction that took place prior to the start of the meeting hindered strategic participation in that certain strategy artefacts or information determined the boundaries of the content available for discussion during the meeting. From this, I add to the understanding of how an extended appreciation of a strategic episode, which incorporates interactions outside the agenda, can shed light on the effects these interactions may have on the rest of the meeting.

Secondly, the significance of my findings bolsters the expansion of what was previously considered a pre-enactment of strategic participation. The inclusion of body breaks and tea breaks in strategy episode meant the interactions that took place during this time, and the contributions these made to the outcome of the meeting, became relevant and important in understanding how strategic participation unfolded. The inclusion of these interactions into what I consider part of a strategy episode led to the initial identification of a peripheral from of participation and the effect this had on the strategizing process. Thus, the contribution made through the analysis of the pre-enactment phase makes is that participant interactions before the start of the

meeting foreshadow affiliative clusters, which are indicative of the forms of participation later engaged in by the participants. Taken together, it was evident that material resources that represent the context of an away strategy meeting do not hold a singular meaning but are interpreted differently by different participants.

7.3.3 Participation

Through this thesis I contribute to the body of strategy literature with the proposed model of strategic participation. The model highlights the emergence of this twofold form of participation, which were mutually constitutive and transitioned between each other through participants oscillating between the two forms of participation through a concept I refer to as "improvised adaptations". The findings show that these two patterns of participation are mutually continuative through improvised adaptations, as one enables the other. At times, these patterns of participation also unfolded simultaneously and contributed towards enabling the other. I define "improvised adaptations" as moments in the away strategy meeting where participants adapted the form of participation, they were engaged in to find ways to influence the outcome or the strategizing process. I start the next section by defining and offering an example of each form of participation and conclude by highlighting the theoretical constructs that brings them together.

7.3.4. Using Goffman's Impression Management Theory

As detailed in Chapter 3, there are two regions that Goffman (1959) referred to as stages in any given dramatic situation or setting. He suggested that the first stage denotes the backstage region, which is defined as "a place, relative to a given performance, where the impression fostered by the performance is knowingly contradicted as a matter of course" (Goffman, 1959, p. 114). The backstage region, as Goffman (1959) maintains, is a region where performers will appropriate a section of the frontstage region by symbolically being cut off from the rest of the region. This is achieved through the arrangement of tools and artefacts, the curation of space and body positions, a change in rhetoric, or overall demeanour. The backstage illuminates certain ways of embodiment and interaction between participant-actors. Their place in this design affords them a particular perspective, access to certain tools or lack of it, and determines their roles within the group.

Accordingly, I deployed this theory to the analysis of the away-strategy days in order to explore the material, embodied, and discursive construction of the backstage in strategizing at FinCo. I have shown that the meeting space was engaged in through the practice of multiple activities. As such, the materiality of the meeting space influenced the prospective performance of strategists. Additionally, it emerged as a region where the top management team leading the strategy process came together before the meeting to align their activities and prepare for their strategic work while engaging in private conversations that shaped their participation with the meeting.

7.4 Practical Implications

In addition to the theoretical contributions of the study, it is important to include the practical implications of the study. This is especially important in instances where one takes a practice-based approach. As Corley and Gioia (2011, p. 23) suggested:

> "The most important insight from a practice orientation concerning the assessment of theoretical contribution is that theoretical knowledge does not exist as a set of theory-building rules independent of actual practice; rather, it becomes inextricably intertwined with the manifestations of the theoretical knowledge in practice (and vice versa)."

The practical implications of the theoretical contributions are especially significant to strategy-as-practice based studies as "the production of knowledge should be treated as a recursive dialogue between theorists and reflective practitioners" (Corley and Gioia, 2011, p. 23). In alignment with this assertion, I now consider the practical contributions made by this study for strategist, particularly those who use meetings and away strategy meetings as a site of practice when engaging in strategic work.

In Chapter 3 of the thesis, I reviewed literature on meetings, revealing the reliance that organizations have on co-ordinating interdepartmental strategic through meetings. As meetings fulfil multiple functions within organizations, an important insight that may come from this study is how the efficacy of meetings may be increased. An appreciation of the discursive, embodied, and material resources used collectively to contribute to strategic participation sheds light on how participants negotiate their agency within meetings, which represents an insight that may help practitioners.

The first is the findings show that meetings are not seen or perceived or experienced as a homogeneous experience by those in attendance. Instead, participants view their

participation in affiliative forms. The appreciation of how different participants negotiate their agency may offer those organizing away strategy meeting insights into how they may create opportunities for legitimate forms of peripheral participation within meetings so as to encourage stimulate participation across diverse organizational teams and rankings within the organization.

The second implication that the findings have for practitioners is in planning and organizing away strategy meetings as the findings have shown preconfigured notions of away strategy meetings are not the only form or pattern which emerges within the context of away strategy meetings. Instead, there are both formal or configured forms of participating, as well as informal or peripheral forms of participations, to consider. Therefore, it may be of value to participants engaging in strategic away strategy meetings to consider how peripheral forms of participation can become acknowledged forms of participation and promoted. as agency is increased in these forms of participation.

Lastly, meetings are an important way of facilitating communication amongst various departments within an organization. As a result, managers invest a great amount of time in planning and coordinating them, as well as attending them. Therefore, greater focus may be beneficial to practitioners if reflective practice could be included in how the meeting proceeds. For example, participants could be asked for feedback on how they engaged within the meeting and how they interacted. As strategy-as-practise is a practise-focused approach to strategic work, it would potentially be beneficial for those engaging in strategic work to record meetings, to analyse how people engage as a way of circumventing unintended ways in which participation is hindered, as well as to understand how consensus is reached and where there may or may not be biases that work for or against the strategic outcomes of the organization.

7.5 Avenues for Future Research

The definition provided on what constitutes a meeting acknowledges both the physical and virtual spaces. However, *where* meetings take place provides possible avenues for future researchers to examine how preconfigured and peripheral forms of participation may or may not be prevalent in virtual meetings. Notably, virtual forms of meetings, especially where organizations have multiple locations together with their employees,

have become prominent. Such prominence provides an avenue worth investigating regarding preconfigured and peripheral forms of participation, i.e. whether they emerge or whether different forms of improvised adaptations also emerge in virtual forms of meetings.

The move to online interaction offers new avenues for virtual forms of meeting. With the advancements being made in the area of online meetings, this burgeoning environment for social interactions (whether through Zoom, Microsoft Teams, Skype, Google Meet, or any other platform) offers future researchers an opportunity to study the world as one with new digital "stages", which can be used to consider how strategic participation may be furthered and/ or accomplished. Research may include questions pertaining to the analysis of the main resources mobilized and affordances provided by online meetings in comparison to physical ones. What the rules and conventions embedded in such interactions may be, together with their intended and unintended effects, may also be worthy of consideration, as this raises further questions about participation and self-representation in online interaction.

Future researchers may consider comparing and contrasting the effects that the discursive changes have compared to embodied and material changes. This is based on the fact that there were certain practices within the thesis where the changes were led through the use of embodied resources, while others were dominated by discursive or material resources. It was not within the scope of this study to compare and contrast these, as the aim was to see how the resources are mutually constitutive to the development of the strategy process. Thus, an explorative study on each resource in comparison to the others could further develop the literature and be of benefit to practitioners.

Due to the orientation of my constructivist ontological and symbolic interaction epistemological stance, I would recommend that future researchers use discourse-historical analysis. This is because what the study results showed was that although the historical relationships people had within the organization were suspended for the away strategy meeting, they still had an influence on the interactions together with the discursive forms of access to backstage rhetoric, especially in the expositioning phase of the meeting. Because certain participants had greater access, due to their level in the organization, there were certain strategic issues that they had an advantage on in

explaining or discussions during the meeting, which excluded others because they were not present in the meetings that were being referenced. Using a discourse-historical approach (DHA), Clarke, Kwon, and Wodak (2012) found that taking the historical and wider socio-political factors of the organization into consideration affected the strategic outcomes of the strategy workshop. Thus, a DHA may be beneficial in any study aiming to understand all the underlying pre-existing relationships that participants have. Furthermore, the emergence and recurring pattern of affiliative groups amongst participants shows that even though the ranking or formalities of the organization are temporarily suspended, the relationships and affiliations that the participants have are not suspended. Thus, a better understanding and appreciation of the historical relationships shared by participants may shed light on the strategizing process and how this may enable or hinder participation. Although this was not within the scope of this research, it could potentially be an interesting lens through which to examine participation in away strategy meetings for future researchers.

In the next section, I explore the limitations of this research as the issue of research ethics was addressed in section 3.7.3 of the in Chapter 3. Taking these the ethical issues and the context of the organization I had to make important decisions during the research process in order to protect my research participants and their organization, given the sensitivity of the strategy formulation phase they were going through and the fact that I had collected video and audio data. I have taken great care to observe ethical norms and practiced reflexivity throughout.

7.6 Limitations

This study has numerous limitations, as briefly outlined above. Further examination of the constructs explored in this study may help develop the strategy-as-practice literature in the three following ways. The focus on video-ethnography (Jarzabkowski, Burke, and Spee, 2015; Paroutis, Franco, and Papadopoulos 2015) was the foundation upon which the study was based, and a dramaturgical lens was used to help with the integration of the data. I believe that augmenting data collection with interviews from participants immediately after the meeting, or asking them to keep reflective journals regarding their participation and perceived contributions in the outcome of the

meeting, would have been helpful in understanding how people perceived the role they played in the unfolding interaction. It would have provided details of moments in which they may have been participating and contributing in instances where they were not captured in the video. Again, such details may have not been interpreted as participation because they did not have an immediate and visible contribution to the outcome of the strategy meeting. For example, it would have been beneficial to the study to interview participants who code-switched during the meeting or used whispers as a form of participation to ask about the content of the whispers and the reasons behind this type of interaction.

Also, there were moments in the data where participants spoke about how they viewed the workshop and expressed discomfort with talking when certain members were in the room. It would have been beneficial to ask them why this was the case, as this could have contributed to how hindrances to the strategic participation are perceived by those who are trying to negotiate their participation within the meeting but instead found agency in peripheral participation. Such observations emanate from my informal post-meeting conversations with the SMO team which helped to provide context to the process, including their views on what participants were contributing to the outcome of the meeting. Therefore, I recommend that future studies include post-meeting interviews as part of the study and that these interviews should take place within 24 hours of the meeting if it is not possible immediately. This, together with a revision of my field notes, may have helped in identifying potential participants to interview within the meeting to get their perspective on the process and their perceived participation.

Using video-audio recording presented a plethora of ethical issues, both for the participants and for me. The video cameras were an overt form of participant observation that I felt, at times, was intrusive. Scholars argue that, once a researcher enters the field, they alter the natural state of things. I believe that my data were altered due to my presence but even more so by the camera as at times some male participants attending the meeting would jokingly remark that I should have told them that I would be coming so they could put on their make-up. Occasionally, some participants would ask for any feedback on how they interacted during the meeting. I always replied by saying that if I told them it would spoil the investigation. However, over time, the

perceived intrusive nature of the cameras decreased, although there were always comments made regarding my presence and the filming that was taking place during the meetings. As a result, I tried to hide the cameras behind plants at the start of the meetings and covered the recording button with gaffer tape when the camera was at the eyelevel of a participant. The longer the meeting went on, the less aware people became aware of me and of the cameras.

Future studies may wish to consider multiple case studies and work as a team of researchers as opposed to a single researcher. This could be done with the presence of more cameras as resources or more researchers for the observations of multiple meetings. For example, at FinCo, there were days when four departmental away strategy meeting were taking place on the same day, and even though they were at the same venue, because they were in different rooms, I could only choose two and I had to move between the rooms for observations. It would have helped to have a second person working with me for the collection of the data as well as to have a second coder in the analysis process. I would also recommend the use of data sessions as part of the analysis process. I benefited from attending numerous data sessions where other participants' data were presented and analysed by a team of researchers. The multiple perspectives were enriching and highly valuable both to the development of the analysis vocabulary of more concepts and potential theories to explain the perceived phenomena. At times, the opportunity to text the presenter biases offered them a chance to explain how they would interpret certain interactions from their perspective, revealing that there could be reasons to explain the interaction other than that I had settled on. I believe sessions like this with a team of researchers, as well as the participants, could be beneficial, particularly given the technical jargon.

7.7 Concluding Words

The thesis shows that participants used material, embodied, and discursive resources in instances where they required alternative modes of negotiating their agency within strategic participation. In these instances, they engaged in parallel or sometimes completely divergent forms of participation. In a divergent form of participation, they engaged in peripheral strategic participation. However, eventually, these two forms, in a testing form of strategizing, led to resolutioning, which contributed to the

adaptation made to the strategy. Conversely, and in an iterative form of strategizing, what can happen is that participants negotiate various stances in relation to the strategic point of focal prominence, but no resolution is made and it is either omitted from the changes in the strategy or remains an unresolved matter.

The thesis contributes to the strategy-as-practice literature by showing how the strategy process unfolds through the interlacing of its material, embodied, and discursive elements. It demonstrates that the practice of strategy does not take place in a single, confined, homogenous form of participation but over various forms of participation. This is accomplished through embodied interactions between participants within teams who temporarily include and/ or exclude certain members.

Furthermore, this thesis responds to the call made by LeBaron and Whittington (2011), who suggested that strategy-as-practice scholars should move beyond looking at discursive resources used in strategic work and look into the use of embodied *and* material in the accomplishment of strategy work (see also Dameron and Le, 2015). The thesis builds on the work done by Jarzabkowski et al. (2015) and the suggestion that one should examine multiple resources in the engagement of strategic work. In this chapter, I consolidate the insights gained from the findings and the observations made in the discussion chapter as I foreground some of the theoretical and empirical contributions made by this study in advancing what we know about strategic participation.

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APPENDIX A: PARTICIPANT INFORMATION SHEET

Date: _____

Research Study Title: Strategizing and Embodied Interaction

Introduction

My name is Nobulalu 'Lali' Dangazele. The above-mentioned study forms part of my doctoral research requirements at the University of Warwick, England. As a member of the Bank's top management team, you are invited to take part in this study. Before you agree to do so, it is important that you understand the purpose and nature of the research and what your participation will involve. Please read the following information carefully, and ask if anything is not clear, or if you would like more information.

What is the purpose of the study and how will it be carried out?

The primary aim of the study is to observe how we 'practice' or 'do' of strategic work at the bank. I will focus is on how members of the top management teamwork during strategy meetings / workshops and how these sessions influence the overall strategic work done at the bank.

The research objectives are:

1. To study how top management teams, work together to formulate, implement and evaluate the strategy;
2. To observe interactions between team members, the tools, objects and artefacts used while strategizing; and
3. To offer insights on how top management teams may use the research findings to the benefit of the practice of strategy in the work they to.

Why have I been invited to take part?

As a member of the bank's top management team, you play a key role in the organisation's strategy and this has led to the request for your participation in the study.

Do I have to take part?

Participation is entirely voluntary. If you do agree to take part, you will be asked to sign a consent form allowing me to audio-video record discussions taking place during the strategy workshops and meetings. You may still withdraw from the study at any time, without giving a reason.

What will taking part involve?

The research will involve and audio-video recording of your participation in the strategy meetings and workshops taking place at the bank. I can assure you that I will make every effort to ensure that the study does not disrupt the working environment.

Will my participation be confidential?

Yes, all information collected during the study will be kept strictly confidential and stored in accordance with the University of Warwick's data protection and ethics committee policy.

What will you do with the results of the research?

The results will be incorporated into a PhD thesis, parts of which will be presented in an academic journal. The organisation will be kept anonymous and no participant will be named and visual data will be blurred thus making individuals in the image unrecognisable.

What happens next?

If you wish to have any questions, complaints or comments on any aspects of how you have been approached or treated in respect of this research study, please contact:

The team of supervisors advising me on my research consists of:

- Professor Haridimos Tsoukas PhD, is a Professor of Organization Studies and currently Academic Advisor to the Hellenic Association of Chief Executive Officers.
- Professor Jonothan Neelands PhD, DSc is an Associate Dean for Creativity at WBS. He is a National Teaching fellow, Professor of creative Education at the Warwick Business School (WBS) and Chair of Drama and Theatre Education at the University of Warwick.

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If anything is not clear, or if you want more information, please do contact me:

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