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LEARNING TO STRATEGISE: PROBLEMS OF PRACTICE

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Editor's Foreword

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Abstract:

This paper introduces a pilot study from a wider research project on how company directors learn to strategise. The problem of strategy learning is framed within a conceptualisation of strategy practice as both micro and macro phenomena. This dual framing helps explain both the formalistic nature of strategists' learning and their difficulties in putting their learning into practice. The paper concludes by outlining a proposal for further research and inviting suggestions.

Work in progress.

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Learning to Strategise

I have been teaching ‘strategy’ for about a decade and a half. Only recently have I begun to ask myself how people learn to strategise. This paper is a step towards bringing teaching and learning closer together. It is only a small step, and I shall be asking your guidance in taking it further.

My interest in learning to strategise springs naturally – if rather belatedly – from my activity as teacher. But not only that. A concern for practitioner skills also fits centrally within a developing general concern in organization studies for strategy as a social practice (Whittington, 1996; Hendry, 2001). The field is becoming increasingly interested in strategy work, its tools and its workers. Part of the purpose of this paper, therefore, will be to situate the problem of learning strategy within the general frame of practice. It will do this first by introducing broadly three central themes within the current theories of practice, highlighting particularly the linkage between the activities of the person and prevailing behaviours in the wider social community. These two poles, of the person and the social, will be captured by the differentiation between ‘practice’ in the singular and ‘practices’ in the plural. Each of these will be contrasted with the contemporary ‘process’ tradition within strategic management.

This linkage of micro practice and macro practices is critical to two tendencies that this paper will identify as the ‘practical turn(s)’ within strategy thinking in recent years. On the one hand, there is a developing interest in the micro-strategising activities of actors within organizations. This is often a matter of turning the spotlight to pinpoints within organizations. On the other hand, there is the more macro interest in the rise and fall of particular management practices and strategies within the wider business community. Here the light is very diffuse. Part of the argument of this paper is that we can do more to assert the interdependence of these two levels. As we shall see, the articulation of the macro context and micro strategising is a central problem in learning to strategise.

In approaching the problem of learning to strategise, I shall be drawing upon the recent ‘communities of practice’ literature (Lave and Wenger, 1991; Wenger, 1998).

The emphasis on teams, on identity and practical skills are highly sympathetic to the problem in hand. But results from initial pilot research with senior strategists raise some issues about the adequacy of this tradition to the rather amorphous problem of learning to strategise. In particular, it will be argued that there is an ambiguity about the relevant and primary community of practice for these strategists. The issue of appropriate community was previously partly obscured in many of the community of practice studies by their focus on the specificity of their actors' organizational jobs within the wider social world. The micro-macro link that exists between strategy practice inside organizations and strategy practices within the wider world, however, is a critical one. It helps explain, moreover, two quite surprising preliminary findings from this pilot work: the professed importance of formal tools and learning for these strategists; and the frustrations involved as they take on organizational roles as strategy teachers as well as strategy learners.

The paper takes the following structure. The next section introduces some of the broad theoretical literature on practice, identifying the three central themes of persons, learning and the social, and indicating their relevance for strategy. The next section deals directly with strategy, developing the two key turns towards strategy practice and strategy practices. These are each positioned vis-à-vis the process tradition in strategic management. The following section introduces the community of practice literature, noticing the quite confined communities that have typically been dealt with so far. As we continue with the discussion of some preliminary empirical work, we shall focus on the problems for strategy practitioners raised by the dislocation of macro practices from organizational practice. The conclusion discusses some of the issues for strategy learning that have emerged so far, while drawing attention to the limitations of the research at this stage. I end, therefore, with a sketchy proposal for further work and an invitation for comment and suggestions.

The Theory of Practice

The notion of practice has recently taken increasing prominence in management studies, including the fields of technology (e.g. Orlikowski, 2000), learning at work (Wenger, 1998), accounting (Hopwood and Miller, 1994), organizational structure (Whittington, 2001) and strategy itself (Whittington, 1996; Hendry, 2000). The notion is a highly suggestive one, casting sudden light on aspects of management that were previously barely perceptible and widely ignored. It also draws on some deep theoretical traditions. To be sure, a good deal of practice theory's suggestiveness derives from how it can be interpreted in many different, even divergent, ways (Schatzki et al, 2001). Nevertheless, here we shall draw out from these various interpretations of practice three quite common features: a concern for people and their activities, rather than for organizations and their collective properties; as corollary, a concern with the skills and learning involved as people go about their activities; and, as corrective to any slide towards individualism, an assertion of the fundamentally social nature of people's activity, skills and learning. This section will elaborate each of these three features, pointing to their general implications for strategy and its learning. The subsequent two sections will tackle strategy and learning from practice perspectives more directly.

In an important review of the increasing role of the practice notion in the social sciences, Ortner (1986: 149) gave as definition of practice simply 'anything people do'. The scope is alarmingly wide, but strongly implied is the need to re-embrace the micro activities of ordinary people – what de Certeau (1984) has called the 'murmurings of everyday life'. Thus de Certeau and his students attend to such ordinary activities as 'doing cooking' and 'doing shopping' (de Certeau et al, 1998). Understanding these activities involves sensitivity to the personal biographies of the actors involved. It also carries with it an appreciation of the individual tricks and stratagems required in the daily business of 'making do' within constrained and shifting circumstances. As Giard (1998: 156) says of 'doing cooking': 'each operator can create her own style according to how she accents a certain element of practice, how she applies herself to one or another, how she creates her personal way of navigating through accepted, allowed and ready-made techniques' (emphasis in the

original). Translating from the domestic sphere to the organizational, this kind of practice approach encourages us to focus on workers and their ordinary, day-to-day work. At the level of strategy, we become concerned with who strategists are and what strategists do.

This appreciation of the tricks and stratagems necessary to ‘making do’ highlights the practical skills required in getting through everyday life. Many of these are elusive to traditional science. De Certeau (1984: 73) makes of the tightrope-walker his example: the tightrope-walker’s practical performance relies little on the precise measurement of the height or length of the rope, more on semiconscious, tacit skills that come from years of experience. For Bourdieu (1980: 177), practical sense entails the capacity for instantaneous reflex actions that respond to the demands of each unique situation without conscious calculation or appeal to precedent. It is these tacit skills and capacities that sort out the effective practitioner from the ineffective.

How well these skills and capacities are learnt, and by what processes, becomes critical to success. For Bourdieu (1980), they come from the past experience that constitutes the practitioner’s ‘habitus’ – the accumulated schemes of perception, thought, and action derived from their pathway through life. Acquisition of the tricks and stratagems necessary to effective practice, therefore, is not something that relies a great deal on formal learning, more on participation, or at least observation, of the activity itself. ‘Agents can adequately master the *modus operandi* that enables them to generate correctly formulated ritual practices only by making it work practically, in a real situation, in relation to practical functions’ (Bourdieu, 1990: 91). Learning may not even be conscious. Giard (1998: 153) describes how she learnt to cook, despite her adolescent resistance to traditional female tasks, simply through co-presence in her mother’s kitchen: ‘surreptitiously and without suspecting it, I had been invested with the secret, tenacious pleasure of doing-cooking’. As we shall see, this emphasis on the informal acquisition of skill has become important to the study of work-place learning. It would also imply a marginal relevance of business school teaching to strategy practice.

This emphasis on learning through participation or observation brings out the social character of practices, even if they are continuously interpreted individually according

to personal styles and shifting circumstances. For de Certeau (1984: xi) practices are socially established 'ways of operating or doing things'. While celebrating the achievements of the ordinary person, he is categorical about the priority of the social: 'Analysis shows that a relation (always social) determines its terms, and not the reverse, and that each individual is a locus in which an incoherent (and often contradictory) plurality of such relational determinations interact' (de Certeau, 1984: xi). Again in the domestic sphere, Giard (1998: 157) writes: 'doing-cooking is the medium for a basic, humble and persistent practice that is repeated in time and space, rooted in the fabric of relationships to others and to one's self'. Even activities done alone, such as cooking the family meal, are ultimately social. However solitary it may be in itself, family cooking draws on shared technologies, shared expectations of the appropriate, and aims to please a social group. The same stress on the social has been drawn into the study of work-place practice: Wenger (1998: 57) insists that even the lonely evening preparation of slides in a hotel bedroom for the next day's presentation has a fundamentally social meaning. Strategy work too has this fundamentally social character, relying upon not just individual inspiration but effectiveness within social groups – fellow managers and employees.

The simultaneous attention to what practitioners actually do and the social character of the practices they are involved in points to an ambiguity inherent in the practice notion (Schön, 1983: 60). The term practice can seem to refer both to regularised modes of operating and to the manner in which these modes of operating are enacted in particular circumstances. Turner's (1994: 8) distinction is helpful here. He reserves practice in the singular to the particular activities of goal-seeking actors. Practices in the plural, on the other hand, refer to the socially-defined modes of operating - customs, rules, tacit knowledge and explicit technologies - that inform these activities. Practice, then, is the application and interpretation of practices. The ambiguity reflects the two faces of the same coin. We are close here to Giddens' (1984) notion of the duality of action and structure in social life: structural rules are drawn on, reproduced and developed in practical activity. Practice and practices are implicated in the same kind of mutual dependence.

The Practical Turn(s) in Strategic Management

Within contemporary strategic management, we can trace emerging concerns with both sides of the coin – that of micro practice and that of macro practices – even if they do not always characterise themselves in these terms. This section introduces these two ‘practical turn(s)’, emphasising the importance of their interdependence and then positioning them in relation to the related process approach to strategic management.

Figure 1: Strategy as Practice

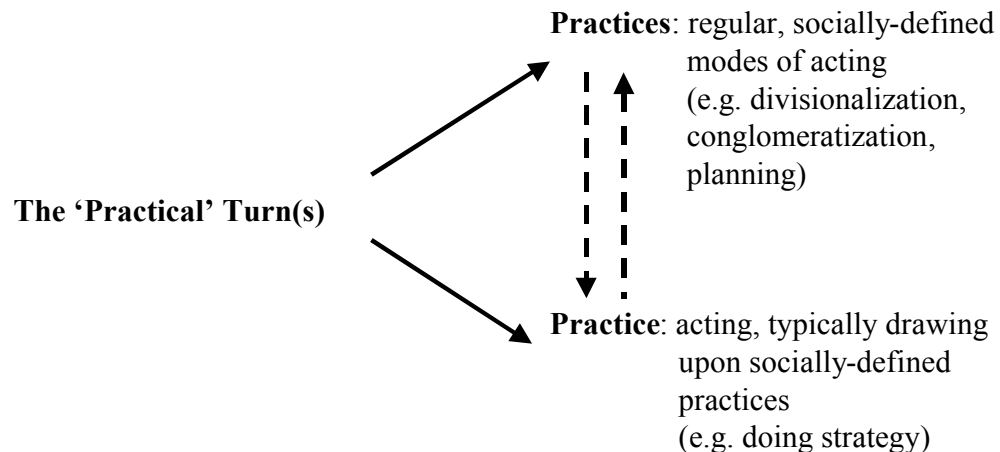


Figure 1 both summarises the two main thrusts of strategy’s practical turn(s) and seeks to hold them together. The first thrust has been the increasing interest, within organization studies broadly but also within strategy in particular, in the emergence and diffusion of particular concepts and techniques in popular managerial discourse (Abrahamson, 1991; Barley and Kunda, 1993; Mazza and Alvarez, 2000). Sometimes dismissed as ‘fads and fashions’, they are not without practical effects for all that.

They codify and legitimate particular managerial practices in a manner that makes for easy diffusion and implementation. In the strategy field, for instance, we can track the mid-twentieth century concepts of divisionalization and diversification (Fligstein, 1990; Davis et al, 1994). Not only did these become the prevailing concepts of the corporation at particular points in time; they seem to have been realised in action, as documented by historical trends in strategy and organizations amongst large American and European firms (Fligstein, 1990; Whittington and Mayer, 2000). These practices were put into practice.

Strategy practices are thus linked to strategic practice, the focus of the second development within the field. There has recently been an increasing fascination with the micro-strategising activities of managers in their very local contexts (e.g. Johnson and Huff, 1998; Jarzabkowski, 2001; Maitlis and Lawrence, 2001; Mezias et al, 2001; Rouleau, 2001). Here we are beginning to uncover the activities of real managers doing real strategy work – producing documents, having meetings, managing away-days. These strategists' talk and lives are now up for intimate analysis (Samra-Fredericks, 2001; Watson, 2001). This is strategy in practice.

What is absent from some of these discussions of strategy practice is a strong sense of these micro-strategising activities as drawing on a wider set of strategy practices. Practice relies heavily upon the shared concepts, technologies and assumptions of the strategy community quite broadly. Meant here are all the strategy tools, discussion formats and presentational software that are the routine stuff of strategy work. We shall see that this reliance of practice on practices is an issue particularly for the strategists that I shall describe later. It is important, therefore, to keep the two aspects of strategy's practical turn(s) tied together. The strategy practice that the recent micro-strategising accounts describe in such rich detail depends upon the practices charted in the macro-accounts of fads and fashions in the wider managerial environment. And, of course, it is through the practice of routine implementation, fortuitous accidents or deliberate initiative that these practices are produced and reproduced. The normal resource constraints of research might encourage us to focus on one side or other of the practice-practices duality – and this is what researchers on either side rather tend to do - but we should be conscious of this as a deliberate and ultimately provisional 'methodological bracketing' (Giddens, 1979).

The contrast between the macro-tracking of strategic practices and the micro-studies of strategising practice implies a broad sweep for the practical turn(s). It would be as well to distinguish them from the other powerful and sympathetic current in strategic thinking, the process approach (Chakravarthy and Doz, 1992; Pettigrew, 1992; Pettigrew, 1997). Table 1 contrasts the process approach with those of both practice and practices, taken separately.

Table 1: Comparing Process with Practice and Practices

	Process	Practices	Practice
Analytical Level:	Organization	Technologies	People
Reference Points:	Competitors	Competitors	Colleagues
Key Questions:	How	What	How
Explanatory Variable:	Profit	Diffusion	Effectiveness
Orientation:	Meso Explicit/Tacit Local Change	Macro Explicit General Cycles	Micro Tacit Local Routine
Empirics:	Politics/Culture	Concepts/Tools	Words/Actions
Research Mode:	Case	Quantitative	Ethnography

The key contrasts concern the levels of analysis and the explanatory or dependent variables. In the first place, the prevailing level of analysis in process research is typically the meso level of the organization – whether a corporate whole or some business or departmental unit within that whole (Whittington, 1996). Practice, on the other hand, goes further inside: it is ‘the internal life of process’ (Brown and Duguid, 2000: 95). Processes are the collective property of organizations; practice is the micro-activity of people. At the same time, the notion of practices takes us potentially far beyond the organization. It embraces the practices of the organization – as embodied in its culture or routines, for instance – but points also to the macro environment within which practicable concepts and technologies are defined. This macro environment is captured in Pettigrew’s (1985) notion of context, but in the practices approach it is made central rather than contextual. In sum, the processual approach sits between the levels of practice and practices, in respect to both of which the organizational is somewhat incidental.

This differentiation of levels, of course, connects to the nature of what the practice and practices approaches are trying to explain. The key dependent variable in strategic management is organizational performance, typically measured by profitability (Schendel et al, 1994). The process approach comes within this, concerned for the organizational performance implications of change or decision-processes, for instance. The study of managerial practices, on the other hand, aims to uncover the emergence and diffusion of particular concepts or technologies – in strategy, diversification, divisionalization or planning (Fligstein, 1990; Davis et al, 1994; Morrison and Wensley, 1991; Haspelagh and Jemison, 1982). The concern is with the spreading power and staying power of particular practices. By and large, there is considerable scepticism about the impact of these practices upon organizational performance. At the other end, however, the practice approach is concerned with the personal effectiveness of the practitioners engaged in their practice. Bourdieu (1980) in particular is keen to explain not the anthropological system but what it takes to be an effective player in such a system – ‘le sens pratique’. Equally, the practice approach to strategy would focus on the skill and success of particular strategy practitioners in achieving their ends in strategising – getting their proposals adopted and resourced, for example – while remaining somewhat agnostic about implications for organizational performance. A practice approach to strategy concentrates on helping the players of the strategy game rather than the organizational owners of the game’s resources.

The essential contrast between the two practice approaches and the processual lies, therefore, in their relative indifference to the organization as both level of analysis and object for improvement. From this flow many of the other distinctions indicated in Table 1. For the processual approach, the reference point is performance against competitors in the same product market. For practices too there is a competitive element, but here typically the competition is that between rising and falling strategy concepts and technologies. At the level of strategising practice, the point of reference are colleagues within the managerial team, competing certainly with their proposals but also bound in group relationships that shape the nature of what will or will not succeed among themselves. Both process and practice approaches are concerned with the ‘how’, but the first with how organisations decide or change, the second with how strategy practitioners do what they do. With practices, on the other hand, the focus is

more on the ‘what’ – what concepts and technologies are prevailing at particular times and places. The tracking of competing concepts and technologies within the macro-environment typically calls for quantitative research. Both the process and practice approaches tend more towards the qualitative, the first through single or comparative cases of organisations (Johnson, 1987; Pettigrew, 1985; Pettigrew and Whipp, 1992), the second predominantly through the more ethnographic approach of traditional or urban anthropology (Bourdieu, 1980; de Certeau, 1984).

In sum, the practical turns in contemporary strategy thought puts the spot-light to new phenomena – on the one hand, the shifting character of accepted strategy practices within society as a whole; on the other, the very particular nature of strategising practice in micro-situations. The two are fundamentally connected, even if the exigencies of research may lead to one being bracketed in favour of the other. In orientation, they tend to go either above or below the predominantly organizational level of the processual approach. The practical and the processual are not far apart, of course, as strategy is practised within organizations and some strategy practices may be idiosyncratic to particular organizations. But the practical turns imply a concern for practitioners’ and their learning that does go beyond the ordinary scope of processual research. The next section will introduce the ‘communities of practice’ tradition that promises particular relevance to the problem of how strategists learn.

Strategy and Communities of Practice

The communities of practice tradition has won increasingly acceptance as an appropriate and insightful approach to understanding learning within organizations (Fox, 1997; Richter, 1998). Its chief exponents explicitly acknowledge their roots in theorist such as Bourdieu and Giddens (Lave and Wenger, 1991; Wenger, 1998). Their accounts of learning, moreover, resonate strongly with the themes of the practice tradition more widely, particularly in their concern for people rather than organizations, tacit skills rather than formal knowledge, and the importance of the social. This section introduces the communities of practice literature and its implications for strategic learning. It will also anticipate some problems, in particular its rather confined notion of the social.

A community of practice exists where practitioners engage mutually in some joint enterprise by means of shared repertoires of discourse and behaviour (Wenger, 1998). These communities include families or church-members, but in the work-place cover such groups as insurance clerks within an insurance company (Wenger, 1998) or service engineers within a division of a photocopying company (Orr, 1996). Learning in the context of these communities means increasing participation in the practices of the group. It is social in involving not just individual gains in cognition, but membership in the community. Learning involves shifts in identity: ‘The central issue in learning is becoming a practitioner, not learning about practice’ (Brown and Duguid, 1991: 48; emphases in original). There is thus the dual concern for the individual and for the social characteristic of practice theory more widely. Lave and Wenger’s (1991: 52) insist on ‘a very explicit focus on the person, but as person-in-the-world, as members of a socio-cultural community. This in turn promotes a view of knowing as activity by specific people in specific circumstances’.

Here there is the same emphasis on the informal acquisition of barely conscious skills through practical experience as in Bourdieu (1980) or Giard (1998). Rather than abstract principles, it is the details of actual practice that determine success and failure (Brown and Duguid, 1991). As formal education struggles to grasp this practical detail, apprenticeship and practice are key (Lave and Wenger, 1998: 94-96). It is through close observation and accumulating participation that practitioners learn to become full members of their community: Schön (1984) terms it ‘learning by contagion’. Formal education has a minor part. Brown and Duguid (2000: 134) explain the relative roles of the explicit and the tacit in forming a negotiator: ‘Strategy books don’t make you a good negotiator, any more than dictionaries make you into a speaker ... To become a negotiator requires not only knowledge of strategy, but skill, experience, judgement and discretion. These allow you to understand not just how a particular strategy is executed, but when to execute it. The two together make a negotiator, but the second comes only with practice’. The tone leaves little doubt which is senior and which is junior in the relationship between the formal and the informal in practical learning.

In terms of research method, the community of practice's emphasis on the details of actual practice tends to entail close ethnographic or semi-ethnographic observation. Thus Lave (1988) follows the practitioners of supermarket maths back with their shopping into their kitchens. Orr (1996), formerly a photocopying engineer himself, accompanies his engineers on their rounds and sits down with them during their breaks. Wenger (1998) worked at his own desk amongst his insurance clerks. Revealed thereby are the personal tricks of addition, the quirks of machines and the peculiarities of claims forms. Knowing these kinds of tiny details constitute the membership of respective communities and make the difference between personal effectiveness and incapacity.

All this is richly suggestive for the study of learning to strategise. At least in theory, strategising work does take place within teams of interdependent managers with strong group identities. There is a long recognition that effective strategy relies upon detailed knowledge of particular organizations and markets rather than general abstract principles (Abernathy and Hayes, 1982; Mintzberg, 1994). Indeed, strategy may best be seen as simply a 'craft' (Mintzberg, 1987). We know that many effective strategists have never been to business school. The emphasis on the communal, the detailed, and the informal implied by the communities of practice tradition accords well with what we might expect of strategy. This is a good place to start.

Yet there are some reservations. Richter (1998) points out that the communities of practice literature has typically studied quite simple and crisply defined practices: clerking, servicing, checking. Managerial work is typically much more diffuse and complex. The same is true in spades for strategy. To start with, we do not know how to define the word (Whittington, 2000; Porter, 1996; Mintzberg et al, 1998). Whatever it is, we can be fairly sure that strategising activity doesn't take place in definite locales and at definite times. The practices that the literature has previously followed took place in supermarkets or offices during working-hours. Strategising takes place in meetings, over dinners, in cars and in bath-tubs. We cannot, and would not want to, follow strategising activity quite that far. If we take seriously the notion of strategy emerging middle-up-down (Nonaka, 1988), we cannot even be sure who the strategists actually are. From that point of view, at least, they are not likely just to be the senior management team. Indeed, the community of strategy practitioners is a

highly imprecise and extended one, again unlike the engineers servicing the particular machine types of Xerox (Orr, 1996) or the clerks handling the procedures of a specific insurance company (Wenger, 1998). The practices of strategy are generated by the leading firms, consulting firms and business schools of a wider social world that extends far beyond the confines of a particular team or even organization. Learning to strategise has a plural sense, then: at its narrowest, it may mean effective participation in the strategy practice of a particular management team; at its widest, it also means participating in the wider community of strategy through mastery of the shared repertoire of concepts and techniques.

The communities of practice literature thus provides an intriguing but not unproblematic starting point. Lave (1988) chose shopping maths as her topic explicitly because of its highly structured nature, incorrigible lexicon and easy recognisability. Strategising is not going to be so easy.

Learning to Strategise in Practice

This section introduces some initial pilot work on how senior managers learn to strategise. This pilot work is still in progress, with for example full participation in an Institute of Director's three day Business Direction course still to come in June. At this point, however, I have carried out four semi-structured interviews with managers at director or near director level, each tape-recorded and about 60-90 minutes long. I have also facilitated a ninety-minute panel discussion of strategising and learning to strategise with four other director-level managers, again tape-recorded. Five out of these eight managers were chairmen, chief executives or managing directors. All but one of the managers were working in small to medium-sized enterprises, though two of these also had extensive experience with larger public companies. As a result of the Institute of Directors' link, six of these managers were graduates of the Institute's Master's degree in Business Direction. None had done an MBA, though one had done an undergraduate accounting degree and two short executive courses. Most had some other professional qualifications: two were Chartered Accountants. This is a small and particular sample of strategists and I shall return to some biases later on. But - interested, knowledgeable and reflective – these strategists certainly had relevant

things to say. It is the articulation of micro practice with macro practices that will be a particular theme here.

First, a word in defence of my chosen level. It could easily be objected that this focus on directors is too exclusive: it misses a good deal of the micro-strategising at the periphery of the firm (Huff and Johnson, 1998). This is possibly true, but might easily be overstated. Myself, I think we are over-due for a reaction against the presumption of strategic emergence rather than formal planning dominant over the last decade or so. My strategists came from smallish organizations too: there isn't much periphery. Anyway, the directors in question here could be emphatic that it was they who had the ultimate responsibility for strategy. Said one: 'You involve the managers and everyone as much as you can. You discuss what you can with them. But I don't think that anyone who is not a director can really full strategise. They (directors) are the only people in the organisation who really have a chance to free their minds from the operation... I think it is only the Board who can do it'. Another director acknowledged how strategies could emerge: 'things can take place operationally that become your strategic direction, because of the wonderful fit. Its something that comes up, its developed and it fits beautifully. It just works its way in and the next thing is its strategic'. But she went on to insist that even such initiatives had ultimately to be endorsed by the Board: 'Finally you have to get that sort of agreement'. This is not to arbitrate on whether strategy is seen best as planned or emergent; rather just to establish that the directors and senior managers treated here are key participants in strategising.

Still, strategising is not a major part of their activity. Formal Board discussions of strategy within this group ranged from monthly, to quarterly, to annually, to not at all. Observed one director: 'Meetings tend to get very, very operationally driven – how about Johnny in South Yorkshire and stuff like that. You get to about four hours and you're absolutely knackered and you haven't got to anything strategic, addressed the business plans, or anything you're supposed to have done'. At one of the companies where the formal process was most absent, strategizing was an activity to a large extent done singly by the chairman: 'I do sky-diving and sky-diving in the UK is not recommended. You spend a lot of time waiting for the weather. And that's when I do

my strategising'. Otherwise this chairman would talk strategy with a friend, a fellow alumnus of the Institute of Director's Masters course.

In the terms developed earlier, therefore, strategy practice amongst these senior managers was quite limited. Yet these managers were well versed in the prevailing practices of the strategy community at large. They defined strategy in different ways, but always very conventionally. Strategy was: 'the long-term' (most often), 'matching resources to opportunities', 'where you want to go' and simply 'leadership'. They also talked familiarly about some of the key concepts – vision and mission, competitive advantage and value-added – of the standard strategy discourse. They indicated variously a good deal of experience in the basic technologies of strategising work – such as flip-charts, Powerpoint, brain-storming, mind-mapping, benchmarking, away-days, workshops, steering groups or task-forces.

A few were quite sophisticated in these technologies. One talked about his use in the initial strategy meetings of first a simple value-added matrix and then of exemplary case studies from within the organisation: 'People could suddenly see where we ought to be going (with the matrix). The visual really helped. People really started to visualise.... The second meeting also had lots of case study examples of greater value added... Pretty boring ... but people had to have something to understand, something to get a grip of'. Another with experience in construction artfully turned his project management techniques to structuring his away-day strategy process. Amongst these small to medium-sized firms, however, there was little reliance on elaborate, formal strategic plans. Where present at all, these plans were a few pages long. The most original was a virtual plan, which was continually updated as it circulated electronically amongst the strategy steering group.

But if formal strategy documents were not very important, formal strategy tools often were. One, speaking of Strengths, Weaknesses, Opportunities and Threats analysis, remarked: 'I'm constantly SWOTing things. No matter what it is, you can SWOT it. I do two or three SWOTs a day'. For another, such formal techniques as SWOT or Porter's Five Forces had become fully internalised: 'Having used them probably twice in a formal way, I would say that after that they're in your head. You don't write it down, you sort of see it in your head. It becomes a way of thinking rather than a tool'.

The tools were seen as important as a means of starting processes off. Observed one: 'We are doing your Porters and your PESTs. We are running these models alongside the (strategy) process, to help build the plan. There are a number of big issues coming out of it. ... If you work through the models, it does help pull out some of the issues'.

These tools had an ambiguous role in the management team. For some, they provided a common vocabulary. In the words of one: 'Of course, when you use the tools, the point is that you are using them as a team. By the time you have finished, you all agree that this is what the business is. So it (using tools) gives you a collective understanding of the business, so you're all singing from the same hymn sheet, you've all got the same understanding'. In one sense here, formal tools were being used to constitute the organisation's own community of strategy practice: they became the shared repertoires of the group. But in another case, the tools were hidden and exclusive, the property of those with access to them from the wider community of strategy practitioners. The sophisticated user of matrices and case studies above admitted: 'I wouldn't sit down and do Porter's five forces with what we've got, a fairly weak management team. Very good operationally, very good functionally, very poor strategically. I'm doing it (the tools) on my own, and with Bill (an outside consultant). Not an ideal situation'.

This recourse to an outside consultant, or earlier to a fellow alumnus, points to the indeterminate nature of the primary community of strategy practice. For some, this was effectively the Board or top management team. But for others, it extended to – or was even constituted exclusively by – the community of practitioners outside the organisation itself. This diffused sense of community had radical implications for how strategists acquired their (acknowledged) skills. It also raised issues of strategic learning within the community narrowly defined as the top management team.

Because the community of strategy practice in at least one sense extends far beyond the boundaries of the organisation, and because any particular organisation could be quite poorly placed within this wider community, strategy learning did not appear to have the same dependence on the informal, the experiential and the apprenticeship as conventionally stressed in the communities of practice literature. There was little talk of master-apprentice relationships: one director did emphasise the importance of a

senior manager in his first strategic role, but more in the sense of giving political support rather than specific advice. Interaction with consultants or colleagues with an MBA training could be influential, but these did not have the sustained and hierarchical character of the master-apprentice relationship. Accumulating experience was important too to some. One commented that 40-50 per cent of what he had learnt formally on the Institute of Directors Master's course was already implicit in the standard procedures of the large public company he was working in. Even this leaves a gap, and it seems that experience was necessarily complemented by more formal skills. For another director, the experience of developing a divisional plan for the first time was 'a key point in my learning – it's a bit subconscious. It was gut instinct partly, and also some of the skills I'd picked up on the (Institute of Directors) course, and also the push from some of these big clients'.

There was a lot of learning from outside, both through formal courses and other semi-structured sources of external knowledge. Many of these managers participated in various fairly self-conscious business networks, with formal talks and exchanges of experience. In one case, the formal strategy auditing process of the European Foundation of Quality Management was particularly insightful. A whole array of gurus and books were mentioned – Handy, Drucker, Harvey-Jones, Hamel, Prahalad, Kaplan, Peters, Welch, Gates and, most often, Johnson and Scholes. There was of course a readiness to admit the detachment of books from everyday reality and their inadequacy on their own. Nevertheless, one director (not on the Masters course) happily said: 'I like the academic side of it. Its extremely stimulating reading, this stuff. You know, it might be very sad, but I actually enjoy reading "Exploring Corporate Strategy"'. Another director described reading Johnson and Scholes as 'an absolute breakthrough'. Books had such salience that one director simply responded to the question of how he might have learnt strategy without a course: 'Buy a book'.

Formal courses, however, were also granted very great importance. For one, meeting on a short executive development programme other young managers from within his large diversified business was a revelatory experience: 'This is when the strategy framework started to come together. You met people from all the other parts of the business and you realise how big the business you're in really is... You start to open your eyes to what's happening in the economy, globally and so on. It really did open

me up'. For another too, it was a course that started strategic thinking up from scratch: 'Strategy wasn't on my agenda at all as a new director. My concern was increase in sales and market share. It was only really by doing the IoD diploma that I became really aware of strategy and looking at the whole strategy for the company. And that made me aware that there are things that we needed to attend to, otherwise we are going to build up sales and the whole thing would fall down because there's nothing behind it'. Another director working in a multinational admitted: 'I'd never really considered strategy as such until I had some formal training. All the issues facing the business, I'd never recognise without formal training. Its obvious looking at colleagues - and at international colleagues - who have had no training, that they don't think strategically'. In short, formal cognitive development through books and courses were substantially more important to learning strategy than a good deal of the communities of practice literature might lead one to expect.

In one sense, though, formal training courses did respond to the need to develop personal identity stressed by the community of practice tradition - but they did so in relation to the failure of the organisational communities themselves. For several of the directors, personal confidence was a key benefit of going on various external courses. As one director summed up a stage of the panel discussion amongst fellow alumni of the Masters course: 'the one thing we've got in common is the confidence we have got from the course, that we are doing the right thing'. The managers gained the confidence to assert the importance of strategy even in the face of their immediate community's indifference. One director pointed to how the course had helped him insist on strategy with his Board: 'With it came a confidence to believe that these were the issues, and that you were using your time as a director effectively, concentrating on those. Without that (course), you could still have been wondering, maybe, is this really what I should be doing'. In other words, these formal courses compensated for the inadequate exemplary and experiential roles offered by the organisational communities in which strategy should have been practised.

Indeed, these top management teams were often more of a barrier than source of skill and knowledge. Very many of these directors expressed considerable frustration at their colleagues. Complained one: 'it is very frustrating for me in this environment. The problem is the Board - none of them are thinking strategically. Its like carrying

around a wardrobe with you'. Another admitted of his team: 'This strategic thing, its off the map for them really'. Managers were acutely aware of the need for a common community, but either their management teams were deeply deficient or their own training had actually detached them from the shared repertoires of their colleagues. This was felt as a real loss: 'what's important in the strategy process is the team has got to be with you'. There was a desire for community, but a widespread sense of its absence.

Amongst this group of strategy learners, then, the most pressing problem was not felt to be the absorption of the organisational community's practice but the transfer of the wider strategy community's practices into the organisation. They were not learning strategy, but teaching it. Here there was a great deal of bafflement. 'There's nothing wrong with the concepts – excellent. There's nothing wrong with the books – excellent. The difficult bit is transferring those ideas on to the Board. Just one individual has to be truculent and its an excuse for all the others'. The director who complained of his Board as a wardrobe admitted his efforts were failing: 'When I talk about the balanced score card, they don't know what the hell I'm talking about. If I try to explain it ... they don't have any idea, their eyes glaze over. Its no good giving them a book to read, or this to read, because they've got to understand what it is in context ... It's a mindset. You can't have an effective discussion with people who are completely locked'. These two frustrated directors were from family companies, the first senior, but the second a generation younger. Another recently promoted chief executive in a less family-dominated company felt he was gradually making progress with his management team by means of regular strategy steering group meetings and his electronically circulating strategic plan: 'I'm constantly drip-feeding them. The only way I'm communicating the strategic approach is by continually updating the business plan, throwing it out every other month, getting them to read it and absorb it... They're slowly responding to it now'. The approach here was not confrontational, but remorselessly incremental.

As these directors characterise it, therefore, strategy learning originates in good part outside their particular organisations. Concepts and tools such as Porter or SWOT are practices that they learn externally and try to draw into their internal practice. For these directors, becoming a strategist does not involve moving towards fuller

participation in the existing practice of the organisational community. Local experience was inadequate; local masters very few. For this reason, they expressed a great deal of reliance upon formal learning processes, through books and training. Greater participation in the actual Board community actually worked against strategic learning. The young director in the family company above feared that as he got sucked in, his strategic orientation was becoming increasingly dampened: 'its so frustrating, you start to lose interest really'. Strategy could be unlearnt as well.

Conclusions

This paper starts from an orientation towards practice and practitioners. It is people that I teach, not organisations. Besides, this orientation has rich theoretical resources and has the potential for a large and distinct agenda. Strategists, their work and their tools are relatively unbeaten paths.

The framework of Figure 1 has emphasised the interdependence between the micro-strategising of strategists in practice and the practices which they draw on, reproduce and, perhaps microscopically, develop. It highlights the potential synergy of two presently quite disconnected but compelling streams of work. It asserts a notion that strategising as activity is highly dependent upon social context. Strategists seek out a community in which to practice, and, even when done solo, draw upon the strategy practices that prevail within the wider society. Strategising is social.

This interdependency of the micro level of strategising within organisations with the wider world of strategy practices also helps explain some of the surprising if tentative findings of this preliminary research. While practice theory generally encourages us to value the experiential, and the communities of practice literature in particular is sceptical of formal learning, for the group of strategists introduced here the formal was claimed as highly important. Books and courses both conveyed knowledge and stimulated learning processes that were absent in their own organisations. It was the wider strategy community, not the community formed by their management teams, that furnished them with the practices that they believed were central to strategy. These strategists had considerable command of these general strategy practices – from

SWOT analyses to away-days. Their problem was putting them in to practice. Here their organizational communities were not the source of learning but of resistance - and even, as frustrations mounted, of 'unlearning'. In their relationship with their colleagues, these strategists were now having to become teachers of strategy as well as learners.

On the face of it, these preliminary findings are uncomfortable for the communities of practice tradition, with its emphasis on the informal and its prioritising of the organisational community. A good deal of strategy learning here was formal and outside the organisation. But we should be aware of the limited nature of this research. It is not ethnographic or quasi-ethnographic, as the communities of practice literature would encourage. I have not, therefore, been remotely able to pick up the local detail of strategy practice in particular organisations. Strategy might be practised within these organisations much more subtly than my interviewees were either able or willing to convey. Moreover, I have not been tracking learning over time, but asking these interviewees to recall their learning processes in retrospect. Some truths will get lost in time. Finally, these interviewees were a very particular group – by the standards of most directors, highly educated in the formal techniques of strategy. Their willingness to participate in the research indicates an academic bent and they were certainly aware that they were talking to an academic. It is quite possible that this group, in these circumstances, might project an exaggerated importance for the formal.

Where do I go from here? Over the summer, I shall continue the pilot work but also be developing a proposal for more comprehensive research. There are enough surprises, and enough issues for practice, to justify more developed work. At this point, I propose to track a small group of strategy learners – with formal responsibilities for strategy, i.e. as directors - over two to three years. These directors would be newly appointed and relatively inexperienced at the start. In this period, I would use repeat interviews and also solicit comments from a nominated peer or mentor working closely on strategy issues. Some observation of strategising events with these directors involved would also be sought. Both directors with large investments in strategy training – ie by the Institute of Directors course – and those with relatively little training would be followed. The aim would be to compare before

and after training and also those with and those without. I would be grateful for your suggestions at this early stage of the research design process.

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