

Strategy as Practice

Research Directions and Resources

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From metaphor to practice in the crafting of strategy

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Abstract

This article explores how the link between the hand and the mind might be exploited in the making of strategy. Using Mintzberg's image of a potter undergoing iterative and recursive learning and knowledge-building processes as a point of departure, the authors develop a three-level theoretical schema, progressing from the physiological to the psychological to the social to trace the consequences of the hand–mind link. To illustrate their theoretical schema, the authors present an illustration case of managers from a large telecommunications firm experimenting with a process for strategy making in which they actively use their hands to construct representations of their organization and its environment. The authors conclude that new and potent forms of strategy making might be attained if the fundamental human experience of using one's hands is put in the service of all kinds of organizational learning.

Editors' introduction

This paper is an unusual action research study of a semi-consultancy intervention in the strategy making of a large mobile phone company, Orange. The authors are themselves the leaders of the intervention, though they do not describe themselves as consultants. The paper is noteworthy both for the intimacy of the empirical insight into strategy making in practice and for its sophisticated theorization of a strategy tool, the Lego Serious Play technique. The paper also provides an opportunity to reflect on the opportunities and constraints of action research.

The authors' starting point is Henry Mintzberg's (1987) famous metaphor of the potter at the wheel to characterize the hands-on crafting process of strategy making. While Mintzberg used the crafting metaphor to marginalize formal strategy, the authors carry forward its implications into the reality of deliberate strategizing. The paper's core is a case of senior managers using Lego bricks to model a company's strategy, using the same kind of hands-on,

iterative interaction with physical materials as a potter uses in moulding clay. As the authors summarize, the paper 'takes what appears to be an evocative turn of phrase (crafting strategy) and grounds it in practice' (91). By introducing the crafting of physical models of strategy, the paper cleverly takes Mintzberg literally in order to return formal strategizing to the foreground. This returning of strategy making activity to the foreground is at the heart of the Strategy as Practice endeavour.

Paper summary

The article opens with a paragraph directly quoted from Henry Mintzberg (1987), with the final line being: 'Managers are craftsmen and strategy is their clay' (66). With this quotation the authors simultaneously establish their concern for the hands-on, signal their location in the strategy process tradition broadly conceived, and claim the legitimacy of a well-respected theorist. This choice of opening quotation is in itself a clever piece of craftsmanship on the part of the authors.

The article continues by introducing three streams of theoretical literature making the case for the role of literal hands-on crafting in strategy. The first draws from research in physiology and communications on the importance of the hand in developing understanding: in English, French, German and Spanish, the words meaning hand and understanding are closely linked (consider 'to grasp'). The second stream of literature draws from the Piagetian tradition in psychology, in which effective learning is closely connected with hands-on recursive cycles of activity. The third stream is social constructionism, in which knowledge is seen as emerging from intense social interaction. The authors do not use these streams of literature to develop precise propositions, but they do knit them together convincingly into a coherent justification for their empirical focus on hands-on strategizing. They summarize the argument so far thus:

We began with a discussion of three areas of theory related to the strategy-as-crafting metaphor, all of them linked thematically and substantively by the ideas of recursivity and enactment. The physiological one focuses on the hand as the primary tool for manipulating the world and also as an often-overlooked means of stimulating cognition. The psychological one deals with the role of practical activity as a means of shaping understanding. The third uses social constructionism, which emphasizes that what we know of reality is constructed through discursive interactions of meaning making. Together, three bodies of literature help us extend Mintzberg's (1987) metaphor of crafting strategy as embodied recursive enactment, involving the psychological, social, and physiological domain of the hand-mind connection.

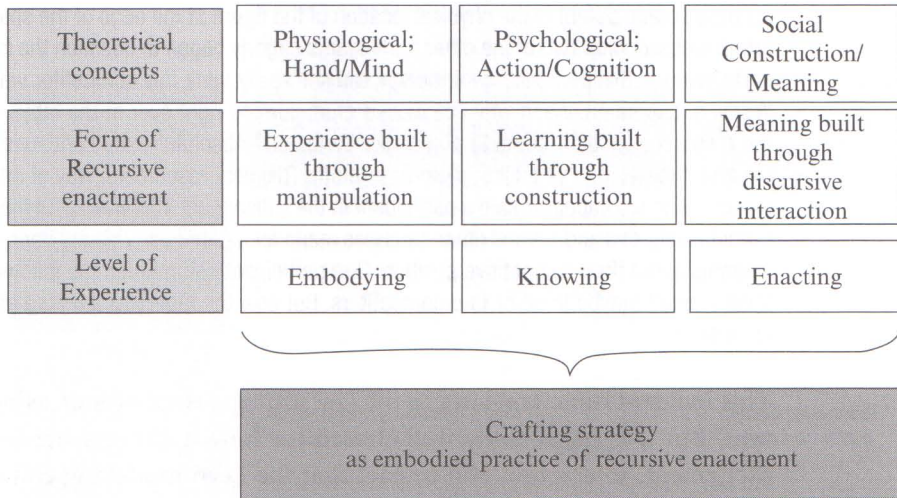


Fig. 1 The Concept of Crafting as Strategic Practice

Their theoretical position is also neatly encapsulated in Figure 1.

What this exploration of quite recondite theory has also established is that the authors are by no means simple consultants: this is a serious study. This provides them with a secure platform to introduce their 'illustrative case study', a two-day Lego Serious Play workshop in the phone company Orange.

The case study begins by introducing the company's three strategic issues of identity, branding and increased competition, established by interviews with senior managers before the workshop. The workshop itself is then described, using the authors' own observation, quotations from participants' remarks during the workshop, and post-workshop interviews and email correspondence.

The workshop involved the participants working together around a table to build a Lego brick model of their company's strategy. A flavour of the workshop can be got from the following extract, describing an incident on the second day when they had already constructed a so-called flotilla model of their strategic position:

In the next phase of the workshop, participants began to populate the area around their flotilla model, with different constructions representing aspects of their social, economic, and competitive context. One participant, for example, sought to illustrate how a very large competitor with its power base in another part of the world was likely to enter into direct competition with Orange, and she placed the large, blocky figure representing this competitor on a bookshelf on the wall behind the table. The competitor was, as she put it, 'coming in from left field,' an

assertion made patent in the physical location of the figure at the edge of the space where the group was working. Two of the other participants eagerly began to question the individual who had arrived at this particular contribution: Did she really think this competitor was interested? Yes, she responded, that's why I've placed them coming right over at the table. Do they have the resources to really come in and shake things up? Absolutely, she continued, look at how big and threatening I've built this model of them. This very resourceful way of introducing and representing a competitor, said a participant in the subsequent interviews, 'hit them in the gut.' Cumulatively, this and several other surprises made for a particularly strong impression on participants about their competitive position. One participant commented the following: 'I used to think we had maybe three or four competitors. But now the table just isn't big enough to hold all of them!'

This incident directly relates to the key strategic issue of increasing competition. But it is particularly well chosen for how it conveys the imagination, excitement, interaction and impact that the Lego modelling could generate. The authors make it particularly persuasive by weaving together a vivid sense of the experience at the time with punchy commentary from a participant in subsequent interview.

In another particularly striking episode, the authors describe how one of the participants moves the icon representing the Orange brand from the front of the company's flotilla to behind:

Up to the morning of the second day, the group had placed an icon of its brand in the front of the flotilla, as if that was what drew them further. In a moment of experimentation, one participant placed the icon of the brand at the rear of the flotilla. After a moment's hesitation, participants nodded in acceptance of this radical statement of the importance of the brand to their present situation, even though the notion that the brand was somehow behind them clearly struck several people as an almost taboo thought.

If attempted in words, this challenge to the value of the famous Orange brand might have been hard to articulate or liable to provoke furious intervention before completion. The simplicity of the physical move, however, made possible a reversal of given understandings of the place of the brand in the company's strategy.

The final part of the paper is made up of five sections: Discussion; Contributions to theory and practice from our theoretical framework; Implications; Caveats; and Conclusion. The Discussion integrates the empirical material in a second figure, with one axis based on the three earlier dimensions of physiology, psychology and social construction and the other axis based on the company's three strategic issues of identity, competition and brand. The consistency of theoretical dimensions and the visual echo of the first figure together provide a persuasive sense of completion and coherence.

Strategic issue	Crafting strategy as embodied recursive enactment		
	Physiological: Experience built through manipulation	Psychological: Learning built through construction	Social: Meaning built through discursive interaction
Identity	Building & arranging different: models of ships	Exploring the arrangement in terms of independent, yet related entities	Flotilla metaphor emerged as an accurate, integrative model of Orange's identity
Competition	Constructing a large, bulky figure situated on the shelf behind	Investigating this competitor's size position, and relevance	Relevance of previously underestimated competitor was acknowledged
Brand	Experimenting with the relative position of the brand icon vis-à-vis the flotilla	Inquiring the nature and role of the brand in this transition phase	Rather than drawing the organization, the brand was considered 'somehow behind'

Fig. 2 Crafting Strategy at Orange: Synopsis of Case Episodes

The Contributions section develops the theoretical discussion, underlining the paper's distinctiveness in demonstrating the importance of the physiological. The Implications section then widens out the discussion to argue for the potential value generally of the kind of visualization and dramatization approaches exemplified here. Readers are thus invited to see the particular Lego phenomenon as something much more than an idiosyncratic consulting tool. The Caveats section does, however, concede that this is a single case and underlines its status as 'a provisional and largely suggestive illustration' (91).

The Conclusion section is brief, and in a final paragraph returns to Mintzberg's opening metaphor in order to summarize the argument in broad and quite inspiring terms:

This article develops and illustrates an integrative framework to move Mintzberg's idea from metaphor to practice; crafting strategy is a process of embodied, recursive enactment. The implication of our thesis is that crafting strategy could one day no longer be simply a compelling image of an organization uncovering new opportunities through trial and error but a technique through which individuals collectively use their hands to develop a different type of strategy content. Instead of a detached, analytical, and cerebral activity inside organizations, the process of developing strategy can offer passion, involvement, and discovery in employees' work.

Editors' commentary

This article is unusual both in method and in subject. The action research method achieves remarkable intimacy. The authors were there, and that sense is conveyed throughout. Activity is described in a vivid detail not easily captured by retrospective interviews. The significance of putting the block on the shelf, or the icon behind the flotilla, would have been very hard to grasp by people outside the process. Readers learn something about both strategy consulting practice in general – for example, the routines of pre-workshop and post-workshop interviews – and a particular and innovative consulting tool, Lego Serious Play. But all this is also related carefully to theory. The Mintzbergian notion of craft is substantially extended, as the authors demonstrate its literal relevance to a kind of deliberate strategy making that Henry Mintzberg himself might originally have been sceptical about.

Indeed, there is a good deal of craft in the writing of the article itself. This runs right from the striking use of the Mintzberg quotation at the start to the closure of the final paragraph, where the authors leave us with an almost ironic extension to Mintzberg and a rhetorical appeal to 'passion, involvement and discovery'. The authors' early emphasis on theory carefully marks them as more than consultants. The authors are aware of the rhetorical power of three: there are three theoretical themes and three strategic issues, producing two nine-cell figures, neatly echoing each other. The various incidents during the workshop are narrated with a good deal of vigour. Scepticism is disarmed by an explicit Caveats section, as well as a light smattering of references to participants' occasional 'frustration' or 'critical comments'. Credibility is reinforced by the fact that the naming of the company itself, and the provision of several of the participants' job titles, leaves readers with the sense that they could check this account for themselves.

This is an impressive paper that researchers can learn a good deal from. There are, though, three things which researchers following this path might consider adding. First, this kind of action research provides rich opportunities for the analysis of photographic records of activity. Elsewhere these authors have made some use of photographs, largely for illustration (Bürgi and Roos 2003; Roos, Victor and Statler 2004), and researchers in the practice tradition more widely (e.g. Latour 1999; Molloy and Whittington 2005) have shown that photographs can uncover details of activity that are not easily captured in textual narrative. Given the emphasis on visualization and the physiological in this article especially, it would have been good to see more of the

participants' social interaction and hands-on activity. Here of course one may simply run into the limitations of journal editors' policies on the reproduction of photographic materials. However, photographic evidence is an under-exploited resource generally and in this kind of research has a good deal of potential (see chapter 3).

A second point is the desirability of providing more details of the relationship between the action researchers and research subjects. This article avoids the term 'consulting', although the episode has many of the features of such an engagement. The authors simply identify themselves as members of the Imagination Lab Foundation, which their website (www.imagilab.org) describes as an independent non-profit research institute. The exact relationship in terms of funding and pre-publication reviewing rights between the authors and Orange is left unclear. For good reason, the terms of funding relationships are now typically made explicit in scientific and medical research. Even if independence was retained in this particular case, it seems a good general rule to be equally explicit about the terms of the relationship in this kind of Strategy as Practice research where the mutual involvement of researchers and subjects is necessarily so intimate.

Finally there is the question of authorship: this is particularly sensitive for action research. In this paper, the authors are all from one side of the relationship. Their credibility is reinforced by the naming of the company, but nonetheless the company's perspective is not represented directly. Other researchers, for example Gioia et al. (1991) and Vaara et al. (2005), have used mixed teams of authors, incorporating both independent researchers and participating managers. While this may well not have been feasible (or desired) in this particular case, a more complete authorial team does add confidence in the rounded nature of the account provided. The subjects in many Strategy as Practice research projects are highly educated, and well capable of contributing directly to the writing of research. Mixed authorial teams, with both practitioners and researchers, promise both greater insight and greater authority.