# La conduite des « épisodes stratégiques » :
## une approche communicationnelle

Mathieu Detchessahar, Mathieu.detchessahar@univ-nantes.fr
Benoît Journé, benoit.journe@univ-nantes.fr

Université de Nantes, Institut d'Economie et de Management de Nantes (IEMN) – IAE
Laboratoire LEMNA

## Résumé

Ce papier aborde la stratégie par les pratiques des managers (Strategy-as-Practice). Il s'appuie sur une recherche action menée au sein d'une Direction régionale de La Poste pour rendre compte des pratiques communicationnelles à l'œuvre dans une réunion de direction et analyse les conditions qui permettent aux managers d'ouvrir un « épisode stratégique » (Hendry et Seidl, 2003) au cours duquel les orientations stratégiques de l'organisation sont mises en discussion. Alors qu'une grande partie de la littérature consacrée aux épisodes stratégiques se focalise sur la phase de reconnexion de l'épisode avec le fonctionnement quotidien et routinier de l'organisation, cette recherche se penche sur les phases d'initiation (déconnexion) et de conduite d'un épisode. Le cadre théorique de la communication de Habermas (1987) est mobilisé pour analyser très finement la structure de la dynamique communicationnelle qui se déploie à l'occasion de l'épisode stratégique ainsi que les conditions nécessaires à l'établissement d'un « dialogue innovant » (Schwarz et Balogun, 2007) entre managers. Le papier montre en quoi la recherche-action est une stratégie particulièrement bien adaptée à l'étude des épisodes stratégiques.

**Mots clés** : épisodes stratégiques, strategizing, strategy-as-practice, communication, Habermas, recherche-action.

# The Conduct of Strategic Episodes:
## A Communicational Perspective

## Abstract

This paper draws upon "strategy-as-practice approach" to study the conditions within which managers develop reflexive practices about the strategic problem they face. These practices are mainly discursive and take place in managerial board meetings. More specifically, we focus on a non-routine meeting at the French Post that was intended to create a strategizing « episode » (Hendry & Seidl, 2003). In this paper, we focus on the conduct of the episode. Drawing on Habermas' theory of communicative action (1987), we explore the micro dynamics of communication among participants and map out a number of conditions that makes possible an "innovative dialog" (Schwarz & Balogun, 2007) during a strategic episode. The paper shows that the habermassian framework is of great interest to conceptualize the different ways an agreement can be progressively achieved through dialog. This research question has methodological implications. "Catching" dialog among participants and understanding the subjectivity of actors committed in the episode supposes a close collaboration between observers and organizational members (Balogun et al., 2003). The paper finally shows that action-research is a possible way to design and manage strategic episodes that engage the managers in reflexive discussions.

# The Conduct of Strategic Episodes:
## A Communicational Perspective

Mathieu Detchessahar, Mathieu.detchessahar@univ-nantes.fr
Benoît Journé, benoit.journe@univ-nantes.fr

Université de Nantes, Institut d'Economie et de Management de Nantes (IEMN) – IAE
Laboratoire LEMNA

## Introduction

Doing in-depth studies of micro-events appears to be a good way of making "organizing" and "strategizing" visible (Kärreman, Alvesson, 2001). Some authors had suggested focusing on the discursive construction of strategies (Samra-frederiks, 2003; Vaara, Kleymann, Seristö, 2004). They argue that the discursive elements involved in strategic talks, and the description of the context in which they appear, contribute to our understanding of the large set of micro-practices that make up strategies.

This paper draws upon this strategizing approach to study the conditions under which managers develop reflexive practices for the strategic problem they face. These practices are mainly discursive and take place in managerial board meetings. More specifically, we focus on a non-routine meeting that was intended to create a strategizing « episode » (Hendry & Seidl, 2003). Such an episode brackets in certain actors and issues in a particular space and time and disconnects the meeting from the organizational routines. This kind of "episode" has received particular attention in recent research in organization studies. Three phases have been identified within an episode: the initiation, the conduct and the termination. Initiation and termination disconnect and reconnect the meeting with the day-to-day routine of the organization. Following this perspective, most of the research addresses the problem of

reconnecting the strategic outcome of the meeting with the normal functioning of the organization through the design of large series of meetings (Jarzabkowski, Seidl, 2006; Mac Intosh, Mac Lean, Seidl, 2007).However, little has been said about the conduct of the "innovative dialog" (Schwarz, Balogun, 2007) which is the main expected outcome of a strategic episode.

In this paper, we focus on the conduct of the episode. We specifically address the question of designing a space for innovative dialog and highlight the key problems of management related to this specific phase of the episode. This perspective leads us to a communicational approach.

In such a perspective, it is widely accepted that face-to-face communication is a quite problematic practice, especially when it occurs in a non-routine context (see for example Janis, 1982). Drawing on Habermas' theory of communicative action (1987), we explore the micro dynamics of communication among participants and map out a number of conditions that permit reflexive strategic practice during a strategic episode. The paper shows that the habermassian framework is of great interest in conceptualizing the different ways an agreement can be achieved progressively through dialog. We draw out the micro-practices of communication of the actors during the "conduct" of the episode and the way it is strongly connected with the micro-pratices of the "initiation" of the episode. The research also highlights the structure of intersubjective communication which is of particular interest in order to manage the innovative dialog.

This research has methodological implications. "Catching" dialog among participants and understanding the subjectivity of the actors involved in the episode assumes a close collaboration between observers and organization members. Moreover, close collaboration around the main strategic issues assumes that researchers are seen as helpful external facilitators for dialog among managers (Balogun, Huff, Johnson, 2003). This is why action-

research was favored here. This method gives direct access to the observation and recording of the strategists talk-based interaction during the meeting. The paper shows that action-research is a possible way to design and manage strategic episodes that engage the managers in reflexive discussions about the strategic issues faced by the organization.

The action-research was carried out at the French Post Office. The French Postal Service is currently facing major changes in its environment as well as in its internal processes. External changes are characterized by the end of the monopoly of the French State over mail services. As a result, the French Post is implementing new management tools in order to compete actively with new competitors. In this context of increasing change, the company faces a multiplication of health problems at work. The research presented here is in response to a demand expressed by the company, which is looking for a better understanding of the impact of current organizational and strategic changes on occupational health issues. According to the top managers of this organization, occupational health is a very challenging issue that is always on the agenda of the managerial board but that is never treated in-depth. We, as researchers, proposed action-research within which a non-routine meeting was designed to create a reflexive process that would help the participants to tackle the problem. Such a meeting is identifiable as a strategic episode, as defined by Hendry and Seidl (2003).

## I. Theoretical frame

Much academic literature has recently been calling for an analysis of strategy through the managerial practices (Whittington, 1996, Jarzabkowski, 2005). According to this "strategizing" perspective, strategy is not only located in certain rational and dramatic decisions made by senior managers and planners, but emerges from the day-to-day micro-activities of a wide range of managers and especially those of middle-management (Rouleau, 2005). This approach aims to dig deeper in the research direction in strategic management

initially suggested by the "processual perspective" (Pettigrew, 1973, Pettigrew, 1992). In such a perspective, oral communication is depicted as one of the main activities of managerial work (Mintzberg, 1973, Grönn, 1983). Sharing the same point of view, narrative and discursive approaches have been developed (Vaara, Kleymann et Seristö, 2004, Phillips, Lawrence et Hardy, 2004) through the systematic analysis of talk, conversation and linguistic skills involved in daily managerial activities (Samra-Fredericks, 2003). This paper draws on such a theoretical framework oriented towards a discursive approach to strategizing. It proposes an original combination of the notion of strategic episode with an habermassian perspective on communication.

### The Concept of Strategic Episode

The dynamics of "strategizing" remains one of the key issues in this approach. In this perspective, some researches have explored the role of workshops and meetings in strategy development (Hodgkinson, Whittington, Johnson et Schwarz, 2006). Conceptualizing these very practices of taking time out from day-to-day routines to deliberate on the strategic directions, recent studies have suggested the notion of strategic "episode" (Hendry et Seidl, 2003, Jarzabkowski et Seidl, 2006).

Drawing on Luhmann's social system theory, Hendry and Seidl (2003: 176) define an episode as a "*sequence of communications structured in terms of its beginning and ending*". The beginning and the ending are not defined by an external observer but by the committed actors themselves. These two temporal limits are of extreme importance in this approach. Indeed, the beginning and ending define a period of time detached from the regular functioning of the organization. On the one hand, the communication inside the episode is detached from the organization as a whole; on the other hand, at the end of the episode, the communication has to be re-integrated by the rest of the organization. During the episode, regular routines are suspended and replaced with new ones until the end of the episode: "*with the beginning of an*

*episode specific restrictions become effective (or ineffective) that again become ineffective (or effective) with the ending. […] The switch into the new context is temporary and the established structures are not destroyed by the switch but merely suspended.”* (Hendry and Seidl, 2003: 182-184). In other words, a strategic episode offers a temporary opportunity for strategic change: “*It is through episodes that organizations are able to routinely suspend their normal routine structures of discourse, communication and hierarchy, and so create the opportunity for reflexive strategic practice.*” (Hendry and Seidl, 2003: 176).

More precisely, a strategic episode is defined as a local and temporary organizational setting characterised by three steps structured by three processes: the “initiation”, the “conduct” and the “termination”. The initiation process is oriented towards the opening of the episode. It focuses on the agenda, the choice of participants and the issues to be discussed. It sets up the conditions for an effective communication among participants. Then, the process of conduct stimulates the auto-organization of the discussion though goal-orientation and time-limitation. And finally, the termination concludes the discussion and reconnects the communicational product of the episode with the whole organization.

Much research focus on the termination phase, and especially on the question of the transfer from the meeting to the wider organization (Jarzabkowski et Seidl, 2006, Mac Intosh, Mac Lean et Seidl, 2007, Schwarz et Balogun, 2007). This research shows that the design of the series of workshops is one of the main issues to realize the reconnecting. For example, the overall duration of the workshops, the frequency of the workshops, the seniority of participants appear to affect the chances of the workshops having the intended impact (MacIntosh, MacLean, Seidl, 2007).

In contrast, little is known about the conduct phase. Nevertheless, this phase is critical and supposes a change from the discursive structure of the day-to-day organization, as Hendry and Seidl (p. 184) have stressed: “*The structures to be changed are most obviously discursive*

*structures, including conceptual and thematic frameworks, reference points, shared assumptions and so forth. However, organizational structures, such as those relating to the spatio-temporal structuring of communication and the organizational hierarchy (what communications can legitimately take place when and between whom), might also be changed for the episode*". According to Luhmann, the new discursive structures within which the participants communicate effectively emerge from a process of auto-organization. Moreover, drawing on Luhmann's auto-organization concept, Jarzabkowski and Seidl (2006, pp. 25-29) emphasize the key role of "free discussion" in the strategic episode in increasing reflexivity, innovation and variations in existing strategies. Quite surprisingly, they don't stress the complexity and the difficulty of maintaining such innovative dialog among participants. Management seems to disappear behind the auto-organization of discussion although many authors emphasize the importance of monitoring the sensemaking activities (Weick, Sutcliffe et Obstfeld, 2005)

Our study goes deeper in the analysis of the managerial conditions that are required to sustain free discussion. We decided to focus the research on a strategic episode composed of a single meeting rather than a series of meetings. This research design provides fine-grained qualitative empirical data. It provides rich information about the conduct of free discussion that describes the very nature of the communicational dynamics that unfolds during a strategic episode. In this perspective, we draw on Habermas' theory of communication in which the question of "discussion" is essential.

### *An Habermassian Perspective*

Recent works in organization science have taken a "linguistic turn" (Alvesson et Karreman, 2000). Concepts such as metaphor (Grant et Oswick, 1996), story (Böje, 1991), discourse (Grant, Hardy, Oswick et Putnam, 2004), talk and conversation (Grönn, 1983, Boden, 1994) have been widely used in organizational and strategic analysis. In the "strategy-as-practice"

perspective, practices of face-to-face communication and discussion are considered as the main process of strategy elaboration. Some research has been attempted into the particular importance of this discussion in supporting innovative processes. To do so, they suggest additional notions such as "good conversation" (Bird, 1990, Quinn, 1996). "innovative dialog" (Schwarz et Balogun, 2007) or "free discussion" (Jarzabkowski et Seidl, 2008).

But rather surprisingly, in spite of their theoretical interest for management, the works of Jürgen Habermas on communication have been neglected. Theoretical reflection on communication is central in the work of Habermas, and shapes his sociological and philosophical analysis. He specifically highlights the conditions and requirements for genuine communication between actors.

According to Habermas (1987), communication is one type of action. He identifies four main models of action (teleological, normative, dramaturgic and communicative). The question of language and communication appears central in the fourth model which is characterised by the efforts of at least two persons to coordinate their actions through the construction of an agreement about a common situation of action (Habermas, 1987, p.102). Habermas introduces his concept of communicative action as a specific form of rationality for the analysis of the structuring of modern society. His work questions the Weberian analysis of the rationalization of society in terms of the domination of one type of rationality, i.e strategic or instrumental rationality featured as an ideal type. Based on historical evidence, he argues that other types of rationality remain. He explores the ways communicative rationality operates in modern society and provides a real potential of modernization in the sense of emancipation of human beings from all sorts of domination.

In this research, the ideal-type of communicative action is used in a narrow perspective that focuses on the condition in which a genuine discussion becomes possible in the particular frame of a productive organization.

This model of "communicative action" points out two main problems that are of particular interest for our purpose: (1) the "justification" problem and (2) the autonomy of the actors.

(1) Discussion is based on process of "argumentation" which is fed by mechanisms of "justification". Each participant claims validity for his opinion and at the same time tries to establish that validity by reference to objective "truth", normative "accuracy" or subjective "veracity".

- Objective "truth" means that what is said is objectively true. The participants establish a relationship between their discourse and the objective word of facts and events.

- Normative accuracy means that what is said fits with the normative context of the situation (cultural, organizational rules and procedures…).

- Subjective veracity means that the intention of the actor is really thought or experienced in the same way as it is publicly expressed. As Pozzebon & al. (2006, 250) state "subjective veracity is represented by statements expressing the lived experiences in a truthful way" (Pozzebon, Titah et Pinsonneault, 2006).

(2) A *discussion* is defined as a reflexive activity about the definition of a situation in which the participants are involved. The discussion is aimed at achieving a mutual understanding of the situation, rather than an alignment on a single interpretation induced by hierarchical pressure or cultural integration. Indeed, one of the conditions for a genuine *discussion* is that each participant expresses his opinion publicly in such a way that it can be questioned and contested by the other participants. In other words, such a *discussion* should produce a "Yes" or "No" reaction about the validity of one's opinion. The reflexivity of the communicative action depends on the degree of autonomy in the expression of the opinion. According to Habermas, the discussion draws on a cooperative logic of the "best argument" (Habermas, 1987, p.41) excluding other motives of action apart from the cooperative search for truth.

But such genuine *discussions* do not spontaneously and "naturally" exist inside organisations, mainly because of political or cultural and psychological barriers. The auto-organization of the discussion inside an episode, as suggested by Luhmann, does not fully address this problem. We argue that strategic episodes need to be actively managed in order to produce this kind of genuine discussion. A specific design as well as a specific organization of the episode are required to create the conditions for the *discussion*. This paper examines more particularly, how a strategic meeting can be transformed into a strategic episode by the way of action-research and stresses the key role played by the researchers as external participants.

## II. Research Design and Methodology

This study draws on a piece of action-research. Often used in organization studies, this research design is still rare present in the strategizing literature, apart from a few exceptions. According to Lewin, the introduction of an intentional change by the research team exposes some basic organizational processes that would remain invisible in a passive observation (Lewin, 1946). Furthermore, according to Balogun et al. (2003), action research appears to be a possible answer for the study of strategizing practices. The use of action research strengthens "research access, promotes data quality, provides something useful to an organization" and finally involves managers and researchers in a common research agenda. Thus managers become research partners rather than passive informants. More than traditional case and ethnographic studies, which position researchers as interpreters, action research enables researchers to encourage greater self-reflection in the managers and to more deeply analyse the structure of this reflexivity (Balogun, Huff et Johnson, 2003).

The change implemented in our study was a meeting of top and middle-managers. It was organized as an interactive discussion group: managers were invited to participate in collective discussion about the strategic changes in the organization.

This qualitative research proposes a single-case analysis (Eisenhardt, 1989). It is based on ethnographic methods (Garfinkel, 1967, Goffman, 1974) currently used in discursive approaches of strategy and strategizing (Samra-Fredericks, 2003, Vaara, et al., 2004, Rouleau, 2005). The data collection is according to the principle of triangulation (Yin, 1991): interviews, direct observations and document analysis were combined. The corpus of data is mainly composed of two kinds of *verbatim.* The first one comes from interviews with the 12 participants in the strategic episode. They were done individually *before* the beginning of the discussion group. They were non-directive interviews about the strategic changes faced by the organization and the connections people made with the problem of occupational health. All interviews were taped and fully transcribed (over 500 pages). The second kind of verbatim are drawn from the recorded, and fully transcribed, three hour meeting (40 pages).

Tape-recording is usually seen as problematic because of the confidential nature of strategy topics (Jarzabkowski, Seidl, 2006). This problem can be overcome as one of the main advantages of action-research is to enable researches to build a close collaboration with managers that generates confidence and, thus, allows the researchers to have direct access to confidential discussions. In the perspective of "strategy as practice", this methodological orientation permits the gathering of examples of discursive practices and the transcription of the on-going flow of turn-taking and argumentation throughout the episode. This corpus of data gives access to the discursive structure of the strategic episode via talks and conversations. We focused the analysis on the interpretations and opinions of the actors in the episode.

We carried out a qualitative content analysis of the data (Huberman et Miles, 1994). In a first phase, verbatim were coded with the *a priori* category coding technique using the theoretical concepts of initiation, conduct and termination of the strategic episode, the linguistic skills used by the actors and the three habermassian categories of legitimation. In a second phase

new categories emerged *a posteriori* in order to characterize the micro-processes operating in the three steps of the strategic episode.

Furthermore, this kind of action-research design can be understood as a double inquiry: on the one hand, the inquiry about the problem faced by the organization (with help of external facilitators); on the other hand, the inquiry of the researchers about strategic episodes. The second is fed by the first one. The commitment of the researchers as external facilitators in the first inquiry imposes a great effort of reflexivity for the researchers (Alvesson et Sköldberg, 2000, Allard-Poesi, 2005). And precisely it's this reflexivity that shapes the analysis of the micro-practices at work during the strategic episode considered in the current research.

## III. Strategic episode within the Western Regional Office of the French Postal Service

Our study was conducted within the Western Regional Office (*Direction Régionale Ouest,* or DRO) of the Mail Management division of the French Postal Service, that is currently undergoing significant changes. Along with the other three operating divisions of the French Postal Service (Express Mail, Postal Service Bank, Postal Outlets), the division now operates in a competitive market. The Mail Management Division first faced liberalization of its market in 2006: 46% of the Transaction Mail business line currently faces competition, and the entire business line will have competition by 2011.

In anticipation of the liberalization deadline, over the past 10 years or so the service's Transaction Mail business line had to implement the principles of economic rate of return and qualitative performance: the former to ensure its ability to generate cash flow from its own activities, a must for modernizing and maintaining its property and industrial assets, and the

latter to provide a high enough level of service quality to establish customer loyalty and even potentially draw in customers from other national markets.

In response to these challenges, the Transaction Mail business line launched *Cap Qualité Courrier [Destination Mail Quality],* an extensive facilities and equipment modernization program slated to last several years and expected to cost 3.4 billion euros. This program seeks to increase productivity by boosting the automation and reliability of distribution processes. These efforts to modernize the French Postal Service are seen at the regional division level in an increase in organizational innovations and a steady stream of change phases.

The Western Regional Office (DRO) employs close to 4,500, and, with 40 other regional offices, ensures national coverage for the Postal Service's Transaction Mail business line. Each regional office is responsible for implementing Postal Service policy within its area and, to do so, has regional responsibility over all necessary organizational functions, including production, sales, human resources, finance and communications.

The DRO has quite limited strategic leeway. Despite being evaluated according to its operational rate of return, it does not have control over its investment policy, or entire control over its organizational methods (new tools are designed at national level), or control over its marketing, since it is not in charge of product innovation. Given this context, management decisions carry significant strategic weight for DRO stakeholders. This is what makes it possible to differentiate one regional office from another, as they are all continuously compared at national level (ranking and benchmarking).

Of the criteria used to evaluate the management of regional offices at national level, social indicators hold special significance. Since 2005, the DRO has seen an increase in instances of medical leave and employees on temporary or permanent disability leave.

The coexistence of issues related to organizational change and occupational health was the impetus behind the request that led to our research team to work within this business unit.

First suggested to the management by the DRO occupational health doctor, our research project was favorably received by the director of human resources and later the executive director. Our assignment was to study links between DRO work-organization methods, management types and the reduction of occupational health problems.

**III.1. Occupational health: the forgotten dimension of strategic discussions at DRO**

The first phase of our work involved a series of interviews with DRO executives (functional directors), company doctors and a sampling of operational managers (plant managers and a group chief). There were 12 exploratory interviews (of 1.5 to 2.5 hours), conducted with six functional directors, two doctors and four operational managers, focusing on the nature of organizational changes at the Postal Service, how those changes take place and the health status of personnel.

The interviews revealed that occupational health was an issue that top managers, operational managers and doctors alike considered of central concern for the DRO.

Top management is very sensitive to the negative impact that unfitness for employment has on productivity:

*"It's generating incompetence, exasperation, people putting themselves on leave, temporary unfitness for work; and this is extremely debilitating, because once our people become unfit for distribution work we no longer know what to do with them (...). That's what's debilitating. I mean, in my view, you'll hear what others think, but for me it's extremely debilitating. Today, we likely have 120, 130 or 150 people who are unfit for work" – project director.*

*"When we're clocking in at 100 full-time equivalent employees unfit for work in the DRO every year, that's a problem" – DRO doctor.*

For their part, in addition to unsuitability-for-work issues, operational managers emphasize an upsurge in unexpected short-term absenteeism, which is of a deeply disorienting nature for work teams given that replacements cannot be made:

*"In any case, for long-term absences, well, we turn to fixed-term contract workers, whereas with short-term absences we have to make do with what we have at hand" – plant manager.*

Viewpoints differ as to the cause of these health problems. The regional director was quite insistent on the idea that the DRO is changing along with French society as a whole, in which, he maintains, the individual's sense of identification with his or her employment is lessening and is increasingly marked by complaints and conditional involvement.

At the same time, operational managers and some functional directors focused on the wide range of changes, poor change management on the part of the DRO and a lack of visibility as the chief problems. The deeper reasoning behind the reorganizations seems to have escaped them, and this complicates their management efforts:

*"This is why, in our unstoppable cycle of reorganizations, we generate unfitness for work"* – project director.

*"Because, I'll tell you what I think about this, it's that we would very much like to make progress, but what stops us is, first of all, that we don't really know where we are headed – I think that's mainly what's going on. We would very much like to do it, but we don't know where we are headed (...). What you need to know is that there is poor communicatin in the Postal Service. If, throughout the various changes, there is not a clear willingness to substantiate plans, change won't happen. We, the operational managers, need to be informed of everything that is going to happen within two to three years, even a five-year plan, you know? A five-year plan and to know where we're headed, you know? Whereas right now, it seems to us that the plans, even if well packaged, keep coming one after another without any willingness, I mean, without any clarity. What bothers me most is the lack of clarity, not knowing where we are headed, where the group is headed, and that's bothersome. It's bothersome because, well, the clearer things are for managers, the easier they will be to explain. When it's less clear, it becomes more difficult"* – plant manager.

At the same time, those interviewed were in agreement regarding the difficulty in understanding the health problems and addressing the issue of unfitness for work in particular. Some even lamented instances where the discussing the problem was avoided, something the management team has reportedly been unable to address collectively:

*"How do you deal with unfitness for work – no one knows how, really, but we continue to create it without knowing. Unfitness for work? On the Executive Committee, we all just look at each other, you know, as in, 'What are we going to do?' And when we plan to address the topic in COP, meaning when we have DRO staff plus all plant managers, and we want to put unfitness for work on the agenda, it gets taken off the agenda at the last minute because we*

*don't know what to say or what to put down for an action plan...and there you go" – project director.*

*"Unfitness for work? This is of such concern to them that even though the new director has been in his position since September, the one time he met with me we did not talk about the issue of unfitness for work. We went quickly round the table and that's it. He hasn't met with us since. Same thing with HR. So for those who understand the priority of prevention, you have to wonder (...). It isn't going anywhere; I feel it's not going anywhere. We have a very difficult time working with the directors, for example" – DRO doctor.*

Given (1) the issue's significance for those involved, (2) the range of ways in which the issue manifests itself and (3) the difficulty in addressing the issue as a group, the research team suggested to the regional director that a work session be held to cover these initial findings. For the research team, the goal was to initiate discussion about health-related issues, to help the corporate group address the diverse manifestations of these issues and to encourage each individual and the group as a whole to adopt a reflective mindset.

To accommodate this work session, the DRO put several communications routines in place. At the time of our contribution, three different committees dedicated to addressing DRO-wide issues of concern existed:

- The select management committee: comprising the regional director and functional directors; convenes every two weeks.

- The full executive committee: convenes after the select management committee's meeting; includes group chiefs, i.e. those managers in charge of running a certain number of plants (distribution sites) within a specified geographic area.

- The quarterly plant managers' meeting: the regional director meets with the 40 plant managers.

With management's consent, a decision was made to break with these communications routines for two main reasons: (1) up to that point, they had proven incapable of addressing the health issues question, and (2) no routine was likely to cover the variety of viewpoints gathered via interviews. The idea of a three-hour work session, bringing together an *ad hoc*

group and during which discursive, communicative and hierarchical routines would be suspended, was thus decided upon. These characteristics are aligned, point for point, with the definition of the 'strategic episode' as advanced by Hendry and Seidl (2003). To account for the microactivities at work in this episode, we will review each of the three phases identified by the authors.

## III.2. The researchers' and managers' micro-practices at each step of the strategic episode.

According to Hendry and Seidl (2003), a strategic episode plays out in three phases: initiation, conduct and termination. In this section, we will review the practices of those involved (corporate stakeholders and external facilitators) in each of these phases.

### III.2.1. Episode initiation

For Hendry and Seidl, '**initiation'** serves to make the communication between stakeholders possible. From the accepted Habermassian perspective, the challenge at this stage is to design a future discussion 'space' in such a way that expressing autonomous opinions is made possible.

External facilitators, i.e the researches, played a key role here, in particular by choosing who should attend the meeting. Ten DRO representatives were suggested: five from central office (four functional directors and the regional director), four from operations management (two group chiefs and two plant managers) and one company doctor. No existing committee united all of these stakeholders at once, meaning that no close meeting of representatives that

included central office decision-makers and decision-makers in the field, down to the plant manager position, was possible. What's more, the company doctor had not traditionally participated in DRO management communications routines; his participation was suggested not just because he holds an expert opinion on the subject and is likely to shed light on the discussions, but also because, given his protected employee status, he benefits from greater freedom of expression than other managers. During interviews contributors also verified that the doctor chosen (from among three within the DRO) was the one with the greatest legitimacy in the eyes of the managers (due to his conscientiousness, work performance, listening skills etc.).

We must emphasize here how absolutely essential preliminary diagnosis is in the selection of participants. Such diagnosis makes it possible to identify the company's key individuals, i.e. those who comprise the 'concrete system of action' (Crozier, Friedberg, 1977), which will always vary from one company to the next with regard to health issues. In other words, the choice of participants was informed by prior investigative work.

The preliminary diagnosis also plays a key role in fuelling the upcoming discussion and preventing instances of sterilized group discussion. Indeed, interviews conducted in-house made it possible to unveil, collect and classify stakeholder perceptions in one-on-one sessions. During discussion, contributors had the opportunity to put forward their perceptions to stakeholders while, at the same time, these perceptions were depersonalized, i.e. conditions were created whereby the individual who offered these perceptions is forgotten so their insertion into a critical discussion is thereby facilitated.

In addition, external facilitators developed an agenda, taking care to:

- Present this meeting as an exercise meant to confirm that the researchers properly understood how the DRO operates, and not as an open discussion on health-related issues involving management, middle management and a doctor.

- Situate this meeting within a series of repeated future meetings intended to help guide the overall study and work with the findings.

- Have the agenda approved by the DRO and involve it in the meeting by asking it to convene all the meeting participants.

External facilitators are also presented as required to moderate the meeting.

Taken together, these efforts help in designing a discussion 'space' that will be open to a strategic-episode opportunity.

### III.2.2. Episode conduct

The second phase of the episode relates to **conducting the discussion**. If, as Hendry and Seidl note (2003), the discussion dynamic results from self-organization, this largely depends, as we will see, on the preliminary design of the discussion 'space' as well as the discursive skills and strategies employed by stakeholders.

The design of the discussion 'space' makes it possible at this point to spark discussion and give interpretation of the comments collected during interviews, which, at this stage, have not yet been collectively addressed by the group. When presented by the researchers, these comments are distanced from those who made them and are therefore more readily opened to criticism. Furthermore, when presented by the researchers they are less likely to be challenged for the sake of mere authority-related argument and this requires stakeholders to justify their stances in a reasonable manner. When placed in a situation requiring dialogue and faced with differing interpretations that are difficult to dismiss in an authoritarian manner, stakeholders are also forced to compare and align these interpretations resolve any disagreement.

Let us first see how the researchers report on the first opinion (i.e. the first yes/no stance taken on a topic), the discursive strategies used and the justification 'class' (validity claim) referenced.

1  **Researchers:** The idea (is that) that, after all, up to now, it's probably, it may be – you will tell us –
2  changing, but perhaps the idea is that, after all, what is purportedly most lacking, is the best way to say it,
3  not that, in managing change, between the operationals and functionals, there isn't much to work with. Or
4  at least, the space in which we will be able to adjust, more accurately regulate the field, lacks sufficient
5  input. Why? Because it is not taken ahead of time, upstream, and because it is not sufficiently informed. So
6  when we say there's no room for negotiating change with the entire DAS, it's this idea that, in the end, only
7  a field officer who is in fact asked to throw himself deeply into his managerial role, to experience it and
8  experience it with autonomy, then, after all, maybe he or she is not given (for the time being) – especially
9  when reorganizations take place – the resources to truly experience that autonomy. Which can potentially
10  happen with regulation or adjustments. So the idea that these negotiating 'spaces', these local 'spaces' for
11  discussion about coming changes, certainly should be boosted, created, structured a bit better. So, there
12  again, that is how we understood your contributions.

The researchers, having the moderator role open the discussion. They put an initial, controversial, interpretation, collected during individual interviews in the diagnostic phase, up for discussion. This initial interpretation could be summarized as follows: "The Postal Service's poor change management is one cause behind the current employee-malaise issue (**interpretation 1**). This interpretation is made public in the sense that it is given to all stakeholders, thus creating a system around the issue of health and change by involving top management, middle management, operations management, a doctor, HR and so on. Interpretation 1 is also justified with reference to the subjective realm, in the sense that it is presented as the result of the researchers' personal appropriation of views held by the stakeholders with whom they met (line 14). This justification based on *veracity* allows the researchers to emphasize that they are merely trying to understand the stakeholders, with no strategic or teleological desire to impose a solution, and for this reason the interpretation deserves to be discussed. This call for discussion is reinforced by the 'softening' discursive strategy (Samra-Frederiks, 2003) that was clearly used by the researchers at the start of their intervention (lines 1-3).

The regional director is first to react to the researchers' request for discussion.

1    **Regional director**: I can make a comment at this point... (social realm).
2    **Researcher**: Go ahead.
3    **Regional director**: Well, it seems to me quite accurate historically (nuance, social rule etc.). We should
4    nonetheless put it back in the context of current developments, because at the same time this meeting is
5    being held we are also in EFQM mode; we are pretty much using the same approach on what is, what
6    really is the quality of project roll-out, and so we are outlining how we reorganized, how all the projects
7    carried out since the beginning of the year, and, well, what we are doing now is, it really negates that.
8    That is to say, the observation is a dated observation, it's an observation from, let's say, early 2007 – late
9    2006, early 2007 – and so here, we have completely, well, we have truly resolved our reorganization
10   process, that is, how reorganizations take place, which is, well, which is quite symptomatic, in my point
11   of view, in any case , is that we didn't assign this reorganization to the DPRO. It's HR that centralized all
12   of the, all, I'm going to say the entire reorganization of the distribution process. So that's to say that we
13   slightly shifted the view from a very technical approach, as you put it, toward a slightly more human
14   approach, even if after that, once... well, yes, well, HR, that's it...so there you go. And so we implemented
15   a process that today, according to how the DETs understood it, put in place three official meetings before
16   rolling out the reorganization, which means that what you are describing, which again, is historically
17   accurate, I am not disputing the validity of it – who is? I'm a DET, I don't have negotiating room, I don't
18   have room for discussion, everything from DPRO comes to me pre-packaged and ready to go, today,
19   now, May, June, July 2007 – that's no longer true. It's no longer true and today we have official processes
20   for exchange with DETs, well, with the entire DAS, DPRO, but also the others, i.e. communications,
21   DFI, HR, which means that there is, well I don't know if it's room for negotiation, but at least room for
22   exchange and validation of the various necessary steps in affecting a reorganization. In other words, at
23   the same time the specifications, the 'diag' and then the scenario, well, the scenario, that depends on
24   whether you are Italian or not. But there you go, this was just to bring, once again, this seems to me to be
25   very important, that is, since your study will be long, it's dated, what I mean is, is that it's dated.
26

The interpretation put forward by this director is a 'no' position with regard to the interpretation put forward by the researchers: "Change management currently is not an issue likely to erode employee welfare " (**interpretation 2**). This interpretation is justified in reference to an objective realm of objects and living beings. In *truth*, the way changes are made was significantly altered in early 2007, moving toward more consultation with field managers and greater cross-cutting. It was the human resources management team, and not the production management team, that led the change process overhaul, signalling a significant paradigm shift. Let us note here that the argument behind this second interpretation is presented via various discursive strategies that relate to the director's dramatic behaviour, i.e. how he presents his public disagreement with the researchers. For a variety of reasons, one would think that the director has nothing to gain if the researchers lose face (he arranged for them to be there, the study will last at least a year and so on). He does, however, have something to gain by defending his 'no' stance, which prevents the creation of a new action plan and makes it possible to continue the intensive change strategy. In addition, he several times underlines the relevance of the interpretation offered by the researchers, which he

'limits himself' to putting back in its historical perspective *("It's dated," "It's no longer true")*. His strategy therefore involves humouring the researchers and manipulating history to serve his interpretation.

Given the difference of opinion (researchers vs. executive director) and the need to get beyond dissent that threatens to stir up criticism and opposition or bring the discussion to a premature close, a fellow stakeholder attempts a conciliation by proposing an interpretation that overlaps the first two just enough to create agreement between the two parties and get the discussion going again. This trouble-shooter is the human resources director:

1   **HR director:** Currently, when you made the observation, you could only have encountered that. This,
    since we are starting to use the approach, and in any case we are starting little by little, that is to say, we
2   are having individuals who were already in the final stages of reorganization start the approach, meaning
    that the early stages have already been carried out, well, since it's there, so we are really starting our first,
3   initial necessary steps, which took place only two weeks ago.

We see that he, too, manipulates history to offer the parties a middle-ground interpretation. What he is in effect telling us is that yesterday is not so far away...and the situation described by the researchers is indeed one that still exists, even if the tools that will make resolving these problems possible have been in place for two weeks. He, too, justifies his stance with *truth* and with reference to the objective realm, but he indicates that, while the solutions are indeed in place, their concrete implementation cannot yet have changed how personnel experience the way change takes place. He refines the researchers' interpretation by taking the current reforms into account and refines the executive director's interpretation by taking the very recent nature of the change into account, which explains the experiences collected by the stakeholders. He also proposes a third, conciliatory, interpretation that both enhances the researchers' and executive director's interpretations and offers an end to the disagreement. The stakeholders in fact accept this closure. The researchers do so explicitly:

1     **Researchers:** You are going to see, we also have a board on that. That means, well, I am in fact going to
2     let you talk, and you are quite right, but don't worry if that seemed to us pretty common in the

3    interviews; but don't worry, what you were saying earlier also is, but we chose to put that on another, on
4    another board that we called...
5    **Operational manager:** Hopes?
6    **Researchers:** Um no… 'Managerial reaction' – that's better, no? (Smiles.) That is, in view of this, there
7    have already been managerial reactions and that's another slide, and in a moment we'll come back to
8    these managerial innovations (looking at the executive director)...

This conciliatory interpretation is clearly picked up and accepted by the researchers. Their interpretation becomes: "The Postal Service's poor change management caused the health problems encountered today, but recent managerial innovations provide hope for future improvement" (**interpretation 3: conciliation 1**). Through his silence, the executive director implicitly accepts this new middle-ground interpretation.

Once conciliation has occurred and agreement has been reached on a joint interpretation, new discussion possibilities open up around new questions. Here, the discussion is taken up by the occupational health doctor, the stakeholder with the greatest autonomy vis-a-vis the organization and its management. The doctor brings up the very content of change-management reform at the Postal Service: Are the innovations that have been implemented able to solve employees' occupational health problems and those of plant managers in particular?

1    **Company doctor:** That said, if there is a joint meeting, that can only be better, but you scare me by
2    mentioning the leeway, the negotiation – if there is any! You said...
3    **Executive director**: Well, yes.
4    **Company doctor:** If no negotiation takes place, if they [plant managers] don't have any leeway…
5    **Executive director:** There always is …
6    **Company doctor:** There will be the same feeling [pressure and lack of listening].
7    **Executive director:** No, no.
8    **Company doctor:** That is to say, even if we do explain to them what is going to happen, what was
9    missing, well, I felt that they were being presented with a 'done deal'; there wasn't enough time between
10   roll-out and awareness of what was going to happen – that has already been improved quite a bit, but if we
11   tell them and tell them often, this is what we intend, plant managers, in any case, what are they retaining
12   from your plans, I have to do -4, have to do -2 etcetera, and after that they cut where they can without
13   taking into account…
14   **Executive director**: No, no...
15   **Company doctor:** I'm exaggerating, but still, for us, in our minds, this is what we see, this is what we see,
16   in the Carquefou-St Luce plan, I'm sorry for the minimal information here, but the difficulties that we
17   encounter, from a, well, human point of view, are related, because four routes were eliminated; I mean, two
18   of the six routes in St Luce, so, and it's not the two routes that should have been eliminated, that's another
19   subject, but...
20   **Executive director:** So we can discuss that, it's true, afterwards...
21   **Company doctor:** From a human perspective, unfitness-for-work and then FGT perspective, that will be
22   very costly to you afterwards; I'm telling you, it has even started.
23   **HR director:** Well, we'll see about that.

24    **Company doctor:** Well, it's a sure thing.
25    **HR director:** I'm not so sure of that.
26    **Company doctor:** I know it to be true.
27    **HR director:** Because already there is very little exchange, what I mean by that is words, even to jointly
28    say that it is having a negative effect, for me, they can say that it's having a negative effect...
29    **Company doctor:** Yes, but it's passive listening, they want active listening…
30    **HR director:** That's already done.
31    **Company doctor:** Yes, but they want active listening, Mr. Logodin.
32    **Group chief:** Work needs to be done…
33    **Company doctor:** They'll very quickly become frustrated, they'll say – well, me, I'm quite afraid, I don't
34    know how, what you think, but it's good already but I'm telling you...
35    **Group chief:** I think that work needs to be done on both sides, that is to say, as much as there is indeed
36    work to be done on training, taking elements into account far upstream, there also needs to be, what is
37    more, this community that is emerging and that up until now was led, well, takes its share of responsibility
38    and understands that we are working under significant constraints and that negotiation in spite of
39    everything is, well, or leeway, is limited, in any case, in the areas that concern them, which are pure
40    productivity, and that negotiations have to be shifted to other areas. but productivity and timelines, because
41    it moves quickly but it has to move quickly, there is no choice, so you see, everyone will have to progress a
bit with regard to his or her perception, you know?

The company doctor is questioning the reality of the change as presented by the executive director. In the end, her interpretation is as follows: "The health problems come from the fact that management was presenting plant managers with a 'done deal', and it is not certain that these new management methods are changing that situation and granting them negotiating authority again" (**interpretation 4**). The company doctor is showing genuine communication skills, which we can clearly see in her ability to change her justification registers according to the executive director's reactions. In lines 14-16, she starts by justifying her interpretation as *veracity*. Faced with the executive director's refusal to give credit to this validity claim, she changes register and justifies her interpretation as *truth* via an example (lines 14-17). This justification, referencing the objective realm of facts, allows her to remain in discussion this time with the executive director, who does not end the discussion. Nonetheless, interpretation 4 is also contested by the HR director (line 25-26), who seems to suggest that the principle of active listening is already in play, which the company doctor continues to contest (**interpretation 5**, line 27). Given the scattering of interpretations, an attempt at conciliation is made by a group chief (lines 33-39), who expresses **interpretation 6** as *veracity*, which involves presenting both senior management and plant managers with their respective responsibilities.

This **sixth interpretation** is not contested, and contributes to opening a synthesis phase based on a 'change-management and health' topic.

1    **Executive director:** So these [management reforms conducted], in my opinion, these are elements that
2    also apply to the next six to eight months...
3    **HR director:** It's the starting point.
4    **Executive director:** Yes, we'll see.
5    **HR director:** So we'll see if...
6    **Executive director:** I think that it won't be the same; otherwise, that would mean we messed up...
7    **Company doctor:** No, I mean that is what has been done. But I was playing devil's advocate a bit, because
8    I think it's important...
9    **Executive director:** Yes of course, but I, once again, I started... I'm not criticizing at all. Historically... I
10   simply wanted to say, well, you know, it's dated, I hope that it's dated.
11   **Researcher:** And we will certainly have the opportunity, of course, to verify all this.

A very clear shift in the justification registers used by the executive director is observed. What was, until this point, expressed as *truth* is now being expressed as *veracity*, i.e. in personal-conviction mode (*"In my opinion"* – line 1, *"As for me, what I think"* – line 6, and *"I hope that"* – line 10) and no longer from the viewpoint of stated fact. The temporal relationship has also changed: where the question of resolving health issues referred to the past in the first interpretation, it now points to a future (*"Six to eight months"* – line 2) that is presented as hypothetical (*"We'll see"* – line 4, *"Otherwise, that would mean we messed up"* – line 6, and *"I hope that it's dated"* – line 10). Taken together, this all eventually leads to the development of **interpretation 7**, which then serves as a central reference point in future discussions and research, as proposed by the researchers in line 11. This **seventh interpretation** can be summarized as follows: "Change management and health are linked. Reforms were implemented, which we hope – keeping in mind the possibility that mistakes were made – will allow for improvement of the situation over the medium term. This should be specifically assessed in the follow-up to the study." We see here just how much initial interpretations 1 and 2 were enhanced through being discussed without being disqualified, and how **interpretation 7** enables the group to take action with regard to health issues that the group had quite a bit of difficulty grasping until then.

Generally speaking, we see a three-phase discursive dynamic beginning to emerge here: *publication* of interpretations, *justification* and *conciliation*. *Publication* of the interpretations (adoption of yes/no stances on a certain topic) is initiated by the researchers, who put the stakeholders in a position of addressing an interpretation not yet discussed as a group. A set of discursive skills and strategies is necessary here to render open those interpretations, which the social body had until then kept far from public discussion. The second phase is the *justification* phase: what arguments enable one to take the publicized 'yes/no' stance? Different justification registers are used here: *truth*, *veracity* and *accuracy*, as clarified by Habermas' theory of communicative action. The *conciliation* phase is when interpretations are aligned and a consensus is built, making it possible to bring the controversy to a temporary close and raise other issues for discussion.

This publication/justification/conciliation process emerges three times during our meeting with regard to three different topics, each being the focus of discussion in the strongest sense, that of public, critical discussion of opinions:

- Poor change management, which lies at the core of the health problems and quality of management reforms implemented, as well as their capacity to improve the situation.
- The influence of societal changes on the problems encountered by the Postal Service.
- The role and identify of the DETs.


### III.2.3. Episode conclusion

The strategic episode concludes with a phase that Hendry and Seidl call '**termination**'. The authors clearly identify the specific difficulty of this phase, which must allow for both the preservation of the originality of what has just been exchanged and its contextualisation in relation to the organization's routines. As Boden (1994) argues, the episode brackets actors

and issues within a particular time and space away from the regular organization, the point is to reconnect the discussion with the normal flow of the daily organizational activity.

The question of reconnecting the outcomes of discussion with the routine of the organization is beyond the scope of this research. Yet, it is important to underline the final process of concluding the discussion through which the participants acknowledge that something new has happened during the discussion.

In our case, the discussion terminates with an initial stage involving what we suggest calling 'ratification' of the reality and significance of the episode. In this instance, it is the chief personnel officer who best translates the group's agreement regarding the innovative nature of the episode:

1    **Personnel Officer:** I for one am very interested and feel that much has been shared. I also think that this
2    may be the first time we have shared so much amongst ourselves...

Once this ratification is obtained, the meeting concludes with a discussion involving the executive director, the HR director and the contributors regarding how they will now organize the continuation of the study. This ratification means that the problem of organizational change and occupational health is now put on the agenda. Therefore, the members of the organization can legitimately spend time on this topic and back the researchers in their field work. With such a perspective, four plants had been chosen for the investigation. A series of meetings had been planned with the HR Director in order to collect HR indicators about occupational health. Simultaneously the role of the company doctor has dramatically changed: from a role of health expert to a role of a partner to the managers involved in organizational change. Moreover the discussion group is confirmed as the steering committee of the research.

This strategic episode is to become part of a series of future episodes, and the discussion pattern initiated in this episode is expected to become routine over time. This is probably a

good way to connect the episode with the rest of the organization: by granting it a place within the organization's full communicative routine. Finally, ratification appears to be a prerequisite to the work of reconnecting the episode with the organization's daily routine.

As a conclusion, it is important to emphasize that one of the main result of the "termination" phase lays in the changes in the political equilibrium of the organization. Some actors obtain a new organizational legitimacy (the doctor, group chiefs and other middle managers) something which may guarantee the implementation of the program put on the agenda.

## IV. Discussion and contributions

The notion of strategic episode appears to be a relevant point of entry into the strategic development process. This research provides empirical validation of the explanatory power of the notion and its ability to organize the action sequences studied. In this way, the breakdown into three phases –initiation, conduct and termination – turned out to be very useful for describing all of the micropractices at work within each phase. This paper specifically addresses the question of the design and the conduct of strategic episode through the direct observation of a strategy meeting. This question remains less investigated than the alternative question of reconnecting the episode to the organization.

Four main results emerged at the close of the study: (1) the identification of the conditions for the set up of a genuine and free discussion in a strategic meeting; (2) the analysis of the dynamics and internal structure of a genuine and free discussion, drawing on habermas' theory of communicational action; (3) the stress put on the important role played by external facilitators in the initiation and the conduct phases of a strategic episode; and (4) the discussion of some methodological implications, especially with regard to action-research.

1. First, our research confirms that the "free discussion" (Jarzabkowski and Seidl, 2008) appears, among a set of various discussion practices, to have the greatest potential to destabilize the existing strategy. We have demonstrated that free discussion is not an auto-organized phenomenon as it is usually theorized in academic literature on strategic meetings (Hendry, Seidl, 2003; Jarzabkowski, Seidl, 2008). Far from a "self organizing process" supported by "a spontaneous atmosphere" (Jarzabkowski, Seidl, 2008, p. 1405), genuine discussion has to be actively prepared. It supposes a significant amount of design, and requires some specific organizational and managerial conditions to get the active commitment of the participants. With regard to this issue, our research shows how strongly the phase of initiation and conduct are linked. Both of them give rise to micro-practices that will allow free discussion (see Table 1). More precisely, diagnosis plays a key role in the selection of participants by a) representing the variety of opinions, b) determining participants' mastery of their own discursive skills, which are liable to facilitate dialogue, and c) guaranteeing a degree of autonomy in the interplay between stakeholders.
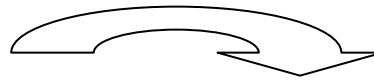
TABLE 1- Micropractices of the actors

**Influence**

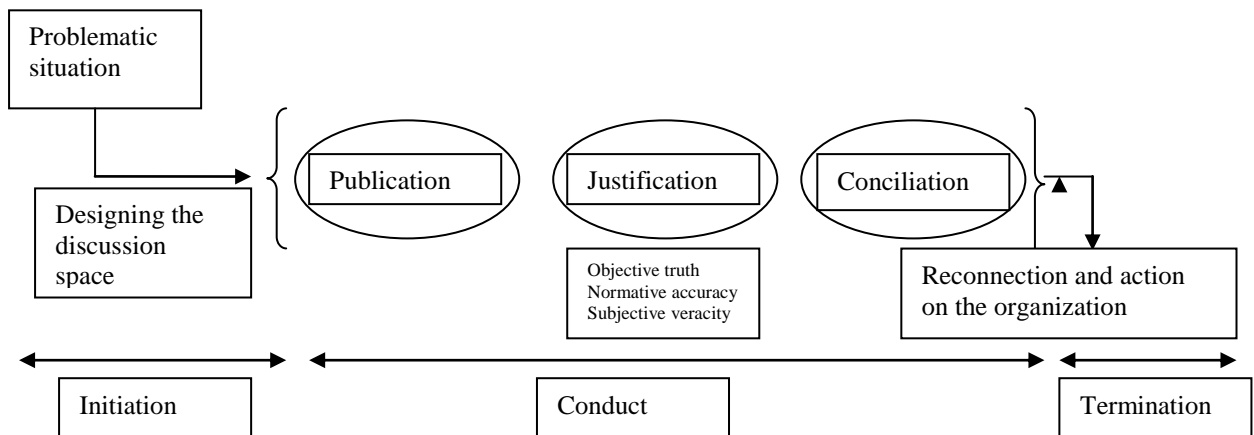| Phases | Researcher micropractices | Stakeholder micropractices |
|---|---|---|
| **Initiation** | • Preliminary diagnosis<br>• Discussion-space design | • DG legitimizes the episode |
| **Conduct** | • Publication of opinions via mirror effect<br><br>• Discussion moderation : giving the floor, joking, mitigating... | • Participants engage in a discussion by sharing arguments that are founded and open to criticism<br>• Publication/justification/conciliation sequences<br>• The consensus reached allows the discussion to be temporarily brought to a close and moved on to another topic |
| **Termination** | • Invitation to ratify the new agreement.<br>• The episode is situated within a series of future episodes in line with conduct of the study | • Validation and ratification of the significance of the episode and follow-up to be provided |

This result stresses the importance of the design of *the* meeting whereas strategizing literature is usually focused on the design of *series* of meeting (MacIntosh, MacLean, Seidl, 2007) which decreases the significance of the conduct of a single meeting. As Schwarz and Balogun (2007) have recently called for, this research gives a better understanding of the conduct of an innovative dialog.

2. Second, to theorize more deeply free discussion, the research draws on Habermas' communicative action theory, which enables the highlighting of problematic communication process that Luhmann's approach ignores. While the notion of the strategic episode is useful for identifying and describing micropractices, it falls short of taking into account what is at play in those practices. In this regard, Jürgen Habermas' communicative action theory provides a useful problem framework while also making it possible to further describe the purely communicative dynamic of the episode. In this perspective, we highlight the structure of the conduct phase of a strategic episode by identifying three steps that shape the discussion among participants.

One of the main findings of this research is that getting the group of managers to adopt a reflexive mindset depends on the occurrence of a stream of discussion phases of the publication/justification/conciliation type. It is in fact via this process that each opinion is evaluated against divergent opinions and multiple potential justification registers. The situation can then be further defined through the range of opinions, and one opinion, when revised, can sufficiently cover the various interpretations in order to lead to consensus. In this three-phase process, the first phase, the publication of opinions, appears to be particularly critical. We know how much political (Janis, 1972), psychological (Festinger, 1957) and cultural (Habermas, 1987) resistance can impede expression of differing opinions. Research reveals the important role played by outside actors in conducting and, even more important,

designing the episode in order to overcome such resistance. By the way, this type of intervention appears to be close to the first stages of Argyris' method to overcome "barriers to organizational change" (Argyris, 1993).

FIGURE 1- Strategic episode and the dynamics of communication.



3. This study shows the importance of the role and micro-practices of the external facilitators in undertaking this type of strategic episode. Several academics have already underlined the importance of external facilitators in strategic episode (Hendry, Seidl, 2003; Schwarz, Balogun, 2007). Our research provides a detailed presentation of the external facilitators' micro-practices that gives rise to lively discussions.

According to Habermas, the communicative action dynamic fundamentally rests on confrontation of autonomous 'yes/no' stances with regard to claims of validity that are open to criticism (p. 87). From this perspective, the role of outside actors involves creating conditions for autonomy. To do so, they have the key task of designing the discussion 'space', largely made possible by the organization's preliminary diagnosis, which in particular focuses on facts and representations related to the problem identified by stakeholders. By drawing on

their own discursive skills, outside contributors are then able to relate the interpretations collected to the stakeholders (mirror effect), thereby initiating the publication/justification/conciliation sequence. Next, the involvement of outside contributors is also crucial during the episode conduct phase. Beyond the fact that they bring discursive skills to bear, the researchers make it possible to depersonalize the opinions they convey where necessary (to initiate or re-initiate discussion, for example) on behalf of and in lieu of the stakeholders. Their presence also prevents regression to mere authority-related argument and supports the 'best argument' principle (Habermas, p. 41). External Facilitators also create conditions for reconnecting the episode with the organization's routines by continuing the study, which ensures that other meetings of the same type will take place with questions regarding the link between change management and health on the agenda.

4. We confirm the key role played by external facilitators, at least at two levels. On the one hand, the research underlines the importance of a set of micro-practices that enable the discussion. On the other hand, this study shows how the commitment of researchers as facilitators along with practitionners is an appropriate means of getting direct access to strategizing practices. Finally, the study of this kind of meeting requires a high level of commitment on the part of the researcher and therefore becomes "engaged scholarship" (Van de Ven, 2007).

The importance of researcher practices with regard to the conduct of strategic episodes raises questions about the appropriate methodology to study strategic-episode, and, to an even greater extent, strategizing. Several studies on management practices opt for ethno-methodology and favour neutral observation (for example, observation of an executive committee meeting). Admittedly, these studies often lead to quite accurate descriptions of exchanges between managers and identification of the discursive skills used, but they do not deeply question the organizational impulses that produce or impede the emergence of

strategic episodes. Our study shows that such impulses can be accessed via the action-research method, as suggested by Balogun and al. (2003). The goal of researcher intervention here is not to offer stakeholders a solution, as a consulting firm would do, but rather to help create organizational conditions likely to allow the organization under consideration to process problems that it had been unable to solve until now. As emphasized above, researcher participation is not limited to moderating a meeting and mobilizing discursive skills; participation was two-fold, with traditional data collection of the various stakeholders' impressions plus organizational design work to create conditions conducive to discussion that are close to the communicative action principle as defined by Habermas. Research and intervention are inseparable here, serving as aids to comprehension and action for the researchers as much as for the organization's stakeholders. Study of the organizational implications of strategy-as-practice thus encourages the development of project engineering for research practices directed toward intervention.

**Bibliography**

Allard-Poesi, F. (2005) The Paradox of Sensemaking in Organizational Analysis, *Organization*, 12: 2, 169-196.

Alvesson, M. et D. Karreman. (2000) Taking the Linguistic Turn in Organizational Research, *The Journal of Applied Behavioral Science*, 36: 2, 136-158.

Alvesson, M. et K. Sköldberg. (2000) *Reflexive Methodology. New Vistas for Qualitative Research*, London: Sage.

Argyris, C. (1993) *Knowledge for Action. A Guide to Overcoming Barriers to Organizational Change*, San Francisco: Jossey-Bass Publishers.

Balogun, J., A. S. Huff et P. Johnson. (2003) Three Responses to the Methodological Challenges of Studying Strategizing, *Journal of Management Studies*, 40: 1, 197-224.

Bird, F. (1990) The Role of "Good Conversation" in Business Ethics, in *First Annual James A. Waters Colloquium on Ethics Pratice*, Boston College, MA:

Boden, D. (1994) *The Business of Talk. Organizations in action.*, Cambridge UK: Polity Press.

Böje, D. (1991) The Storytelling Organization: A Study of Storytelling performance in an Office Supply Firm, *Administrative Science Quarterly*, 36: 106-126.

Eisenhardt, K., M. (1989) Building Theories from Case Study Research, *Academy of Management Review*, 14: 4, 532-550.

Festinger, L. A. (1957) *A Theory of Cognitive Dissonance*, Evanston, Ill: Row Peterson.

Garfinkel, H. (1967) *Studies in Ethnomethodology*, Inglewood Cliffs, NJ: Prentice Hall.

Goffman, E. (1974) *Frame Analysis. An Essay on the Organization of Experience*, New York: Harper & Rop.

Grant, D., C. Hardy, C. Oswick et L. Putnam. (2004) *The Sage Handbook of Organizational Discourse*, Sage.

Grant, D. et C. Oswick (Ed.). (1996) *Metaphor and Organization*, Sage.

Grönn, D. (1983) Talk as a work: The accomplishment of School Administration, *Administrative Science Quarterly*, 28: March, 1-21.

Habermas, J. (1987) *Théorie de l'agir communicationnel. Tome 1: Rationalité de l'agir et rationalisation de la société*, Paris: Fayard.

Hendry, J. et D. Seidl. (2003) The Structure and Significance of Strategic episodes: Social Systems Theory and the Routine Practices of Strategic Change, *Journal of Management Studies*, 40: 1, 175-196.

Hodgkinson, G., R. Whittington, G. Johnson et M. Schwarz. (2006) The Role of Strategy Workshop in Strategy development Processes: Formality, Communication, Co-ordination and Inclusion, *Long Range Planning*, 39: 479-496.

Huberman, A. M. et M. B. Miles (1994) Data Management and Analysis Methods, *in* Denzin, N. K. et Y. S. Lincoln (Ed.), *Handbook of Qualitative Research,* Thousand oaks: Sage, 428-444.

Jarzabkowski, P. (2005) *Strategy as Practice. An activity-based approach*, London: Sage Publications.

Jarzabkowski, P. et D. Seidl. (2006) Meetings as strategizing episodes in the social practice of strategy, *Working Paper*:

Jarzabkowski, P. et D. Seidl. (2008) The Role of Meetings in the Social Practice of Strategy, *Organization Studies*, 29: 11, 1391-1426.

Lewin, K. (1946) Action Research and Minority Problems, *Journal of Social Issues*, 2: 34-46.

Mac Intosh, R., D. Mac Lean et D. Seidl. (2007) Strategy Workshops and Strategic Change, *Working paper*:

Mintzberg, H. (1973) *The Nature of Managerial Work*, New York: Harper and Row.

Pettigrew, A. (1973) *The Politics of Organizational Decision-Making*, London: Tavistock.

Pettigrew, A. (1992) On Studying Managerial Elites, *Strategic Management Journal*, 13: Winter Special Issue, 163-182.

Phillips, N., T. Lawrence, B et C. Hardy. (2004) Discourse and Institutions, *Academy of Management Review*, 29: 4, 635-652.

Pozzebon, M., R. Titah et A. Pinsonneault. (2006) Combining social shaping technology ans communicative action theory for understanding rhetorical closure in IT, *Information Technology & People*, 19: 3, 244-271.

Quinn, J. (1996) The Role of "Good Conversation" in Strategic Control, *Journal of Management Studies*, 33: 3, 381-394.

Rouleau, L. (2005) Micro-Practices of Strategic Sensemaking and Sensegiving: How Middle Managers Interpret and Sell Change Every Day, *Journal of Management Studies*, 42: 7, 1413-1441.

Samra-Fredericks, D. (2003) Strategizing as Lived Experience and Strategists' Every Efforts to Shape Strategic Direction, *Journal of Management Studies*, 40: 1, 141-174.

Schwarz, M. et J. Balogun. (2007) Strategy Workshops for Strategic Reviews. A Case of Semi-Structured Emergent Dialogues, *AIM Research Working Paper Series*:

Vaara, E., B. Kleymann et H. Seristö. (2004) Strategies as Discursive Constructions: The Case of Airline Alliances, *Journal of Management Studies*, 41: 1, 1-35.

Van de Ven, A. (2007) *Engaged Scholarship. A Guide for Organizational and Social Research*, Oxford: Oxford University Press.

Weick, K. E., K. M. Sutcliffe et D. Obstfeld. (2005) Organizing and the Process of Sensemaking, *Organization Science*, 16: 4, 409-421.

Whittington, R. (1996) Strategy as Practice, *Long Range Planning*, 29: 5, 731-735.

Yin, R., K. (1991) *Case Study Research, Design and Methods*, Newbury park, CA: Sage.