

Promoting strategic change: 'playmaker' roles in organizational agenda formation

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- *Effective strategic change depends on an evolving, relevant and timely agenda. A process in which key actors attend to some concerns and sideline others.*
- *This article explores agenda-forming activities in terms of the contributions made by internal change agents who adopt 'agenda playmaking' roles.*
- *The repertoire of these roles is illustrated in one organization via five descriptive metaphors, namely the advocate, champion, evangelist, disciple and broker.*
- *Effective agenda formation requires senior managers to legitimize playmaking activities by promoting organizational norms and rewards whose aim is to align personal and organizational interests and to encourage diverse, yet inclusive contributions.*
- *Managers at all levels should also acknowledge the pivotal contributions of those who prove to be skilled playmakers as well as the value of training to develop skills in the performance of playmaker roles.*
- *Finally, there is much to be gained from the development of a robust, dynamic and comprehensive theory of agenda formation in the strategic change process.*

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Introduction

In the strategy literature agenda formation is often presented somewhat idealistically as preliminary issue diagnosis, an essentially synoptic, linear process of information processing that leads to strategy formulation (e.g. Hofer and Schendel, 1978; Oomens and van den Bosch, 1999). Issue diagnosis allows managers to interpret facts and opinions and thereby discern threats and

opportunities (Jackson and Dutton, 1988), develop future scenarios (Van der Heijden, 1996) and advocate actionable responses (Dutton and Ashford, 1993). These activities are often presumed to be problem oriented, comparatively well structured, intensive and to involve senior managers.

But strategic decision making and change has also been described as sporadic, somewhat fluid, unstructured and incremental (Hickson *et al.*, 1986; Quinn, 1980). From this perspective, agenda forming can be regarded as 'establishing the matters for decision' (Hickson *et al.*). Individuals react to

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evocative, emergent stimuli whose implications are ambiguous. Their concerns may initially be ill focused but ultimately they make sense of an issue and determine appropriate responses by examining cause–effect relationships.

Though organizations may try to implement processes and mechanisms that institutionalize strategic change (e.g. Kono, 1992; Mills and Friesen, 1996), many case studies suggest that issues emerge and gain significance continuously, circumstantially and outside formal structures, planning processes and timetables (e.g. Johnson, 1987; Leavy and Wilson, 1994). The current agenda for action is the set of issues to have gained prominence in the organization from emerging events and concerns. Evidently it is a continuing challenge to pinpoint the unpredictable, inadequately specified concerns that may develop into ‘wicked’ strategic problems needing to be resolved (Lyles, 1987), or as Kingdon (presentation at the Annual Meeting of the American Sociological Association, 1990) asks, ‘... *how do issues come to be issues in the first place?*’

One characterization of agenda formation is that of role-based behaviours, more specifically, intra-organizational issue sponsorship and selling behaviours (Dutton and Ashford, 1993; Dutton *et al.*, 1997). However, agenda formation arguably merits a richer characterization than selling activity, particularly if the aim is to assess the effectiveness of alternative approaches to galvanizing change. This article therefore explores the proposition that issues emerge and are shaped by various forms of individual initiative or agency at multiple levels in the organizational hierarchy.

To this end, it hypothesizes that a definable locus of issue activists or ‘*agenda playmakers*’ contributes significantly to the emergence and diagnosis of particular issues with the potential to achieve momentum for strategic change. ‘*Playmaker*’ is a useful metaphor drawn from football, being the restless, energetic, midfield role that links play, energizes the team and ‘makes things happen’.

The paper introduces some concepts and then explores various kinds of agenda-forming roles within a manufacturing company. Though the precise character of the observed playmaker roles might be firm-specific, it is suggested that there are some general conclusions to be drawn for effective agenda formation.

The context of agenda-forming activity

‘Real-world’ reports of agenda formation emphasize the ongoing diagnosis of significant issues. They suggest that formal routines are often overtaken by the episodic attention that influential managers give to the current concerns they sense to be significant or urgent. Episodes assume the character of ‘search’ routines in which leaders and influential others intervene to acknowledge, reconfigure or otherwise improvise responses to problematic situations (Nelson and Winter, 1982).

This comparatively unstructured quality of agenda formation mirrors two phases of Crossan *et al.*’s (1999) dynamic, exploratory or ‘feedforward’ organizational learning. In phase one, a concern emerges by entering the foreground of an individual’s attention — someone notices and responds to a stimulus, such as an external or organizational event. Building on expectancy (Bruner, 1986, p. 47), individuals amplify and construct meanings out of minimally salient ‘weak signals’ (Ansoff, 1976). They perceive patterns based on their intuition and context-particular experiences and they anticipate the implications of these patterns.

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ownership. It must become salient, socially acknowledged, legitimate and of high priority. Personal concerns compete for collective attention and interpretation (Ocasio, 1997) in a dynamic, noisy arena of transient stimuli, facts and opinions. Organizations differ markedly in how they cope with this ambiguity (Day and Lord, 1992; Kiesler and Sproull, 1982). Whether, how and how fast a concern crystallizes into an issue or item 'on the agenda' depends on who is involved and the opportunities they have to interact and construct the issue through conversation and debate.

Issue identification and interpretation ideally draw on the repertoire of distributed knowledge in the organization (Daft and Weick, 1984; Tsoukas, 1996). Variations in local knowledge require the meanings of ambiguous, potentially interconnected signals to be negotiated before an agreed issue definition and associated implications emerge.

Whilst group influences may constrain idiosyncratic, extreme or dissident views, consensus often proves elusive. In fact, the need for consensus is contentious (Fiol, 1994). One view is that consensus is vital for an issue to progress. Consensus gets an issue onto the formal agenda and gives it momentum, because resource controllers experience pressures to support the actions proposed to resolve it (Hammond, 1994; Plott and Levine, 1978). Consensus can emerge from a shared, public description, notably the attachment of an emotive label that categorizes an issue definitively as an opportunity, threat or crisis (Billings *et al.*, 1980; Dutton, 1986; Ferlie and Bennett, 1992; Starbuck *et al.*, 1978). Issue momentum is frequently aided when the characterization of the issue also points to the means whereby it may be resolved.¹

Others, however, claim that genuine consensus is a myth. Knight *et al.* (1999) find that diversity in the personal attributes and

functional experience of senior managers hinders rapid consensus, a key obstacle being propensity to interpersonal conflict. Actors also mobilize opinion and form coalitions of shared interests. In short, they behave *politically* (e.g. Cyert and March, 1963; Hickson *et al.*, 1986; Lewis, 2002). Self-interested posturing may cement the *partial* recognition of an issue, thereby hindering a broad consensus. Indeed, the ebb and flow of conflict and truce among interest groups may create *ad hoc* mutations in issue definition with unforeseen consequences (Nelson and Winter, 1982).

Alternatively, powerful actors may enforce a quasi-consensus around preferred interpretations and acceptable responses. In so doing, some potential responses are legitimized while others are effectively preempted (Burgelman, 1991; Johnson, 1987). Thus, tactically adroit managers may promote *perceptions* of consensus rather than allow an objective test of it, such as a secret ballot.

However, false or premature consensus is problematic because it implies inadequate exploration of issues. Chattopadhyay *et al.* (1999) find that the outlooks of senior managers converge as they become fully socialized team members, giving rise to the undesirable possibility of 'groupthink' whereby minority or dissenting views are marginalized (Janis, 1985; Nemeth, 1986).² To reduce this risk Wooldridge and Floyd (1990) suggest that senior managers should value and seek out relevant, iconoclastic opinions from middle managers that are close to the realities of the operating environment. However, as the latter become more engaged in issue diagnosis, they too are more likely to accept conventional wisdoms and their iconoclasm ceases.

² Other deficiencies in collective information processing may cause managers to ignore or attend inadequately to significant issues (Schwenk, 1988). These include poor anticipation arising from retrospective or inadequately focused collective attention (Weick, 1995, p. 67). Inadequate motivation may also typify managers who have lost faith in systematic, strategic issue diagnosis in turbulent, unpredictable environments (Engledow and Lenz, 1985).

¹ For example, the BSE and foot-and-mouth crises in Britain and calling the terrorist attack on the World Trade Centre a unilateral *act of war*.

Dooley and Fryxell (1999) also argue that constructive disagreement enhances the quality of issue processing, provided that contributors enjoy mutual trust, loyalty and perceived competence. In these conditions consensus arises out of dissensus, a process that should enhance, not diminish individuals' commitment to proposed solutions.

These various interactive behaviours in and around the organization constitute personal and collective agenda-forming initiatives. At the individual level they can be construed in terms of role-based endeavours that are referred to here, generically, as '*playmaker*' activities. Effective playmakers are likely to

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display a variety of skills that include: imagination, judgement, tolerance of ambiguity and change, articulacy, persuasiveness and determination (Dutton and Ashford, 1993; Dutton *et al.*, 1997; Hardy and Pettigrew, 1985; McCaskey, 1988; Quinn, 1980).

Seniority and status dictate that the chief executive and other senior managers will often be playmakers. But in business as in the political domain, leaders have only a finite scope to dictate the issues for collective attention and the interpretations and priorities accorded to them (Burgelman, 1991; Cobb *et al.*, 1976; Dearing and Rogers, 1996; Dutton and Ashford, 1993; Stone, 1989). ***Agenda playmakers therefore do not always form an exclusive elite.***

Agenda playmakers identify emergent concerns and seek a collective sense of their significance. If ideas and concerns are to make an organizational impact, they *must* have collective attention drawn to them. Cognitive and behavioural factors combine to affect whether an issue crystallizes in the collective consciousness and how it is then shaped. To make effective interventions

agenda playmakers must influence and convince their colleagues to manifest qualities of leadership, irrespective of organizational status (Pettigrew, 1979; Kotter, 1996; Yukl, 1989). For this reason the role(s) of agenda playmakers are of substantial interest.

Individual roles and network linkages in agenda formation

Individuals adopt organizational roles and have roles imposed on them. Roles locate us in positional and relational networks (Biddle, 1979; Burt, 1992; Katz and Kahn, 1978). Role expectations are influenced by personal assumptions, indications from influential others (role senders) and the signals and guidelines embedded in the scripts and stories that encode the organization's 'memory' (Lord and Kernan, 1987; Walsh and Ungson, 1991).

The posited roles of the agenda playmaker are more or less discretionary. Being the products of personal, social and organizational circumstances, they may be improvised and transient, for improvisation is a feature of organizational life (Moorman and Miner, 1998), expressed succinctly by Mangham (1986, p. 65) as:

The perceived freedom to depart from the agreed text . . . to change the emphasis in certain scenes.

Alternatively they may form part of a more systematic, consciously directed effort toward enabling change on a broad front (Buchanan and Storey, 1997; Tichy, 1974).

Roles take on meaning through interaction. Role sender and role receiver interact in dynamic, potentially transient, exchanges or role episodes (Katz and Kahn, 1978). These episodes aid issue diagnosis because they exchange, process and interpret information. A two-person dyad is the simplest form of interaction (Burt, 1992). Information flows may be balanced. When the flows are asymmetric there may be differential returns to the (self-interested) efforts of the two parties. Further, Burt argues that an entrepreneurial intermediary often facilitates

a two-party interaction, aiming to benefit disproportionately from what has become a triadic exchange.

Multiple dyads and triads establish complex interpersonal networks since, as Schoemaker (1993, p. 114) notes:

People . . . seek to be at the centre of several communication networks, functioning as nodes in a continually changing information field.

Those who carefully select and occupy interaction nodes have considerable scope to influence and control flows of information and how it is processed. Burt styles this the *broker* role. Such roles may be highly significant in the formation of organizational agendas.

Networking enables issues to be examined through improvised, exploratory behaviour that contains personal risk because participants explore ideas, claims and promises of support informally and provisionally. While Burt (1992) emphasizes self-interest, the broker can also act more as a sensor than a censor, enabling fluid, agenda formation via the enhancement of the collective knowledge schema (Blackler, 1995; Crossan *et al.*, 1999).

Effective agenda playmakers might contribute to collective issue identification in various constructive ways. A familiar view associated with Jane Dutton and her colleagues' links agenda formation to advocacy, issue selling roles and impression management (Ashford *et al.*, 1998; Dutton and Ashford, 1993; Dutton *et al.*, 1997). To be realized as an issue, a concern has first to be 'sold' to others. Issue selling applies particularly to junior and middle managers that seek to influence senior managers (Floyd and Wooldridge, 1997; Wooldridge and Floyd, 1990). Sellers require credibility, persuasiveness, risk tolerance and access to more senior managers willing to take the role of prospective issue buyers.

Conversely, charismatic, influential senior managers may take pains to convince subordinates of their concerns and what they

consider to be appropriate responses (e.g. Pettigrew, 1979; Kotter, 1996; Senge, 1990). Middle managers, too, influence subordinates as they implement strategy and facilitate change (Wooldridge and Floyd, 1990). The latter are also well placed to transmit ideas laterally as well as vertically (Nonaka, 1988). This reinforces the significance of their roles as brokers. As credible occupants of nodal positions in multiple, interlocking networks (Krackhardt, 1992), they serially exchange, critique and facilitate ideas of perceived concern and relevance. Persuasive, influential communications may often take the form of telling and retelling stimulating stories (Sims *et al.*, 2001; Stone, 1989).

Accordingly, the playmaker role is hypothesized to be multivariate and multi-directional, informed by a variety of logics of action and motives (Dutton and Ashford, 1993). Instrumentality emphasizes concrete, substantive themes and priorities via rational, analytical appeals. Symbolism emphasizes meanings attached to personal and collective identity, reputation and values via emotive appeals.

Motives can be grounded in self-interest, consistent with Burt's (1992) arguments, but they may also be based on perceptions of workgroup or organizational benefit. Role performance above and beyond obligatory task expectations may add particular value to the organization. This 'extra-role' behaviour, also referred to as 'positive organizational citizenship', requires an individual to take charge of the drive for envisioned organizational improvement, a responsibility that necessitates initiative and discretion (Frese *et al.*, 1997; Morrison and Phelps, 1999).

Issue selling in context

The article now reports on the role-based behaviours of some agenda playmakers in a manufacturing company.³ There was a

³ Precedents for the study of *managerial* roles are comparatively scarce (Finkelstein and Hambrick, 1996, p. 37; Fondas and Stewart, 1994), though *inter alia* there have been role studies of leadership (e.g.

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perception from the Managing Director downwards of the need for change. In this respect the circumstances made it a potentially exceptional case worth studying (Starbuck, 1993).

The firm is a medium-sized company with its main operations in a provincial British city. In the mid-1990s it employed several hundred people producing ingredients for the processed food industry. It was one of four firms in a recently formed food products division of a multinational corporation. Divisional restructuring signified corporate commitment to an increasingly dynamic, opportunity- and threat-laden business environment. The recently appointed Managing Director felt under considerable pressure to improve business performance. To this end he had employed a variety of external consultants, both professional and academic.

The firm's management team was mostly white, middle-aged males. The board included the MD and the Finance, Operations and Technical Directors. Below board level an influential group included the recently appointed Product-market manager (who saw himself as Director elect), the IT Director and the managers responsible for business planning, sales, supply chain management and systems development. Three of this group had acquired MBA degrees over the preceding few years. From their accounts it was clear that they could all exercise discretion to advance issues within the organization.

Gurman and Long, 1994; Wesley and Mintzberg, 1989), professional status (Scott, 1995), organizational citizenship (Morrison and Phelps, 1999) and ethics (Kaynama *et al.*, 1996).

When they discussed issues of current concern, informants described associated behaviours, their own and that of others. Their accounts indicated both premeditation and improvisation. A grounded, inductive approach (Glaser and Strauss, 1967) was used to infer over a hundred facets of agenda playmaking behaviour characterized in terms of role metaphors.⁴ Subsequently, informants commented on this analysis.⁵

Archetypes of agenda playmaking

Agenda playmaking behaviours were categorized in terms of (i) the direction of the activity in the organisational hierarchy (i.e. up, down or laterally), (ii) whether the dominant approach was rational-instrumental or emotive-symbolic in its style and (iii) its interest motive as far as could be determined (personal, workgroup-related or firm-centred). Taken together, this would suggest eighteen potential configurations or archetypes of behaviour. For simplicity of exposition five characteristic forms of playmaking in the firm are now presented. They are illustrated using evidence from the managers' accounts.

Agenda playmakers as rational, upward-facing advocates

In this firm upwardly directed playmaking was widely recognized. In the *advocate* role managers promote ideas and concerns via rational arguments. The parallel with legal advocacy is obvious, being for the most part analytical, instrumental and pragmatic. The advocate needs well-crafted arguments, supported by facts and a capacity to anticipate and pre-empt rebuttals from senior colleagues. As the systems manager said of a

⁴ Details of how we arrived at the particular, emergent role metaphors, including inter-coder reliability, are available from the first-named author. But we do not seek to justify any one of the 100+ particular metaphors we derived, since they contribute only to the analysis at an intermediate stage.

⁵ Informants rejected only six metaphors outright, and suggested nine additions. Though we avoid individual attributions here, this approach could be appropriate in personal and team development activities.

proposal to invest in allegedly much-needed IT improvements:

'Senior people like to measure things. Arguments about change are much easier to sustain if you can quantify things. If you want to justify something, get clear measurements of feasibility and benefits, proof on paper. To win the argument, you don't just say, I've got this great idea, what do you think? You are going to get shot.'

The IT Director would have liked to enthuse the MD in favour of these enhancements but he acknowledged difficulty in getting his attention and interest in technical issues. In consequence his rational arguments were scrutinized critically:

'He says, what are the benefits to the business? What's the bottom line? And I say it's very difficult to articulate. That is a challenge for me . . . how best to sell [IT].'

Rational advocacy had persuaded senior corporate managers to sanction major investment in a new factory. During a protracted process in which the case for a new factory had been sustained, advocates linked the proposed investment to a variety of concerns they knew were exercising corporate managers. These included low-cost manufacture, quality enhancement, efficiency and credibility with major customers.

Advocacy behaviour appeared most effective when reinforced by the advocate's perceived status as an expert, able to present contextually persuasive, 'technical' evidence and arguments. For example, the Technical Director had a PhD in microbiology. He drew on this, coupled with his authority deriving from years of research experience in the food industry, to appraise corporate managers of the dangers of bacterial contamination if they failed to sanction investment in a new factory:

'Listeria is a strange organism . . . only about 250 cases per annum in the U.K., yet 150 of those die. Everybody in this room's

got it on their hands . . . one strain in six is very difficult, once it's in your body the chances of survival are limited. There are 36 000 cases of salmonella and about 70 deaths per year. If any food company has a problem with these organisms it is very quickly going to go out of business.'

The problematization of a situation, which may originate from a personal concern, was a feature of advocacy in the firm. The self-interest of the advocate and/or the target of the advocacy frequently contributed to issue advancement. But the unwritten rules required advocacy to have an objective basis. So advocates tried to cloak any self-interest in justifiable business priorities and expressions of the greater organizational good, creating favourable impressions of the issue and of themselves as the harbingers of its significance. Even so the camouflage might be thin. According to the product-market manager:

'I am in no doubt that what ends up on the business agenda is manipulated by people . . . saying hey, I'm up for a game here . . . I've got to shine or make somebody else less glossy than me. Do I try to make that a deliberate issue, do I actively seek to embarrass somebody? . . . games being played on a political level.'

Agenda playmakers as emotive, upward-facing champions

By no means can all upwards issue selling in the firm be described as rational advocacy. Sometimes emotion allied to other factors supported quite partial, even aggressive *championing* of concerns. Again, the Technical Director provided an example. He had been concerned that his own function might be sidelined by the corporate Research and Development function over new product development:

'I went to a meeting and really stirred it up. I told them what they were saying was ludicrous. I came back and said to my MD lunatics have taken over the asylum.'

I created a major issue. People listened. I got a brief to get the corporate technical people focused on what the operating companies needed and why what they were proposing wouldn't work.'

His emotive appeal allied self-interest and a genuine concern for the future of new product development in his own business and it gained widespread attention. Subsequently a small committee of the interested parties reconsidered the question of how best to develop new products collaboratively in the corporation.

Using emotion and polemics to manage the impressions conveyed to others sends a powerful signal that the champion believed an issue was important or urgent. Overt partiality sometimes reinforced the case. Thus the Technical Director, being responsible for setting hygiene standards, had observed to colleagues that in the event of a major problem: *'I would be fighting personally and at the worst I could go to prison.'* Champions claimed that on occasion they were prepared to put their jobs on the line, exemplified by the sales manager:

'If I have a problem with getting an issue on the agenda . . . I give some home truths. You take a chance, don't you? I can get issues raised. I just say what I feel! I wouldn't want to leave the firm but if I had to . . . I don't worry about my job. . . .'

The recently hired Operations Director had also directly tackled his senior colleagues' concerns over inadequate factory performance in emotive terms. To us he said: *'It was really about thumping the table.'* In acknowledging the concerns, he combined emotion with his status as a recently arrived operations expert, saying to colleagues:

'In your minds everything is always a factory fault . . . you have employed me to manage the factories. . . . You're not the experts in managing factories so go along with me until I'm proved wrong.'

The planning manager sometimes manipulated impressions using the emotion of humour to direct attention to issues. Colleagues likened his role to that of 'court jester', confronting them with well-timed, 'foolish' observations that contained significant grains of truth. However, his rapport with the MD reduced the risk of championing issues emotionally:

'I've been brought up here and so has Dick [MD] we have a rapport. I can wander in and say, that's important, we ought to be doing something about that but . . . I don't bring up trivia. We'll have a battle and it'll get quite heated - we'll go away and think about it and talk again.'

Agenda playmakers as downward-facing evangelists

Senior managers were also concerned to promote key issues downward to win subordinates' attention and commitment. The evangelist role appears based on the assumption that ideas expressed via potent, emotive symbols can gain subordinates' attention and galvanize actions far better than rational-instrumental appeals. One manager called it *'the antithesis of the MBA approach'*. For example, the MD was promoting major improvements to work practices, product innovation and customer service in this way. In broad, visionary terms he sought to explain the desired changes to junior staff that might feel threatened by their implications:

'The difficulty is getting the vision of where we are going to everybody and for them to understand it so I hired a public ball and did a presentation . . . providing a vision of where the business should be and actions to meet that vision.'

Similarly, regarding factory procedures, the Technical Director said:

'The total quality process is getting to the hearts and minds of people, it is almost like a religious conversion and to convert somebody you've got to deliver something.'

Most of the management spent a week in a hotel going through the process of converting staff...'

In these episodes senior managers sought to convey their concerns to subordinates using emotive, forward-looking, sometimes visionary language to direct attention and galvanize constructive change. This evangelistic approach aimed to convince subordinates of predefined views and priorities and to encourage their compliance with preferred solutions. The approach required face-to-face contact and concerns were typically presented in a way that sidelined rational debate and mandated actions for which alternatives could not readily be countenanced.

Managers felt this approach shaped subordinates' impressions and attitudes more persuasively than a clinically rational approach. Carefully chosen symbols included potent issue labels that directed attention to the 'appropriate' solution to the problem that the label defined. Crisis is an obvious example. The Technical Director constructed the image of lethal bacteria lurking in every crevice of the old factory as an emotive, vital concern that staff had to combat his way:

'We're in a high-risk business. We're becoming more health conscious as a nation but weaker in our susceptibility to micro-organisms. The bottom line is life and death — if you really get it wrong, you can kill people...'

Similarly, the MD had sought to justify the new factory (codenamed 'Project Eagle') to staff by evoking it as a potent symbol of a resurgent company, of benefit to all its stakeholders — 'the Eagle flies high'.⁶ In retrospect no one felt able to say with certainty where the label originated. But having entered the collective consciousness it assumed meaning and persisted accordingly.

⁶ Pitt *et al.* (1997, p. 24). Conveniently, however, the Managing Directors rhetoric ignored the widespread expectation of factory staff — correct as it turned out — that only a minority would get jobs at the new site.

Middle managers in the firm seemed to expect an emotive, top down approach to big issues. As the planning manager stated:

'Chief executives can have a hell of an impact.... You need somebody at the top giving some very strong signals about values and behaviours.'

But when evangelism fell on deaf ears, impressions could blur, scepticism developed and alternative claims emerged to counter or obfuscate the intended message. Thus 'Total Quality' had been 'on the agenda' for several years. A great deal of money had been spent on external advice about how to enhance quality and institutionalize quality management. Yet it became clear that consensus did not exist over the precise concern that the label 'TQ' represented. In consequence there had been limited agreement over the appropriate changes to be made and little evidence of a concerted effort.

As with other approaches to agenda playmaking in the firm, the evangelist role did not appear inherently biased toward either self-interest or the greater organisational good. Frequently, they went together. For example, few informants doubted that the MD was genuinely convinced of the need for a new factory and improved working methods if the firm was to prosper. However, according to one informant, he also:

'...Stated quite straightforwardly and overtly, "My main aim is to get a new factory built." It's the Mitterand thing. He wants to make his mark, leave something of lasting value for others to remember him by ... to have created something and leave the organization with this marvellous achievement.'

Agenda playmakers as dedicated disciples

So far, agenda playmaking has been portrayed as interactive communicating via words, arguments and symbols. Middle managers, especially, in the *disciple* role promoted issues to subordinates and peers via

exemplary *actions*. These largely instrumental efforts could have a cumulative impact, like persistent rainfall that leads ultimately to a landslide. Such actions — ‘walking the talk’ — advanced issues in ways that subordinates found hard to ignore. The disciple role could require tact, especially when actions spanned functional boundaries, because proponents could not then require sceptics to follow their lead. The systems manager had been engaging in actions to achieve improvements in production efficiency by enhancing an information system. Supported by the IT Director, his aim was to secure:

‘... A groundswell of enthusiasm ... light a bush fire, get the idea to spread ... generate momentum to drive it forwards.’

The changes required apparently unwelcome changes in work organisation, so the initiative had met resistance. There was some risk of an industrial dispute. Still, motivated by a declared sense of the greater organizational good, he continued doggedly trying to persuade staff of the merits of the changes.

Similarly, the Technical Director’s attack on bacteria depended in large part on vigilant disciples prepared to ‘blow the whistle’ on procedural breaches and to ‘make an issue of’ sloppy behaviour in the factory, as a strong signal to others. Thus disciples courted unpopularity, arguably motivated by a sense of positive citizenship combined with task commitment, allied typically with personal loyalty to a more senior figure from whom the policy or initiative derived. The disciple thereby reduced personal risk and might reasonably expect reward if successful.

Lateral agenda playmaking: the democratic broker

The broker role, to use Burt’s (1992) label, was also much in evidence. In fact this role appeared particularly significant, evidenced by the many facets of playmaking that emerged from the language of informants’ accounts. Associated roles included the interpreter, interface, ideas broker, diplomat, depth sounder, bridge builder, opinion

canvasser, mentor and confidant. Individuals originated and traded concerns using their nodal or anchor positions in various relational networks. Peer (as opposed to vertical) communication was a strong feature of this behaviour.

Brokers might combine rational and emotive styles, according to situation. They shaped and channelled peers’ thinking via interactive, often subtle and democratic approaches to issues. As an individual learned more about an issue he might increase his influence on others, leading to *de facto* alliances. As the sales manager expressed it, ‘You get to know the system, the people who will work with you.’

The IT Director explained his broker role among divisional peers:

‘There is a window of opportunity for our four companies.... I’ll say ... hey lads why don’t we all talk together because there is a super opportunity to adopt the same systems ... we might actually all be a bit like each other. But I can’t mandate it. You find your allies and try and promote some enthusiasm.’

Organizational knowledge and perceived expertise aided the brokers’ personal credibility. The experienced supply chain manager saw himself (and was widely seen as) the ‘font of operational knowledge about systems and procedures’, while the Technical Director saw himself (and was widely seen as) as the ‘guardian of product integrity’. A colleague observed of the Finance Director:

‘He is perceived as having power based on knowledge, somebody qualified, something of an expert. There would be a perception generally that issues have moved on to the business agenda through him.’

However, as a comparative newcomer the Finance Director felt that he was still establishing his credibility as a broker:

‘The role of Finance Director isn’t just to run the accounts function, it is to

look at what's happening in all of the business.... When things may be going wrong... I get involved... Being a finance guy is a privileged position, albeit people aren't overjoyed when you come knocking on their door! Sometimes I can make suggestions to colleagues... I say I think there's an issue here, we need to discuss it... It's much better if you get the person most involved to think of it as his idea.'

Brokering was not exclusively peer related. Brokers sometimes facilitated vertical issue selling, as when a credible, more senior colleague promoted an issue upwards on behalf of a subordinate, an example of triadic interaction. The systems manager explained:

'There are key people you bring on board if you want to get issues raised.... Henry... has great knowledge of the organization. He gets respect because of this. He'll listen and debate. If he buys into it your idea you will get support. He's not frightened to raise issues from his position of strength and knowledge.'

Likewise, after promotion, the new MD's predecessor had acted as an intermediary between the MD and the main board to support and craft the case for a new factory.

Brokers also canvassed opinions and acted as devil's advocates. They appeared generally to avoid aggressive issue promotion as culturally unacceptable and counterproductive. Credibility and interpersonal trust appeared key. The planning manager, for example, emphasized that colleagues accepted his constructive critiques precisely because he did not disparage their ideas and concerns lightly. His long tenure with the firm enabled him to offer both prospective and retrospective views on the significance of issues. *Vis-à-vis* named peers, he said:

'We bounce problems off each other all the time. What's expected of us and how it fits in with where the company's going. How we want to restructure it, where people actually fit in. A lot is about communication... trying to...'

influence our peers. It's about networking... talking to people, bouncing ideas off them.'

While self- or group-interests must undoubtedly have motivated some brokering activity, positive organisational citizenship also appeared to characterize much of this behaviour, enabled perhaps by the fact that brokers had relatively homogeneous social and career profiles.

Implications for effective agenda formation

From the findings of this study it appears that there are at least four major factors of more general relevance with regard to effective agenda formation. These are:

- (1) The importance of context, not least senior managers' *assumptions* about appropriate agenda-formation activity in a particular context.
- (2) The degrees of diversity and inclusiveness in agenda playmaking that characterizes the particular context.
- (3) The acknowledgement (or otherwise) of self-interest in playmaking activities.
- (4) The development of relevant personal skills.

A firm's collective approach to agenda formation is shaped by its circumstances. Major contingencies include the nature of the firm's external environment and the

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assumptions that top managers make about the style of agenda formation appropriate to enable constructive strategic change in that context. In relatively stable, unproblematic circumstances, managers may expect or try

to impose a formal, synoptic, optimizing approach. In more complex or turbulent environments, they are more likely to expect and tolerate a less formal, reactive and perhaps more flexible, incremental approach if the firm is to adapt and survive (Burns and Stalker, 1961; Duncan, 1972; Miles and Snow, 1994).

The literature suggests that almost invariably senior managers find it difficult to resist making episodic interventions in response to perceived stimuli. In the firm studied here, senior managers contributed to informal interactions with and among colleagues to highlight organizational issues and relied on major customers for market intelligence. As an example of the latter, the new Finance Director surprised his colleagues by making informal customer visits that led him to articulate new and uncomfortable issues about service levels. Thus agenda playmaking in the firm appeared very dependent on unplanned interventions and informal interactions that were taken for granted by its senior managers.

As regards the degrees of diversity and inclusiveness of agenda playmaking in the firm studied, there are conflicting findings. In the aggregate, individuals certainly adopted a variety of playmaking behaviours. Upwardly directed *advocates* and *champions* are consistent with and expand the general concept of issue selling. The downwardly directed *evangelist* and *disciple* behaviours resonate more with the leadership literature.⁷ The *broker* role was also very significant.

Moreover, the organization contained a mix of outlooks as relative newcomers with MBA qualifications worked alongside those with extensive experience of the food industry in the UK and abroad. However, the locus of active playmaking appeared quite narrowly demarcated, confined to individuals who enjoyed role legitimacy

deriving from their status, seniority, control of resources, technical expertise, political skills and/or charisma.

Further, expectations about playmaking were not made explicit and in a period of transition there was ambiguity over who could legitimately make an agenda play. Organizational norms and procedural constraints could therefore have inhibited effective performance of playmaking roles. Although newcomers and junior staff were in theory free to contribute to issue debates, older and wiser hands tended to be ambivalent or dismissive when they did so, thereby inhibiting interpretive diversity in practice. It seems probable that this may be a more widespread phenomenon (Schweiger *et al.*, 1986).

Given limited diversity, interpretive capacity is constrained. The consensus that may arise over the definition and significance of an issue could then be of questionable value. For example, informants said that meetings might feature 'healthy disagreements' but when the senior team had established a position over an issue, its members would generally resist subsequent attempts by others to get them to reconsider, even in the light of new evidence. Consensus does not then indicate effective issue diagnosis, rather a 'cognitive oligopoly' that does not challenge plausible and familiar (as opposed to valid) readings of positions (Weick, 1995). So the conclusion is that the interpretive capacity of this firm would be enhanced if the locus, diversity and interactivity of its active playmakers were to be extended.

The third factor is the need to recognize the legitimacy of personal and factional interests, provided that they are exercised constructively. Following Gioia and Chittipedi (1991), it can be suggested that senior managers will enhance agenda formation activity if they exchange facts and insights reciprocally with subordinates, particularly since (as Burt, 1992, reminds us) brokers expect reciprocity, whether the exchanges are vertical or lateral.

Exchange should also be enhanced if senior managers adopt reward systems

⁷ There is an analogy between the *evangelist* and Senge's (1990) *designer* who promotes visions of a desirable future. Similarly, the *disciple* makes issues real for others through personal example just as Senge's *teacher* helps others to surface their assumptions and explore issues interactively.

geared to the alignment of individual and corporate interests. This is a challenge, especially in the UK where junior staff have traditionally had few means to draw attention constructively to concerns and those that exist, such as the suggestions box, have become somewhat discredited. Professional staff may also be sceptical and reluctant to share innovative ideas and personal knowledge (Hoopes and Postrel, 1999). For as the Finance Director in the firm noted, when blame is readily attached to those who declare and own problems, there is scant reward for constructive behaviour. Informants referred also to the problem of 'functional silos' that hindered the dissemination of information when there was potential for personal or departmental embarrassment and other negative consequences.

Fourth, there is the factor of personal effectiveness in performing a chosen playmaking role. Effectiveness would seem to depend on requisite personal attributes, skills, commitment, credibility and mutual trust. It must help if playmakers are committed to the constructive identification of issues and willing to exchange ideas and information openly with like-minded colleagues. These attributes and motives evidently build on organizational norms that encourage inclusiveness.

For playmaking to lead to a concrete change initiative, the immediate target of this behaviour has to accept that the concern broached, the role adopted, the playmaker's status, motivation and other personal qualities form a legitimate and credible nexus. Even then, the playmaker must perform the role competently, otherwise he or she will not stimulate interest, diminishing the issue's prospects and losing personal influence for the future.

Managers in the firm generally appeared to recognize and accept the main playmaking roles adopted by their colleagues, few of whom were thought likely to succeed with substantially 'out-of-character' performances. Analysis suggests that individuals sustained two or, at most, three kinds of playmaking roles. Newcomers had to negotiate and establish trust in their roles, which

could prove difficult.⁸ They reported greater ambiguity over role choice, a situation the MD appeared not to dispel and which better-established colleagues tolerated with some unease. Thus the MD's stated attempts to broaden the firm's repertoire of agenda forming skills by encouraging his subordinates to be more proactive playmakers was only partially successful.

The conclusion therefore is that agenda playmaking in the firm would be enhanced if individuals were encouraged to build their personal playmaking skills. Advocacy skills are well understood and certainly amenable to formal training. The champion and evangelist roles are more intuitive, though hardly alien concepts in the world of sales training. The disciple role requires different technical and interpersonal skills but again, finds echoes in well-documented approaches to organizational development and change agency. Only the broker role requires skills of networking that are perhaps underdeveloped in terms of theory, which means that brokers have to develop them largely through practice. Organizational legitimacy and appropriate rewards are important incentives to their development.

The organizational challenge, then, is how to encourage constructive agenda playmaking in practice, with an acceptable balance

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between sensitivity, relevance, partiality, cost and timeliness. Can constructive interventions like those attributed to the Finance

⁸ In fact the Finance Director failed and subsequently quit the firm.

Director be accommodated *alongside* established strategic processes, or must they be accepted (gratefully or reluctantly) as isolated, *ad hoc* events that may be misconstrued or ignored?

There is surely much to gain from the pragmatic integration of formal and informal agenda-forming efforts. On the one hand, systematic, collective attention to a multitude of concerns that anticipate all manner of scenarios, however unlikely, is costly and inefficient. Equally, so too is the consideration of issues belatedly and only when they become emotive crises. The conclusion is that proactive, knowledgeable people at a variety of levels in the organization should be accorded the discretion to explore self-interested and curiosity-driven issues *and to find ways to feed their concerns continuously and constructively* into the more formal organizational processes. Fresh, committed and iconoclastic insights can thereby ally with expertise and prior experience.

Summary and conclusions

Effective agenda formation is a core aspect in the management of strategic change. It has been conceived here in terms of individual 'playmaking' behaviours that contribute to the collective understanding of emerging issues. This study reinforces the claim that playmaking is often the result of informal, role-based initiatives, rather than behaviour mandated by positional or procedural formality. It suggests that playmakers enable the strategic change agenda when they present challenging ideas effectively, building on their perceived expertise supported by relevant evidence and when they appeal to the emotions of others, notably their sense of self and shared interests and their sense of responsibility.

The article illustrates distinct approaches to playmaking in a manufacturing company, taking account of hierarchical direction, personal styles and motives. In general the conclusion is that agenda formation was somewhat inhibited by a degree of reluctance

and inability to adopt appropriate playmaking roles. Nonetheless, in this context the broker role appeared particularly significant, for several reasons. First, this behaviour spanned distributed groups and interests, tending to activate more diverse interpretations than would otherwise have arisen. Second, because of its informal, low-key nature, it may have stimulated earlier, albeit localized recognition of emerging issues, yet avoided premature or superficial consensus to a greater degree than other playmaking roles.

Arguably, as organizations increase in knowledge intensity, brokers with the expertise to span boundaries and interest groups will become increasingly valuable (Allred *et al.*, 1996; Blackler, 1995; Brown and Duguid, 1998; Miles and Snow, 1994). A key point, however, is that by its nature brokering cannot and should not be the exclusive preserve of senior managers.

Senior managers should consider carefully how to enhance the depth, variety and quality of agenda playmaking in their organizations. Enhancement may be achieved in at least four ways, namely by:

- (1) Understanding the importance of context, including a recognition that they may be making potentially unwarranted assumptions about appropriate playmaking behaviour in the organization.
- (2) Legitimizing and encouraging diverse, yet inclusive contributions to playmaking activity, particularly from those who prove to be skilled brokers.
- (3) Promoting supportive norms and appropriate rewards that seek as far as practicable to align personal, factional and organizational interests.
- (4) Offering support for training to develop agenda playmaking skills.

This study affirms the benefit of further work into the characteristics of effective playmaking on three fronts. First, mindful of contingencies and known cautions (e.g. Engledow and Lenz, 1985), formal approaches to agenda formation merit more critical review.

These include the techniques and analytical procedures used to identify and evaluate strategic issues (e.g. Schlange and Juttner, 1997). Thomas *et al.* (1993) and Dutton and Ashford (1993) offer testable hypotheses about the processing and selling of issues.

Second, the effects of self and group interest in relation to agenda formation need to be explored more thoroughly. Personal and factional interests and motives bear on the construction of an issue and how it is advanced (or not). Yet interests are rarely declared explicitly and it is puzzling that these considerations have to date featured much less in the examination of issue processing than they have in decision processing (e.g. Hickson *et al.*, 1986).

A third area for further study links diversity, inclusiveness and consensus. While ultimate consensus may be a necessary outcome for decision making, it is unclear that consensus is an enabling feature of effective playmaking. It may be that effective agenda playmakers resist consensus-seeking behaviour until they have a sense that the time is ripe. Certainly, weak signals cannot logically be expected to attract consensus in their early, emergent stages, hence the effect of achieving an apparent consensus may be to accord some issues undue attention, whilst others become prematurely marginalized.

In short, there is much to be gained from the development of a robust, dynamic and more comprehensive theory of organizational agenda formation in the strategic change process.

Acknowledgements

The authors gratefully acknowledge financial support from the Economic and Social Research Council (grant no. R00023 5429) and the contribution of Nicola Dowds to the collection and analysis of data on which this article draws.

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