

Ritualizing strategic thinking: the effectiveness of the strategic away day

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Introduction

My research is mostly concerned with how managers develop strategy. In particular, how does their strategic thinking become realized in what organizations actually do? Lately I have been concerned with this issue in relation to strategy workshops or away days. Very common in organizations, they are a deliberate attempt to take time out to think about key strategic issues – but how effective are they?

The strategic planning director of a major multinational recently claimed that although his organization ran many such events at considerable cost, he was unsure just what the payoff was. This resonates with my own observations. Either as a facilitator or as a participant, I have been involved in many strategy workshops. Many have been very effective, at least in generating strategic debate. What is often less clear is just what effect they have apart from that. Let me give one example:

The senior partner of a major accountancy firm believed the strategy of his organization needed to change. But he needed to carry his fellow partners with him. He could not simply tell them what the strategy should be: he needed them to think it through and come to their own conclusions. This they did through a series of workshops which seemed to be very effective. When they began the partners were sceptical about the need for change but ended up vociferously demanding that the senior partner take a lead in strategic change. They also identified quite specifically what should be done. The senior partner was pleased with this. Back at head office he decided to roll out the conclusions from the workshop in briefings to other partners and staff. So he approached the partners who had attended the workshops and asked for their help. To his surprise a significant number of them were reluctant and some had decided that what had so energetically been agreed in the workshops was perhaps not so desirable when they got “back home.”

This is not uncommon. Here we have events which can be very effective at getting managers to think about and challenge their strategy, but which so often do not get translated into concrete action. I have been working with other colleagues[1], including an anthropologist, to understand why might this be so and what can be done about it.

Strategy making as ritual

Let's re-consider just what type of event a strategy workshop is. Small groups of often senior executives remove themselves from the everyday, often to quite special locations, where they consciously and deliberately do things differently from what they would do in the everyday. They might employ a facilitator or strategy “guru” to take them through a strategic thinking or analysis process. They challenge and question the precepts of the existing strategy. They might undertake competitor analysis, build scenarios, analyse organizational competencies and so on. This may result in illuminating pictures of a different world and of different needs. They then re-enter their everyday world where things are different. They face the pressures of the immediate; the routines of daily life; the sceptical comments and questions of colleagues who were not at the workshop; the politics of preservation and status. So often the insights from the away day get compromised or simply shelved.

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An anthropologist would readily see the characteristics of ritual in this. Indeed there have also been influential academics who have described strategy making as ritualistic – Henry Mintzberg and Gary Hamel, for example. Their implication is that such ritualized practices are not very meaningful: that rituals are not very meaningful. I want to suggest a rather more nuanced explanation of strategy making as ritual. Such ritualized events are, potentially, very important but paradoxically, often lead to very little. To put it in the language of strategy; the ways in which strategies may be reconsidered and reformulated by means of such workshops can be very powerful, but understanding strategy workshops as organizational ritual helps explain why, quite likely, thinking within the workshops does not get carried forward.

Remember the characteristics of ritual. Removal from the everyday, often to a special place; carrying out of special rites not usually performed in the everyday, but seen as being special; liberation from the burden and limitations of the everyday; but the inevitable return to it. Such ritualised activity has two potentially but paradoxical effects.

Anthropologists argue that such rituals are necessary as a release from and a way of putting the everyday into a different perspective. Also that the very properties of ritual are bound to encourage people to look at things in different ways. One anthropologist talks about participants in rituals going away and having “a whale of a time” precisely because they are in a situation that encourages them to do so. In other words, rituals are *meaningful of themselves*.

We do not necessarily take part in rituals in order that they should have an effect on things; we take part in them because they are important. Moreover, we do not expect what goes on in them necessarily to be reflected in our everyday lives. In fact, quite the reverse. For example, in a tribal ritual participants may debunk the tribal chief: but this serves to highlight the status of the chief outside the ritual. So that which is signalled as significant within the ritual can serve to highlight the importance of the *status quo* outside it.

Translating this in management terms it suggests a paradox: the greater the influence of the ritualised event on encouraging the questioning and challenging of what is normally not questioned and challenged, the less the likelihood that it will transfer back to everyday life. This does not argue that such workshops are necessarily a waste of time. They may well give rise to valuable new insights. What it does argue is that managers should not take for granted that they will have an effect on strategy outside the workshop.

However, understanding strategy-making as ritual also suggests some ways to overcome this paradox; to help managers, not only go away to question and challenge, but to transfer that questioning back to the workplace.

First, managers need to think carefully how to align this design of a workshop with the purpose of the workshop. For example, if the purpose is, indeed, to encourage questioning and challenge of the existing strategy, it may make good sense to increase its ritualization: to remove people significantly from their everyday, physically, symbolically and in terms of the way they usually behave, to introduce ways of thinking about strategy that are novel and challenging for them and perhaps do this with the aid of some highly respected facilitators, consultant or business school. However, there should be no great expectation that insights and conclusions arrived at in the event will necessarily transfer to what the organization does. If, on the other hand, the purpose is more grounded, perhaps to consider how a strategy is to be implemented, then the design of the workshop needs to be different. Less

removal from the everyday, less reliance on novel concepts and approaches and more emphasis on working with the “nitty gritty” of the operation.

Second, if the aim is, indeed, to get people to challenge and question the strategy significantly but there is a need to transfer the insights from that event into what the organization will actually do, then it makes sense to consider a nested series of events. These might begin with more highly ritualised workshops, but be followed up with others that ground the output of the initial workshops increasingly back into everyday practice.

Note

1. My AIM colleagues Nicole Bourque and Shameen Prashantham at the University of Glasgow and Steve Floyd at the University of St Gallen.

References

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