

# Managing Strategic Discussions in Organizations: A Habermasian Perspective

Mathieu Detchessahar ● Benoit Journé

**Abstract.** The paper draws on Jurgen Habermas' theory of communicative action to propose a renewed theoretical framework for "strategy work" (Mantere & Vaara, 2008) and "strategic episodes" (Alvesson & Sandberg, 2011; Corley & Gioia, 2011; Hendry & Seidl, 2003). While recognizing that the use of Habermas is quite problematic in organization studies—largely because his theory deals with democracies and free discussion, which have been presented by Habermas himself as incompatible with any kinds of management and hierarchical organizations—we argue that such a perspective is not only conceptually possible but also very useful for practitioners. In a provocative way, we assume that discussions in organizational settings have to be managed to become free and produce the outcomes expected from a discussion. Our research provides a theoretical framework to describe how interpersonal communication unfolds as well as guidelines, in a normative perspective, for organizing an ideal speech situation in order to support strategic discussion. We identify organizational and managerial conditions for the design and management of "strategic episodes" and "discussions". Finally, our results contribute to the strategy-as-practice and the CCO (communication constitutes organizations) literatures. They are discussed as a way to strengthen the "dialogization" (Detchessahar, Gentil, Grevin & Journé, 2017) discourse that impedes the participation of various groups of practitioners in strategy work.

**Keywords:** Habermas, communication, discussion, strategic episode, strategizing, change

**Mathieu Detchessahar**  
Université de Nantes, France  
mathieu.detchessahar@univ-nantes.fr

**Benoit Journé**  
Université de Nantes, France  
benoit.journe@univ-nantes.fr

## INTRODUCTION

Academic literature has for a long time identified communication as central to but problematic in the realm of organizations (Taylor, 1993) and especially in the domain of strategic management. Communication problems mean that many companies still face difficulties in putting some strategic issues on the agenda (Dutton, 1986) in spite of their importance. The "organizational silence" (Morisson & Miliken, 2000) that stems from established communication routines and the lack of bottom-up and lateral streams of communication call for new management practices (Detchessahar, Gentil, Grevin & Journé, 2017; Rocha, Daniellou & Mollo, 2015) as well as new theoretical frameworks (Detchessahar, 2013).

Recent works in organization science have taken a "linguistic turn" (Alvesson & Karreman, 2000; Vaara, 2010). Concepts such as metaphor (Grant & Osrick, 1996), story (Böje, 1991), discourse (Grant, Hardy, Osrick & Putnam, 2004), talk (Boden, 1994; Grönn, 1983) and texts and conversation (Cooren, 2004; Mengis & Eppler, 2008; Taylor, Cooren, Giroux & Robichaud, 1996) are being widely used in

organizational and strategic analysis. These works that consider organizations as continuous 'discursive construction' (Silince, 2007: 363) have given rise to a new theoretical approach in organization studies, the 'communication constitutes organizations' perspective or, in short, the 'CCO' perspective (Blaschke, Schoeneborn & Seidl, 2012; Putnam & Nicotera, 2009; Schoeneborn, Blaschke, Cooren, MacPhee, Seidl & Taylor, 2014; Vasquez, Bencherki, Cooren & Sergi, 2017).

From the "strategy-as-practice" perspective (Jarzabkowski, 2005; Rouleau 2013; Whittington, 1996), face-to-face communication and discussion are considered important processes of strategy elaboration. Research has highlighted the particular importance of such discussions in supporting innovative processes, especially during those episodes of suspension of established communication routines known as "strategic episode[s]" (Hendry & Seidl, 2003). In order to qualify the nature of communication that occurs in these episodes, notions such as "good conversation" (Bird, 1990; Quinn, 1996), "innovative dialog" (Schwarz & Balogun, 2007), "free discussion" (Jarzabkowski & Seidl, 2008) or "constructive dialog" (Mantere & Vaara, 2008) have been suggested. Such communication processes contribute to the emergence of new forms of "open strategy" (Hautz, Seidl & Whittington, 2017), based on the internal and external "transparency" of strategic information and the "inclusion" of internal and external stakeholders who exchange ideas about strategic issues. One of the main pending questions is about the participation of practitioners (both managers and professionals) in strategy work (Mantere & Vaara, 2008). These authors show that although some organizational discourses promote the participation of various groups of practitioners (i.e. "self-actualization", "dialogization", "concretization"), others remain clearly non-participatory (i.e. "mystification", "disciplining", "technologization").

These academic works about organizational communication strongly echo empirical issues and practitioners' interest in organizational agility. Indeed, many organizations try to develop participative dynamics to overcome the limits of the bureaucratic and hierarchical model of management in a complex and changing environment (external as well as internal). Recent innovations and experimentations such as "Holocracy" (Robertson, 2015) or 'Freedom Inc.' (Carney & Geetz, 2009) call for the participation of stakeholders in discussions and debates about work, organization and strategy, regardless of their hierarchical positions. But practitioners rapidly realized, through multiple hidden resistances and dramatic failures, that discussing and debating in an organization is not as easy as that and does not spontaneously emerge from formal injunctions, incentives or top-down discourses, nor from a culture of discussion held by professional groups. We assume in this paper that strategic discussions need to be managed to be effective. Finally, strategic discussion in organizations is a matter of interest for both academics and practitioners. The former want to define, characterize and qualify it; the latter want to know how to implement it in their organizations.

Thus, this paper is focused on two problems. First, little has been said about the conditions under which strategic conversation, dialog and discussion can occur and produce tangible results in the organization. This point suggests that research efforts should be made to identify and analyze ways to manage conversations (Mengis & Eppler, 2008) and design the organizational settings that support them (Cooren & Fairhurst, 2004; Detchessahar, 2013; Rouleau 2013). Secondly, we think that the wide variety of terms currently used (e.g. good, innovative, free, constructive, conversation, dialog, discussion) to convey a very similar meaning (i.e. spoken communication) is a symptom of a lack of theoretical integration.

This paper draws on Jurgen Habermas' theory of communication to address these two problems and proposes a renewed theoretical framework for strategic episodes (Alvesson & Sandberg, 2011; Corley & Gioia, 2011). The Habermasian perspective is particularly well-suited to our research project. Indeed, it provides a theoretical framework to describe how interpersonal communication unfolds but also, in a normative perspective, offers guidelines for organizing an ideal speech situation in order to support discussion. While recognizing that the use of Habermas's theory of communicative action is problematic in organization studies—not least, as we will see, because of Habermas himself—we will argue that such a perspective is not only conceptually possible but also very useful for practitioners.

First, we show how the Habermasian theory of communication is an appropriate theoretical foundation for the strategy-as-practice approach. From this perspective, we elaborate a model for describing and understanding what is at play in these specific communication processes. In other words, this paper makes the Habermas theory—often considered as highly abstract, almost idealized and quite specific- operational for management issues. Secondly, we draw from this model we draw organizational and managerial conditions for the design and management of “strategic episodes” and “discussions”. Finally, our results will be discussed as a way to strengthen the “dialogization” discourse that impedes the participation of various groups of practitioners in strategy work (Mantere & Vaara, 2008).

These results will be illustrated via an in-depth analysis of a strategic episode that occurred in the French postal service during action-research aimed at raising awareness of the strategic importance to the firm of issues related to occupational health. This case study is particularly interesting because, at the national level, the social conditions and management practices were contradictory with any to Habermas's discussion. But in this adverse context, some local innovations have been implemented with the help of researchers to promote such discussion.

## **TOWARDS A HABERMASIAN PERSPECTIVE ON STRATEGIC EPISODES**

Much recent academic literature has called for an analysis of strategy through managerial practices (Jarzabkowski, 2005; Whittington, 1996). From this “strategizing” perspective, strategy is not only to be found in specific rational, major decisions made by senior managers and planners, but also emerges from the day-to-day micro-activities of a wide range of managers and especially middle management (Rouleau, 2005). The approach builds on the direction of strategic management research initially suggested by Pettigrew's “processual perspective” (Pettigrew, 1973, 1992). From such a perspective, spoken communication is one of the principal of managerial tasks (Grönn, 1983; Mintzberg, 1973). Narrative and discursive approaches have been developed (Phillips, Lawrence & Hardy, 2004; Vaara, Kelymann & Seristö, 2004) through the systematic analysis of the talk, conversation and linguistic skills involved in everyday managerial activities (Samra-Fredericks, 2003). This paper draws on this theoretical framework, oriented towards a discursive approach to strategizing and proposes an original combination of the notion of “strategic episode” (Hendry & Seidl, 2003) with a Habermasian perspective on communication.

## THE CONCEPT OF A STRATEGIC EPISODE

The dynamics of “strategizing” remains one of the key issues in management research. The role of workshops and meetings in strategy development has been explored from the strategizing perspective by a number of researchers (Hodgkinson, Whittington, Johnson & Schwarz, 2006). In order to conceptualize the practice of taking time out from the day-to-day routine to deliberate on strategy direction, recent studies have suggested the notion of a strategic “episode” (Hendry & Seidl, 2003; Jarzabkowski & Seidl, 2006).

Drawing on Luhmann’s (1995) 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 actors themselves. These two temporal limits are of extreme importance to the approach; they delineate a period of time outside the regular functioning of the organization. Regular routines are suspended and replaced by new ones for the duration 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 & Seidl, 2003: 182-184)

In other words, a strategic episode offers a temporary opportunity for a change of strategy: “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 & Seidl, 2003: 176). While the communication that takes place in the episode is detached from the organization as a whole, it must nevertheless, at the end of the episode, be re-integrated into the rest of the organization.

More specifically, a strategic episode is defined as a local and temporary organizational setting structured in three stages and characterized 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 the conditions for effective communication between participants. The conduct process stimulates the auto-organization of the discussion through goal-orientation and time-limitation. And finally, the termination concludes the discussion and reconnects the communicational output of the episode with the rest of the organization.

Much research focuses on the termination phase, and especially on the question of transfer from the meeting to the wider organization (Jarzabkowski & Seidl, 2006; MacIntosh, MacLean & Seidl, 2007; Schwarz & Balogun, 2007). It shows that the design of the series of meetings is one of the main issues in achieving this reconnection. For example, the overall duration of the meetings, the frequency of the meetings, and the seniority of participants appear to affect the chances of a meeting having the intended impact (MacIntosh, et al., 2007).

Finally, figure 1 gives a graphical representation of the structure of a strategic episode, drawn from the existing literature.

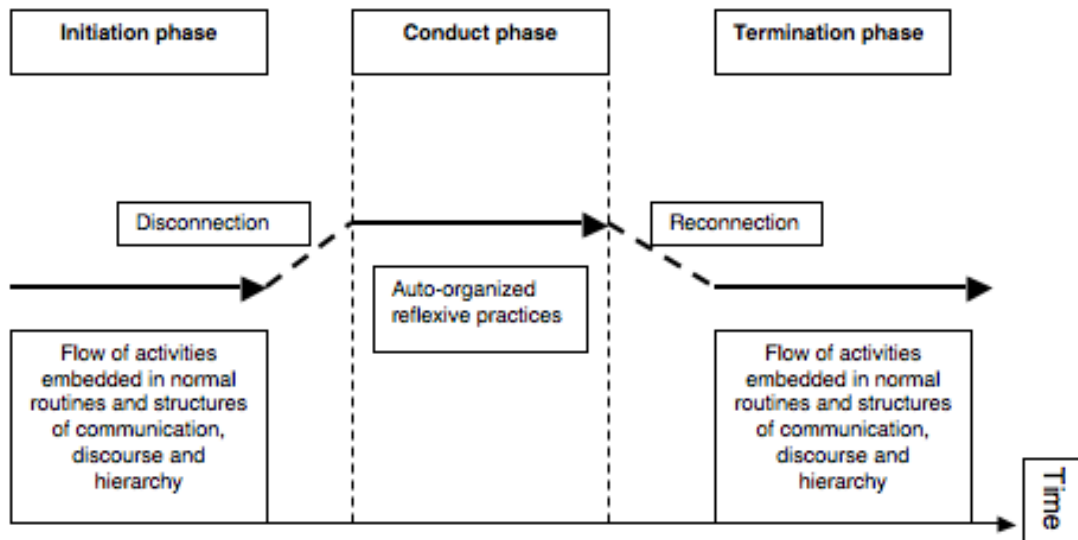


Figure 1 - Structure of a strategic episode

(adapted from Hendry and Seidl, 2003)

In contrast, little is known about the initiation and the conduct phases, which are critical and presuppose a change from the discursive structure of the day-to-day organization, as Hendry and Seidl have emphasized:

*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". (Hendry & Seidl, 2003: 184)*

According to Luhmann (1995), new discursive structures within which the participants can communicate effectively emerge from a process of auto-organization. Drawing on Luhmann's auto-organization concept, Jarzabkowski and Seidl (2006: 25-29) emphasize the key role of "free discussion" in increasing reflexivity, innovation and variations in existing strategies during the strategic episode. Surprisingly, however, they do not highlight the complexity and the difficulty of maintaining such innovative dialog among participants. Management of the episode seems to disappear behind the auto-organization of discussion although many authors emphasize the importance of monitoring sense-making activities (Weick, Sutcliffe & Obstfeld, 2005).

The barriers to free discussion are numerous and varied. Much of the existing literature emphasizes that face-to-face communication is often oriented towards stability rather than change. First, at the individual level, Festinger's theory of cognitive dissonance (Festinger, 1957) demonstrates how individual identity may be destabilized by any process of face-to-face communication that reveals a gap between self-representation and the outcome of "free discussion". Under such conditions, people will try to avoid committing themselves to a strategic episode. Secondly, at the collective level, free discussion can be seen as a threat to the cohesion of

the strategy group. Janis shows how engagement in genuine critical dialog is avoided in order to maintain the cohesion of the group. Janis (1972). In such conditions, face-to-face communication produces collective blindness rather than reflexivity. Thirdly, at the structural level, the critical perspective in organization science emphasizes the link between communication and power. Drawing on Foucault, many authors (Clegg, 1987; Vaara, 2005) believe that structures of power are embedded in communicational practices. From such a perspective, face-to-face communication is shaped by a structure of domination, and also reproduces it. Therefore, far from being auto-organized within the system of communication, “free discussion” and change often only appear as the result of exogenous phenomena. These individual, collective and structural barriers to change can be conceived as defensive routines (Argyris, 1993). What is clearly crucial in the conduct of a strategic episode is the development of managerial practices that can overcome such barriers. Habermas’ theory of communication provides a useful framework for thinking of both the dynamics of genuine communication processes and also the design conditions required to support such processes.

#### A THEORETICAL MODEL DRAWN FROM A HABERMASIAN COMMUNICATION PERSPECTIVE

One of the main difficulties in using Habermas’ theory of communicative action in organization theory is that Habermas himself seems to exclude such a possibility. That is probably the reason why Jürgen Habermas’ work on communication has been neglected in the strategy-as-practice field. Even the few interesting exceptions such as Samra-Fredericks (2005) are very cautious when they mobilize the model. She remained focused on a very narrow aspect of the model – the validity claims—but considered that the whole model as too problematic in organizational settings. In a way, using the theory of communicative action in an organizational context leads to using Habermas versus Habermas. That is why, before presenting the part of the model we will work with, we will discuss the reasons why organization studies, and specifically Strategy As Practice research, should not avoid the Habermasian perspective.

##### *Habermas versus Habermas*

For the German philosopher, there are different types of coordination mechanisms that shape society and our day-to-day interactions. A part of the interactions and encounters in the society are coordinated by communicative action, i.e. by processes of consensus-oriented communication. Communicative action is an important coordination mechanism in the realm of family, friendship, scientific activities, art... and, of course, the democratic public sphere. But steering media (principally *money* for the economy and *power* for bureaucratic organizations) displace communicative action when it comes to the coordination of complex and impersonal interactions as in the realms of the modern economy and work. Steering media function as alternative means for coordinating economic and political transactions “while bypassing processes of consensus-oriented communication” (Habermas, 1989: 183). Therefore, Habermas distinguishes *social integration* from *systemic integration*. The former develops consensus through communicative action, i.e. an inter-subjective action through which “speaker and hearer meet, (...) raise claims that their utterances fit the world (...) and criticize and confirm those validity claims, settle disagreements, and arrive at agreements” (Habermas, 1989, p. 126).

The latter coordinates activities without requiring consensus. Organizations typically belong to the realm of systemic integration. People in organizations do not have to achieve consensus by communicative action because their actions are coordinated, and dominated, by bureaucratic power, organizational hierarchy and market regulation. As we will see, it becomes highly problematic to use the communicative action model in organization studies because Habermas excluded this mechanism from the organizational realm. In other words, it seemed impossible to Habermas to talk about a real communicative action in activities that are dominated by economic or bureaucratic systems.

Nevertheless, following the French sociologist Zarifian (1999), we contend that solid arguments do exist to use Habermas's model of communicative action in organization studies. First, although Habermas is a great political philosopher, he is not a sociologist, even less a sociologist of the workplace. In this scientific area, it is a well-known result that rules and hierarchy are insufficient to coordinate concrete working activities. Working activities and organizations are full of hazards, unexpected events and crises that constrain people to communicate to cope with uncertainty. This result is always verified, even in the context of Taylorism (Dubois, Durand, Chase & Le Maître, 1976). It means that people in organizations are not only dominated by rules and hierarchy but, in certain situations, they must engage themselves in processes of communication in order to make sense of a situation which escapes the domination of bureaucratic power. The type of communication that we are concerned with here is not only instrumental communication only but communication oriented towards meanings and mutual understanding in order to determine goals. A communication that constitutes the essence of processes of sensemaking (Weick, 1995), studied for a long time by organizational scholars.

Secondly, in recent decades, a growing number of practitioners and scholars have stressed the limits of bureaucratic integration and, more precisely, criticized the lack of participation in organizations (Mantere & Vaara, 2008). This lack of participation leads to poorly developed strategies (Floyd & Woolridge, 2000), dissatisfaction among those who are excluded and a lowering of work commitment (Westley, 1990) and consequent difficulties in implementation (Mintzberg, 1994). In a way, Habermas has anticipated these phenomena when he wrote that bureaucratic organizations leads to "symptoms of rigidification combine[d] with symptoms of desolation" (Habermas, 1989: 327). To avoid bureaucratic diseases and promote participation, new managerial practices and discourse appear and support "dialogization" of the organization (Mantere & Vaara, 2008), i.e. managerial practices that involve dialectics between top-down and bottom-up processes. As Mantere and Vaara noticed, this perspective involves the attempt to settle a "constructive dialogue between different groups" (2008: 354). The kind of communication that is involved in this "dialogization" and the conditions under which such a dialog could occur and succeed in organizations must be fostered. From these two perspectives, Habermas's model of communicative action is very powerful both to better understand the functioning of this communication and also to manage concretely what certain scholars have already called "strategic, organizational or work debate spaces" (Rocha. et al., 2015; Detchessahar, 2003, 2011, 2013).

Finally, for these two reasons we consider Habermas as an appropriate and legitimate theoretical background for the study of strategic communication in organizational settings, especially during strategic episodes. Let us present his model of genuine communication in detail.

*Habermas' perspective on genuine communication*

This paper cannot summarize such a rich philosophical work, but merely attempts to point out three of its main dimensions: the conditions through which genuine communication occurs (1.2.1), the new form of legitimacy produced through genuine communication (1.2.2) and the way genuine communication unfolds (1.2.3). To do so, we draw on two of Habermas's major works, which are closely related and necessary to fully understand the processes at play in communication, *The Structural Transformation of the Public Sphere* (his PhD thesis, 1962, 1991) and *The Theory of Communicative Action* (1987).

## Three conditions for a genuine discussion

In his early work on the "Public Sphere" (1962, 1991), Habermas particularly emphasizes the conditions and requirements of "genuine communication" (termed "discussion" in his most recent works) between actors, i.e. a critical discussion free of economic, social or power pressures in which the interlocutors treat each other as equals in an attempt to reach a common understanding on situations or matters of common concern. This question of "discussion" is approached mainly from a historical perspective through the study of the development of a bourgeois public sphere in European coffee houses and salons during the 18<sup>th</sup> century. This is conceived as "the sphere where private people come together as a public to engage [the public authorities] in a debate over the general rules governing relations" (Habermas, 1962, 1991: 28). Habermas underlines that the medium of this political confrontation is "peculiar and without historical precedent: people's public use of their reason" (1991: 28). In this public sphere, "discussion" is supported by a number of institutional criteria: (1991: 36-38): (1) disregard of status—only the authority of a better argument could assert itself against that of social hierarchy; (2) the extension of the domain of common concern, i.e. the progressive end of the monopoly on interpretation by the Church and State authorities and the development of better educated private individuals interested in determining meaning on their own; and (3) inclusivity, as a principle of the opening of the public sphere:

*however exclusive the public might be in any given instance, it could never close itself off entirely and become consolidated as a clique (...), the issues discussed became general, not merely in their significance, but also in their accessibility; everyone had to be able to participate.* (Habermas, 1991: 37)

At this stage, Habermas suggests three very concrete means to design and make possible genuine discussion: (1) the authority is grounded in the quality of the argumentation process rather than the hierarchical position, (2) these argumentation processes are open to anyone who holds a stake or a competence in the problem under discussion and (3) the boundaries of the sphere of discussion are variable, preventing anyone from seizing control of it.

## Creating legitimacy through discussion

In his later works, Habermas emphasizes the important consequences of such communicational processes in terms of the rationality and legitimacy of a decision. In *Theory of Communicative Action* (1987), Habermas introduces the concept of communicative action as a specific form of rationality that can be used in the analysis of the



structuring of modern society. According to Habermas (1987), communication is one type of action. He identifies four main types of action (teleological, normative, dramaturgic and communicative). The question of language and communication is central in the fourth model which is characterized as the efforts of at least two participants to coordinate their actions through the construction of an agreement around a shared situation (Habermas, 1987, 1991: 102).

Whereas instrumental rationality is orientated towards the achievement of concrete goals in real life and succeeds insofar as the actors achieve their individual goals, communicational rationality is orientated towards mutual understanding in order to shape collective agreement. Thus, the aims of the two forms of rationality differ. In the former, the criterion of legitimacy is the effectiveness of the action, its ability to achieve concrete goals. In the latter, the criterion of legitimacy depends on the ability of the speaker to argue for and justify any action, in other words to communicate, in order to shape common goals that require cooperative behavior. Habermas argues that, in spite of the progressive collapse of the public sphere due to our increasingly consumeristic society, the development of communicational rationality remains one of the main tendencies of modern society, which can explain the spread of democratic ideals and the increasing capacity of human groups for reflexivity (Habermas, 1998).

Finally, not only does Habermas give criteria for the design of genuine discussion but he also shows how discussion supports a new conception of legitimacy at the core of modern society. Decisions become legitimate insofar as they are the outcome of genuine process of "discussion".

The Habermasian perspective therefore offers very useful insights into the conceptualization of the discussion process itself.

#### The three stages of the discussion process

Habermas explores the ways communicative rationality operates and provides a real potential for modernization in and reflection on the form of emancipation from all sorts of domination, in particular technocratic and economic. In order to support his conception of communicative action, he specifies three stages that make rationally motivated agreement possible: publication, justification, and reconciliation.

**Publication.** This approach is of particular interest for the analysis of strategic episodes because the question of reflexivity is at the core of Habermas's theory. Indeed, quoting Piaget, Habermas (1989: 84-85) argues that one can reach a reflexive state through a cognitive process of decentration (Piaget, 1950). These processes are best supported by inter-subjective communication insofar as "cognitive development means the decentration from an egocentric understanding of the world" (Habermas, 1987: 85). The public airing of others' opinions gives rise to the process of decentration, i.e. leads participants to examine their own representation through the prism of the others' opinions. In the Habermasian perspective, reflection is supported by the publication of one's opinion within the discussion sphere. It constitutes the first stage of the discussion process.

**Justification.** Discussion is based on a process of "argumentation" which is fed by mechanisms of "justification". In everyday speech, speakers commit themselves to explaining and justifying themselves, if necessary. All speakers claim validity for their opinions and at the same time try to establish that validity by reference to different spheres of validity.

For Habermas (1987, 1989: 115-116), three basic validity claims are potentially at stake in any speech act used for cooperative purpose: objective “truth”, normative “accuracy” (rightness) and subjective “veracity” (sincerity).

- Objective truth means that the participants establish a relationship between their discourse and the objective world of facts and events.
- Normative accuracy means that what is said fits with the normative context of the situation (cultural, organizational rules and procedures, etc.).
- Subjective veracity means that the intention of the actor is really thought or experienced as it is publicly expressed. As Pozzebon, Titah and Pisonneault, (2006) state “subjective veracity is represented by statements expressing the lived experiences in a truthful way” (Pozzebon, et al., 2006: 250).

The success of speech acts depends on their ability to fulfill these three basic validity claims.

**Reconciliation.** A *discussion* is defined as a reflexive activity around the definition of a situation in which participants are involved. The discussion is aimed at achieving a mutual understanding of the situation, rather than agreement on a single interpretation induced by hierarchical pressure or cultural integration. In this context, communication can be considered as genuine and becomes a “discussion”. Indeed, the discussion aims at reconciling the opinions of independent actors. Therefore, one of the conditions for a genuine *discussion* is that all participants express their opinions publicly (publication stage) in such a way that their validity (truth, accuracy, veracity) 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 these opinions. The reflexivity of the communicative action depends on the degree of autonomy allowed in the expression of the opinion. At this point, the older Habermas of *Theory of Communicative Action* meets the seminal insights of the young Habermas of *Structural Transformation of the Public Sphere*. As we have seen previously, the discussion draws on a cooperative logic of the “best argument” (Habermas, 1962, 1987: 41) excluding all motives apart from the cooperative search for validity.

But such genuine *discussions* do not spontaneously and “naturally” occur inside organizations, mainly, as previously mentioned, because of the individual, collective or structural barriers. The free expression of opinions remains especially problematic in organizational contexts that usually promote self-interest and hierarchical relationships. The auto-organization of the discussion inside an episode, as suggested by Luhmann (1995), does not fully address this problem. Following the Habermasian logic, we argue that strategic episodes need to be actively managed in order to produce this kind of genuine discussion. Specific design of the episode based on the three Habermasian institutional criteria seen above, is required to create the conditions for the *discussion*. Rather than proposing a new managerial utopia presupposing equality of status and the disappearance of power and domination structures, the idea is rather to break any monopoly of interpretation and to integrate the existing power relationships in the logic of justification of opinions based on the “best argument” rather than the hierarchical position.

Drawing on Habermas, the contribution of this paper is to provide a conceptual framework that strengthens our understanding of strategic episodes. It highlights both the internal dynamics of discussion processes and also the design conditions under which these processes may unfold.

The following figure gives our model of the discussion processes related to strategic episodes. The model draws from the three-step model suggested by Hendry and Seidl (2003) and applies the Habermasian perspective to the initiation and conduct steps.

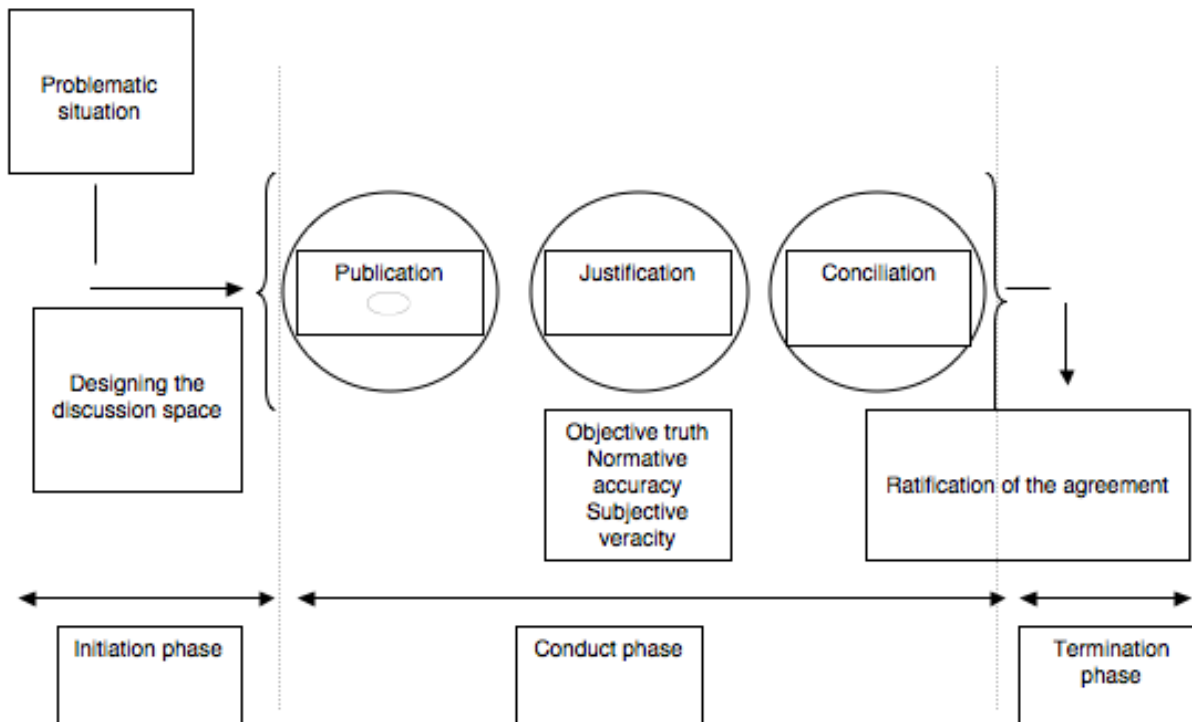


Figure 2 - Strategic episode and the dynamics of discussion

The concrete example analyzed in our case study below provides an illustration of this internal structure of the communicational dynamics of a strategic episode. It also shows that the “Publication / Justification / Conciliation” sequence can be implemented several times, or through several “cycles”, in a single episode.

## RESEARCH DESIGN AND METHOD

### THE CONTEXT OF THE RESEARCH

This action-research is part of a wider research program led by the University of Nantes and funded by the Agence Nationale de la Recherche. This program (2007-2010) gathered some 15 researchers to study the organizational and managerial determinants of health at work, in various organizational settings (hospitals, manufacturing industries, call centers...).

Our study was conducted within the Western Regional Office (*Direction Régionale Ouest*, or *DRO*) of the Mail Management division of the French Postal Service, a service that at that time was undergoing significant changes. Along with the three other operations divisions of the French Postal Service (Express Mail, Post Office Bank, Post Offices), the division now operates in a competitive market. The Mail Management division first faced liberalization of its market in 2006: 46% of its business

faced competition at the time of the study (2006), and the entire business line was in a competitive market by 2011.

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

The DRO employs nearly 4,500 staff, 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 on its operational rate of return, it does not have control over investment policy, nor full control over organizational methods (new tools are designed at national level), nor marketing, since it is not in charge of product innovation. Given this context, management-level decisions carry significant strategic weight for DRO stakeholders. This is what makes it possible to measure one regional office against another, as they are all continuously compared at national level (ranking and benchmarking). Of the criteria used to evaluate the management of regional offices, socio-medical indicators have special significance. From 2005, the DRO saw an increase in instances of medical leave and employees on temporary or permanent disability leave.

The coexistence of issues related to organizational change and work-related health was the impetus behind the request that led to our research team working with this division. First suggested to the management by the DRO company occupational physician, our proposed research project was favorably received by the director of human resources and later the executive director. From the practitioners' point of view our assignment was to study links between DRO work-organization methods, management style and the reduction of work-related health problems. This starting point then constituted the empirical basis of our research questions concerning the design and the conduct of strategic episodes dedicated to work-related health problems.

Considering the national context of this regional initiative, it was a real challenge. Indeed, several official reports (see Kaspar, 2012) stressed the very poor social climate and management practices that led to numerous work-related health problems, including a wave of suicides, and a total lack of trust between different professional groups and hierarchical levels. These reports called for a deep change in management practices and the development of "Grand dialogue". In a sense, the innovation introduced at the DRO by the action-research described in this paper, was an anticipation at a local level of a national plan designed in the 2010s to improve the situation. But the national and the regional levels do not operate the same way and the national level has not yet set up all the conditions for genuine discussions about this kind of problem.

#### AN ILLUSTRATIVE SINGLE CASE STUDY

The field study we carried out will be used in this paper as an illustration of the interest of the Habermasian approach of strategic

episodes to manage discussions and design the organizational settings that support them. The present research is focused on a strategic episode composed of a single meeting, illustrating the richness of the Habermasian model (Figure 2), its analytical potential and also its pragmatic consequences in terms of “actionable knowledge” (Argyris, 1993). This research model is based on a single case study that provides fine-grained qualitative empirical data in the form of rich information about the conduct of free discussion, giving insight into the very nature of the communicational dynamics that can unfold during a strategic episode. Used as an empirical illustration, this case study also gives the opportunity to detail and strengthen the theoretical conceptualization of a strategic episode.

Action-research was chosen for a number of reasons. According to Lewin, the introduction of an intentional change by the research team exposes basic organizational processes that would remain invisible in a passive observation (Lewin, 1946). Furthermore, according to Balogun, Huff & Johnson, (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 the participants become research partners rather than passive informants (Heron & Reason, 2001). In contrast to traditional case and ethnographic studies, which position researchers as interpreters, action research encourages greater self-reflection in the participants and deeper analysis of the structure of this reflexivity (Balogun, et al., 2003).

The present action-research meets the main requirements for “good quality research”, as distinct from “consulting” and “sloppy research” (Eden & Huxham, 1996): the explicit concern with theory. Our study was based on a meeting of senior and middle management and was organized as an interactive discussion group: the participants were invited to participate in a collective discussion about strategic changes in the organization.

It is qualitative research proposing a single-case analysis following the established traditions in organization studies, in particular decision-making and sense-making processes (Allison, 1971; Gioia & Chittipeddi, 1991; Weick, 1993). It is based on ethnographic methods (Garfinkel, 1967; Goffman, 1974) currently used in discursive approaches to strategy and strategizing (Chia & Rasche, 2009; Rouleau, 2005, 2013; Samra-Fredericks, 2003; Vaara, et al., 2004).

The “action” part of our action-research was aimed at breaking the “organizational silence” (Morisson & Miliken, 2000) that sterilized any strategic discussions about the problematic situation described above. The action led by the researchers, as external facilitators, covered the three dimensions of a strategic episode (Hendry & Seidl, 2003): (1) initiation, via the elaboration of a preliminary diagnosis of the situation based on interviews conducted with all the main stakeholders (including the DRO occupational physician), and via the setup of an original steering committee and discussion group; (2) conduct via the facilitation of the discussion (publication by the researchers of the various opinions and mirror effect created by the presentation of the preliminary diagnosis to trigger the discussion); and (3) termination, via the incitation to ratify the outcomes of the discussion.

## DATA COLLECTION AND ANALYSIS

The data collection follows the principle of triangulation (Yin, 1991): interviews, direct observation and document analysis were combined. The corpus of data is mainly composed of two kinds of *verbatim*. The first is the result of interviews with the 12 participants in the strategic episode. These were done individually *before* the beginning of the discussion and were non-directive interviews about the strategy changes faced by the organization and the connections people made with the problems of work-related health. All interviews were taped and fully transcribed (over 500 pages). The second *verbatim* is the recorded, and fully transcribed, three-hour meeting (40 pages).

Audio-recording is often seen as problematic because of the confidential nature of strategy discussion (Jarzabkowski & Seidl, 2006). This problem can be overcome through one of the main advantages of action-research, which creates a close collaboration between the researchers and the participants that in turn generates mutual interest and confidence and, thus, allows the researchers to have direct access to confidential discussions. In other words, working on strategy supposes working with strategists, in a collaborative inquiry. From the perspective of "strategy-as-practice", this methodological orientation permits the gathering of examples of discursive practices and the transcription of the ongoing 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 our analysis on the interpretations and opinions of the actors in the episode.

We carried out a qualitative content analysis of the data (Huberman & Miles, 1994). In a first phase, the *verbatim* were coded with the *a priori* category coding technique using the theoretical concepts of initiation, conduct and termination in the strategic episode; the linguistic skills used by the actors; and the three Habermasian categories of legitimization. In the second phase, new categories emerged *a posteriori* which characterized the micro-processes operating in the three stages of the strategic episode. The content analysis was structured by a double-blind coding process. Both researchers first coded the text individually and then each coding was compared and discussed with the other researcher in order to control for the subjective biases inherent in qualitative research. This kind of action-research can be understood as a double-pronged inquiry: on the one hand, it is about the problem faced by the organization; on the other, it is research into strategic episodes. The second is fuelled by the first. The commitment of the researchers as external facilitators to the first aspect imposes a great reflexive effort on their part, especially considering the mutual influences between the participants and the observers (Allard-Poesi, 2005; Alvesson & Sköldbberg, 2000). And it is precisely this reflexivity that shapes the analysis of the micro-practices at work during the strategic episode considered in the current research.

## **RESULTS: THE STRUCTURE AND CONDUCT OF A STRATEGIC EPISODE WITHIN THE WESTERN REGIONAL OFFICE OF THE FRENCH POSTAL SERVICE**

This research provides a detailed description of the main communication dynamics that unfold during a strategic episode. It reveals the internal structure of such an episode and highlights the need to actively manage the initiation phase as well as the conduct of the discussions all

the way to the end of the episode. The case study of the French Postal Service illustrates the relevance and the interest of the Habermasian model we propose in this paper.

#### THE INITIATION PHASE: PUTTING THE ISSUE ON THE AGENDA

For Hendry and Seidl, "**initiation**" serves to make communication between stakeholders possible. From the chosen Habermasian perspective, the challenge at this stage is to design a discussion 'space' in such a way that the expression of autonomous opinions is made possible. Our study started with the researchers' diagnosis of the problematic situation. We argue that this diagnosis is required to identify (1) the relevant stakeholders that should be involved in the discussion sphere and, also, (2) to aid the expression of individual opinions in the later face-to-face interviews. At this stage, two important criteria given by Habermas concerning the design of a discussion sphere were introduced, i.e. opening the argumentation process to all stakeholders in the issue under discussion; and grounding authority in the quality of the argumentation rather than hierarchical position. The political as well as the cognitive dimensions of the initiation of a strategic episode will be illustrated in details throughout the example.

The first phase of our work involved a series of 12 one-to-one interviews with six DRO executives (functional managers), two company occupational physicians and four operational managers (plant managers and a group chief), focusing on the nature of organizational changes at the Postal Service, how those changes take place and the health status of the personnel.

These interviews offered an initial insight into the managers' opinions. It emerged that work-related health was an issue that senior management, operational managers and occupational physicians alike considered of central concern for the DRO, but viewpoints differed as to the causes of these health problems, differences that had never previously been publicly discussed.

Senior management was very aware of the negative impact that work incapacity has on productivity:

*It is generating incompetence, exasperation, people putting themselves on leave, temporary incapacity 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 occupational physician)*

For their part, in addition to incapacity-for-work issues, operational managers emphasized an upsurge in unexpected short-term absenteeism, which is deeply disorienting 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 differed as to the causes of these health problems. The regional director was quite insistent that the DRO is changing, along with French society as a whole, and he maintained that the individual's sense of identification with his or her employment is weakening and is increasingly marked by complaints and conditional involvement.

At the same time, operational managers, and some functional directors, focused on the amount of change, poor change management on the part of the DRO, and a lack of transparency as the chief problems. The deeper reasoning behind the reorganizations seems to have passed the employees by, and this complicates their management efforts:

*This is why, in our unstoppable cycle of reorganizations, we generate incapacity 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 is stopping 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 be aware of is that there is poor communication 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)*

However, the interviewees agreed on the difficulties in understanding health problems and addressing the issue of incapacity for work in particular. Some even cited instances where discussing the problem was avoided, something the management team has reportedly been unable to address collectively:

*How do you deal with incapacity for work—no one knows how, really, but we continue to create it without knowing. Incapacity 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 [operations committee], meaning when we have DRO staff plus all plant managers, and we want to put incapacity 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)*

*Incapacity 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*



*incapacity 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 occupational physician)*

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 working-party session be convened to address 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. At the time of our intervention, 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 and 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 when the regional director meets with the 40 plant managers.

With management's consent, a decision was made to break with these communication routines for two main reasons: (1) up to that point, they had proven incapable of addressing the health issue question, and (2) no routine meeting was likely to cover the spectrum of viewpoints gathered via the interviews. A three-hour working party 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).

The external facilitators, i.e. the researchers, played a key role here, initially in 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 occupational physician. No existing committee structure united representatives of all these stakeholders at once, meaning that previously no meeting of central office decision-makers and decision-makers in the field, down to plant manager level, had occurred. Furthermore, the company occupational physician had never participated in DRO management communication routines; his participation was suggested not just because he had expert knowledge and would therefore be likely to have insights on the subject, but also because, given his protected employee status, he benefits from greater freedom of expression than the managers. During interviews we also verified that the occupational physician 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.). In addition, the external facilitators developed an agenda, taking care to:

-Situating the 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 management and involve them in the meeting by asking them to convene the meeting participants.

External facilitators were also presented as required to moderate the meeting. Taken together, these efforts helped to design a discussion 'space' that was open to a strategic-episode opportunity.

Finally, the concrete example given by this case shows that the managerial initiation of a strategic episode is not spontaneous and requires a diagnosis that creates the political conditions (stakeholder involvement) as well as the cognitive conditions (individual opinions) for a free discussion at the next step of the episode (i.e. the conduct phase).

#### EPISODE CONDUCT: THE UNFOLDING OF A DISCUSSION PROCESS

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

The design of the discussion 'space' should make it possible to stimulate discussion and provide an interpretation of the comments made during the interviews, which, at this stage, have not yet been collectively addressed by the group. When presented by the researchers, these comments are distanced from their authors, making them easier to criticize; they are also less likely to be challenged for the sake of mere authority-related argument thus requiring people to justify their stances through reasoning. When placed in a situation requiring dialog and faced with differing interpretations that are difficult to dismiss in an authoritarian manner, the stakeholders are also forced to compare and align these interpretations to resolve any disagreement.

The following is the initial opinion (i.e. the first yes/no stance taken on a topic), the discursive strategies used and the justification 'class' (validity claim) referenced.

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

The researchers, having a moderator role, opened the discussion. They put up for discussion an initial, controversial, interpretation, collected during the individual interviews (initiation phase). This initial interpretation could be summarized as follows: "The Postal Service's poor change management is one reason behind the current employee-malaise issue" (**interpretation 1**). This interpretation was made public in the sense that it was given to all stakeholders, thus creating a system around the issue of health and change by involving top management, middle management, operations management, an occupational physician, HR and

so on. Interpretation 1 was also justified with reference to the subjective realm, in the sense that it was presented as the result of the researchers' personal appropriation of views held by the stakeholders with whom they had met (line 12). This justification, based on *veracity*, allowed the researchers to emphasize that they were merely trying to understand the stakeholders, with no strategic or teleological desire to impose a solution, and for this reason the interpretation deserved to be discussed. This call for discussion was reinforced by the 'softening' discursive strategy (Samra-Frederiks, 2003) that can be clearly seen being used by the researchers at the start of their intervention (lines 1-3).

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

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

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 reduce employee welfare" (**interpretation 2**). This interpretation is justified in reference to an objective realm of objects and people. In *truth*, the way changes are made was significantly altered in early 2007, moving toward more consultation with field managers and greater crosscutting. It was the human resources management team, and not the production management team, that led the change process overhaul, signaling a significant paradigm shift. It should be noted here that the argument behind this second interpretation is presented via various discursive strategies related to the director's dramatic behavior, 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 underlined the relevance of the researchers' interpretation several times, which he 'limits himself' to putting back in its historical perspective ("*It's dated*": line 25, "*It's no longer true*": line 19). His strategy therefore involves humoring 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, which threatens to stir up criticism and

opposition or bring the discussion to a premature close, another participant attempted a conciliation by proposing an interpretation that overlapped the first two just enough to create agreement between the two parties and get the discussion going again. This trouble-shooter was the human resources director:

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

We see that he, too, used history to offer the parties a middle-ground interpretation. What he was in effect telling us was that the past is not so long ago, and the situation described by the researchers is indeed one that still exists, even if the tools that will make the resolution of these problems possible have been in place for two weeks. He, too, justified his stance with *truth* and with reference to the objective realm, but he indicated that, while the solutions are indeed in place, their concrete implementation cannot yet have changed how employees experience the way change is occurring. He refined the researchers' interpretation by taking the current reforms into account and refined the executive director's interpretation by taking the very recent nature of the change into account, which explained the data collected by the researchers. He also proposed a third, conciliatory, interpretation that both enhanced the researchers' and executive director's interpretations and offered an end to the disagreement. The participants accept this closure. The researchers do so explicitly:

1	<b>Researchers:</b> You are going to see, we also have a board on that. That means, well, I
2	am in fact going to let you talk, and you are quite right, but don't worry if that seemed
3	to us pretty common in the interviews; but don't worry, what you were saying earlier
4	also is, but we chose to put that on another, on another board that we called...
5	<b>Operational manager:</b> Hopes?
6	<b>Researchers:</b> Um no... 'Managerial reaction' – that's better, no? (Smiles.) That is,
7	in view of this, there have already been managerial reactions and that's another slide,
8	and in a moment we'll come back to 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 accepted this new middle-ground interpretation. Once conciliation had occurred and agreement had been reached on a joint interpretation, new discussion possibilities opened up around new questions. Here, the discussion was taken up by the company occupational physician, the stakeholder with the greatest autonomy vis-à-vis the organization and its management. The occupational physician brought up the actual content of change-management reform at the Postal Service: Are the innovations that have been implemented able to solve employees' work-related health problems, and those of plant managers in particular?

1	<b>Company occupational physician:</b> That said, if there is a joint meeting, that can only be
2	for the good, but you scare me by mentioning the lack of leeway, of negotiation – if there
3	is any! You said...
4	<b>Executive director:</b> Well, yes.
5	<b>Company occupational physician:</b> If no negotiation takes place, if they [plant
6	managers] don't have any leeway...
7	<b>Executive director:</b> There always is ...
8	<b>Company occupational physician:</b> There will be the same feeling [pressure and lack of
9	listening].
10	<b>Executive director:</b> No, no.
11	<b>Company occupational physician:</b> That is to say, even if we do explain to them what is
12	going to happen, what was missing, well, I felt that they were being presented with a
13	'done deal'; there wasn't enough time between roll-out and awareness of what was going
14	to happen – that has already been improved quite a bit, but if we tell them and tell them
15	often, this is what we intend, plant managers, in any case, what are they retaining from
16	your plans, I have to do -4, have to do -2 etcetera, and after that they cut where they can
17	without taking into account...
18	<b>Executive director:</b> No, no...
19	<b>Company occupational physician:</b> I'm exaggerating, but still, for us, in our minds, this
20	is what we see, this is what we see, in the [name of the city] plan, I'm sorry for the
21	minimal information here, but the difficulties that we encounter, from a, well, human
22	point of view, are related, because four routes were eliminated; I mean, two of the six
23	routes in St Luce, so, and it's not the two routes that should have been eliminated, that's
24	another subject, but...
25	<b>Executive director:</b> So we can discuss that, it's true, afterwards...
26	<b>Company occupational physician:</b> From a human perspective, incapacity-for-work and
27	then occupational health indicators perspective, that will be very costly to you afterwards;
28	I'm telling you, it has even started.
29	<b>HR director:</b> Well, we'll see about that.
30	<b>Company occupational physician:</b> Well, it's a sure thing.
31	<b>HR director:</b> I'm not so sure of that.
32	<b>Company occupational physician:</b> I know it to be true.
33	<b>HR director:</b> Because already there is very little exchange, what I mean by that is
34	words, even to jointly say that it is having a negative effect, for me, they can say that it's
35	having a negative effect...
36	<b>Company occupational physician:</b> Yes, but it's passive listening, they want active
37	listening...
38	<b>HR director:</b> That's already done.
39	<b>Company occupational physician:</b> Yes, but they want active listening....
40	<b>Group chief:</b> Work needs to be done...
41	<b>Company occupational physician:</b> They'll very quickly become frustrated, they'll say –
42	well, me, I'm quite afraid, I don't know how, what you think, but it's good already but I'm
	telling you...
	<b>Group chief:</b> I think that work needs to be done on both sides, that is to say, as much as
	there is indeed work to be done on training, taking elements into account far upstream,
	there also needs to be, what is more, this community that is emerging and that up until
	now was led, well, takes its share of responsibility and understands that we are working
	under significant constraints and that negotiation in spite of everything is, well, or leeway,
	is limited, in any case, in the areas that concern them, which are pure productivity, and
	that negotiations have to be shifted to other areas. but productivity and timelines, because
	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 occupational physician was questioning the reality of the change as presented by the executive director. In the end, her interpretation was as follows: “The health problems stem from the fact that management are 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” (**interpretation 4**). The company occupational physician was 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 line 15, 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 16-19). This justification, referencing the objective realm of facts, allowed her to remain in discussion with the executive director, who did not end the discussion. Nonetheless, interpretation 4 was also contested by the HR director (line 25), who seemed to suggest that “the principle of active listening is already in play” (**interpretation 5**), which the company occupational physician continued to contest (line 31). Given the scattering of interpretations, an attempt at conciliation (**conciliation 2**) was made by a group chief (lines 35-42), who expressed **interpretation 6** as *veracity*, which involved presenting both senior management and plant managers with their

respective responsibilities: “everyone will have to progress a bit in regard to his or her perception of the problem” (**interpretation 6**).

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

1	<b>Executive director:</b> So these [management reforms conducted], in my opinion, these are
2	elements that also apply to the next six to eight months...
3	<b>HR director:</b> It's the starting point.
4	<b>Executive director:</b> Yes, we'll see.
5	<b>HR director:</b> So we'll see if...
6	<b>Executive director:</b> I think that it won't be the same; otherwise, that would mean we
7	have messed up...
8	<b>Company occupational physician:</b> No, I mean that is what has been done. But I was
9	playing devil's advocate a bit, because I think it's important...
10	<b>Executive director:</b> Yes of course, but I, once again, I started... I'm not criticizing at all.
11	Historically... I simply wanted to say, well, you know, it's dated, I hope that it's dated.
	<b>Researcher:</b> 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 can be 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, “*I think that*”–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**, 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 a follow-up to the study.” This interpretation serves as a central reference point in future discussions and research. We can see here just how much initial **interpretations 1** and **2** were enhanced through being discussed without being dismissed, and we will see how **interpretation 7** enables the group to take action with regard to health issues that the group had failed to grasp 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 participants in a position of addressing an interpretation not yet discussed as a group. A set of discursive skills and strategies is necessary here to open up those interpretations, which the social body had until then kept far from public discussion. The second phase is the *justification* phase: what arguments enable the taking of a public ‘yes/no’ stance? Different justification registers are used here: *truth*, *veracity* and *accuracy*, as clarified by Habermas's 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 emerged three times during our meeting with regard to three different topics, each being the focus of discussion in the strongest sense of the term, that of public, critical discussion of opinions:

-Poor change management, which lies at the core of the health problems and quality of the 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.

Table 1 gives a synthetic representation of the discussion dynamics during the conduct phase. It shows the cyclical shape of such dynamics based on the repetition of the basic structure *publication—justification—conciliation* (as referred to in Figure 2). The first column of the table presents the opinions as they were expressed by the actors and that fed the discussion. The second column associates these opinions with the justification categories drawn from the Habermas theoretical framework. The third column presents the interpretations that emerged during the discussion to move towards a conciliation position.

	Publications	Justifications	Conciliations
Cycle 1	<b>Interpretation 1:</b> The postal service's poor change management is one reason behind the current employee-malaise issue ( <b>Researchers</b> )	Subjective veracity	
	<b>Interpretation 2:</b> Change management currently is not an issue likely to reduce employee welfare ( <b>Regional Director</b> )	"No" position, objective truth + Normative accuracy	
		Objective truth + Subjective veracity	<b>Interpretation 3:</b> The postal service's poor change management caused the health problems encountered today, but recent managerial innovations provide hope for future improvement ( <b>HR Director</b> )
Cycle 2	<u>Interpretation 4:</u> The health problems stem from the fact that management are 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 ( <b>Company Occupational physician</b> )	"No" position Subjective veracity	
	<b>Interpretation 5:</b> The principle of active listening is already in play ( <b>HR Director</b> )	Objective truth	
		Subjective veracity	<b>Interpretation 6:</b> Everyone will have to progress a bit in regard to his or her perception of the problem ( <b>Group Chief</b> )
End of the discussion	<u>Interpretation 7:</u> "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 a follow-up to the study." ( <b>Researchers</b> )	Subjective veracity	

Table 1 – The cyclical discussion dynamics

## THE RATIFICATION OF CHANGE

The question of reconnecting the outcomes of discussion with the routines of the organization is beyond the scope of this research. Yet, it is important to mention 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 concluded with a final-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 encapsulated the group's agreement regarding the innovative nature of the episode:

1	<b>Personnel Officer:</b> I for one am very interested and feel that a lot has been shared. I
2	also think that this may be the first time we have shared so much with each other...

Once this ratification was obtained, the meeting concluded with a discussion involving the executive director, the HR director and the other participants regarding how they would now organize the continuation of the study. This ratification meant that the problem of organizational change and work-related health was now on the agenda. Therefore, the members of the organization could legitimately spend time on this topic and support the researchers in their fieldwork. With this perspective in mind, four plants were chosen for investigation. A series of meetings was planned with the HR Director in order to collect HR indicators on work-related health. At the same time the role of the company occupational physician had dramatically changed, shifting from a role of health expert to a role of partner with the managers involved in organizational change.

Finally, it is important to emphasize that one of the main result of the strategic episode phase lies in the changes in the political equilibrium of the organization. Some actors have obtained a new organizational legitimacy (the occupational physician, group chiefs and other middle managers), something that may guarantee the implementation of the program put on the agenda. The strategic episode stands apart from the logic of power, but it does recalibrate the political structure through communicational logic.

## DISCUSSION AND CONCLUSION: TOWARDS A HABERMASIAN PERSPECTIVE FOR THE MANAGEMENT OF DISCUSSIONS DURING STRATEGIC EPISODES

This article addresses the issues of the design and the *conduct* of strategic episodes through a Habermasian perspective, illustrated by the direct observation of a strategy meeting. Three main results emerge from the study.

First, we have demonstrated that free discussion is not necessarily an auto-organized phenomenon as is usually theorized in the academic literature on strategic meetings (Hendry & Seidl, 2003; Jarzabkowski & Seidl, 2008). Far from a "self organizing process" supported by "a spontaneous atmosphere" (Jarzabkowski & Seidl, 2008:1405), genuine discussion has to be actively managed. This presupposes a significant amount of preparation, and requires specific organizational and managerial conditions aimed at encouraging the active commitment of the participants. This result is relatively convergent with the analysis of Mantere and Vaara (2008). The question of participation is crucial and is closely linked to various and contradictory organizational discourses. Our paper offers the



opportunity to deepen the analysis of the “dialogization” discourse they identified as a way to include various groups of people in the strategy work and associated it to Habermas’ ideal of social organized dialog.

Our research shows how strongly the phases of initiation and conduct are linked to this issue. It must be emphasized 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 another. In other words, the choice of participants is informed by prior diagnostic work.

The preliminary diagnosis also plays a key role in fuelling the upcoming discussion and preventing instances of sterilized group discussion. The one-on-one interviews conducted in-company made it possible to reveal, collect and classify stakeholder perceptions. During later discussion, participants had the opportunity to put forward their perceptions to the others while, at the same time, these perceptions were depersonalized, i.e. conditions were created whereby the individual who offered these perceptions was forgotten so their inclusion in a critical discussion was thereby facilitated.

To summarize, diagnosis plays a key role in the selection of participants by a) collecting the variety of opinions; b) determining participants’ mastery of discursive skills that are liable to facilitate dialog, and c) guaranteeing a degree of autonomy in the interplay between participants. This illustrates in a very concrete manner the way the Habermasian criteria of design can be implemented to support a discussion process.

This first result reinforces the relevance and legitimacy of Habermas for the study of organizations. It calls for a more intensive usage of Habermasian communicative action theory in the realm of communication-centered and discourse-centered approaches in strategy and strategizing (Kwon, Clarke & Wodak, 2014; Mantere & Vaara, 2008; Samra-Fredericks, 2005; Vasquez, et al., 2017).

Secondly, we highlight the structure of the conduct phase of a strategic episode by identifying three steps that shape the discussion between participants: getting the group of managers to adopt a reflexive mindset depends on the occurrence of a series of discussion phases of the publication/justification/conciliation format. It is via this process that each opinion is evaluated against divergent opinions and multiple potential justification registers. The issue can then be further defined through the range of opinions, and one opinion, when revised, can sufficiently encapsulate the various opinions to lead to a consensus. In this three-phase process, the first phase, the publication of opinions, appears to be particularly critical. Knowing how significant individual (Festinger, 1957), collective (Janis, 1972), and structural (Habermas, 1987) resistance can be in impeding expression of differing opinions, our research reveals the important role in overcoming such resistance played by outside actors through conducting the episode and, even more importantly, constructing it in an appropriate manner. In this process, power does not disappear, but it is challenged and reorganized by communicational rationality. In other words, differences of status remain, but the communicational logic creates the opportunity for certain actors to obtain a new legitimacy based on the strength and the relevance of their arguments publicly expressed during the discussion. In our case, the role played by the DRO occupational physician during the discussion and the impact of her arguments on the collective understanding of the problematic situation revealed important changes in the power balance inside the DRO board of directors. The

occupational physician, who was initially isolated from managers and trapped in her professional position and identity, became a real discussion partner for senior managers, associated with management and strategic decision making. But this new position in the game wasn't that easy for her, especially vis-à-vis her own professional group (some DRO occupational physicians see themselves as having classical counter-power but not as partners for strategic management issues). In a similar way, senior management may reinforce its position and "renew" its power when engaging in a new and wider process of legitimacy, one not only based on hierarchical or traditional legitimacy but also on discursive legitimacy, as outlined in Habermas's theory of communicative action.

Thirdly, this study shows the importance both of the role of the external facilitators and of their micro-practices that will allow free discussion (see Table 1). The importance of external facilitators in strategic episodes has been underlined in a number of studies (Hendry & Seidl, 2003; Schwarz & Balogun, 2007). Our research provides a detailed presentation of external facilitator micro-practices that encourage productive discussion. According to Habermas, the communicative action dynamic is fundamentally based on the confrontation of individual 'yes/no' stances with claims of validity that are open to criticism (1989: 87). From this perspective, the role of outside actors involves creating conditions for autonomy. One of the key tasks in this role is that of designing the discussion 'sphere', a task largely made possible by the preliminary diagnosis of the organization, which should, in particular, focus on facts and representations related to the problem(s) identified by stakeholders. By drawing on their own discursive skills, outside contributors are then able to relay the interpretations collected to the stakeholders (mirror effect). 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 the depersonalization of the opinions they convey possible 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, 1989: 41). Yet, it remains obvious that researcher micro-practices were influenced by those of the stakeholders. In a certain way, this influence is at the core of all action research, in particular during the preliminary diagnosis, but also during the discussion moderation. As stated previously, doing research on strategists presupposes doing research with strategists and, thus, basing the research on the mutual influence between the researchers and the strategists. This conclusion leads us to clarify the important role of the established "discussion culture" and rules and routines during the strategic episode. The external facilitators did not try to erase them and replace them with a Habermasian "toolkit" for communication. The interactions between researchers and stakeholders permitted the reorientation of existing communication practices and skills toward a "genuine discussion". The next question researchers and practitioners may face is the following: to what extent and how could internal managers play the roles the external facilitators played to initiate and manage sustainable strategic discussions?

Phases	Facilitators micro-practices	Stakeholder micro-practices
<b>Initiation</b>	<ul style="list-style-type: none"> <li>• Preliminary diagnosis</li> <li>• Discussion-space design</li> </ul>	<ul style="list-style-type: none"> <li>• Top managers legitimization of episode</li> </ul>
<b>Conduct</b>	<ul style="list-style-type: none"> <li>• Publication of opinions via mirror effect</li> <li>• Discussion moderation: encouraging participation, creating appropriate atmosphere, mitigating...</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement in a discussion by sharing arguments that are founded and open to criticism</li> <li>• Publication/justification/ conciliation sequences</li> <li>• The consensus reached allows the discussion to be temporarily brought to a close and moved on to another topic</li> </ul>
<b>Ratification</b>	<ul style="list-style-type: none"> <li>• Invitation to ratify the new agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Validation and ratification of the significance of the episode and follow-up to be provided</li> </ul>

Table 2 - Actor micro-practices by discussion phases

The table shows the specificities of the micro practices depending on the phases of the discussion during a strategic episode. It also suggest the mutual influence of the facilitator and the stakeholders micro-practices : on the one hand, the facilitators “empower” the stakeholders through the design of the discussion space and the initial diagnosis that legitimizes the stakeholders to speak up about their opinions; on the other hand the stakeholders “empower” the facilitators giving them the legitimacy to be there and to develop the performative power of the initial diagnosis that produces concrete effects throughout the initiation, the conduct and the ratification phases.

Finally, the aim in this paper is to further our understanding of the conduct phase of a strategic episode. We argue that a more in-depth study of the conduct phase presupposes a shift from a systemic perspective (Luhmann, 1995) largely used in the existing literature (Hendry & Seidl) to a more communicational one (Habermas). The Habermasian perspective enables the elaboration of a model of communicational dynamics that unfolds during the episode. Our model highlights the managerial stakes involved in the conduct phase which the Hendry and Seidl perspective tends to subsume with the notion of communication auto-organization. More generally, this paper addresses the question of opening, designing and monitoring a “public sphere” in an organization, in order to enhance the strategic reflexivity of managers. It calls for more research in that direction.

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**Mathieu Detchessahar** is Professor at IAE Nantes School of Management, Nantes University. His research themes include dialog in organizations, health at work and managerial innovations. More broadly, he works on the relationships between management, organization and society.

**Benoît Journé** is Professor of Management at the University of Nantes (IAE Nantes School of Management) and researcher at LEMNA. He is head of the RESOH Chair at IMT-Atlantique. He works on high reliability organisations and human & organizational factors of industrial safety. He is particularly interested in organizational practices, processes and tools.

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