Towards a video-based analysis of conversation in strategy workshops

Abstract

This paper explores video data of strategy workshops using scenario planning in a major organisation in the transport sector. The strategy literature contains calls for greater access to the strategising process and to conversations about strategy between senior managers. There is also a need for further research into how strategy tools such as scenario planning are used. In this paper the authors describe the use of conversation analysis and video analysis to explore key fragments of discourse, to reveal how strategic recommendations emerge. Further research into the use of conversation analysis and video analysis to study strategy workshops is called for.

Introduction: Strategy Workshops
Strategy workshops are a common practice in organisational life today
(Hodgkinson et al, 2006). Schwarz (2009) describes strategy workshops as
providing a forum for strategic discourse facilitated through knowledge-
sharing and/or promotion of strategic consensus. Many aspects of strategy
workshops are discussed in the management literature. For instance, the use
of a range of mapping techniques is illustrated (Wallemacq and Jacques,
2009; Eden and Ackermann, 1998; Bougon, 1992), and questions around the
facilitation of such workshops are demonstrated and debated (Salo et al,
2009; Stewart, 2006). Reasons for the apparent success or failure of such
workshops are also addressed. For example, Schwarz points out that a
strategy workshop may constrain strategy making, through 'opposition and
refusal to participate, which may lead to strategic paralysis with no outcomes,
actions or recommendations' (Schwarz, 2009, p 284).

A study by Hodgkinson et al (2006) suggests that strategy workshops play an
important part in formal strategic planning processes; that they rely on
discursive rather than analytical approaches to strategy formation; and that
they typically do not include middle managers, rather reinforcing elitist
approaches to strategy development. Their conclusion is that strategy
workshops are important vehicles for the emergence of strategy, but that
surprisingly little is know about many aspects, such as the role played by
analytical tools and techniques during strategy workshops.

In this paper, we analyse a strategy workshop at a large organisation in the
transport sector in the UK. Via video and conversation analysis, we explore
how the participants engaged in a conversation about the future strategy of
the organisation. Via our unusual access to the strategising process and the
used of video and audio recording, we reflect upon the emergence of strategic
recommendations over the course of the workshops. We consider the value
of video-based data and analysis in the context of managerial discourse about
strategy, and we set out an agenda for further video-based research in similar
organisational contexts.

**Using conversation analysis and video analysis to explore strategic
discourse**
Our study explores the conversations held by senior managers during
strategy workshops. During such workshops, we see that managers use
language to develop their ideas about possible future strategies for the
organisation, and to build arguments that they believe will persuade others.
All of this is done collaboratively, while interacting with colleagues, and
accepting or rejecting the verbal contributions that are made by others.
Wallemacq and Jacques (2009) view language as "a kind of surrounding
environment, a world in which we move rather than something a speaker
creates on his or her own" (p 31). Robichaud et al (2004) suggest that the
primary function of language is to 'support collaborative activity, typically
associated with some common field of practice' (2004, p. 619). They use the
term *metaconversation* to indicate 'a conversation that embeds, recursively,
another conversation' (2004, p. 621). This draws upon Weick's (1995) notion

of retrospective sensemaking; in other words that "people can know what they are doing only after they have done it" (1995, p 24).

In order to explore the data we have gathered, we draw upon conversation analysis. O'Sullivan (2010, p. 21) proposes that conversation analysis (CA) 'allows researchers to understand conversations … as sequences of actions that participants perform to create and manage meaning between themselves. In particular, CA focuses on how participants in a conversation anticipate and qualify each other's semiotic opportunities'. Conversation analysis has been used to analyse many aspects of management team meetings. For example, Nielsen (2009) explored the strategies adopted by middle managers to exercise leadership in their interactions with employees during business meetings. Markman's (2009) study of virtual meetings using conversation analysis provides evidence of the difficulties that participants in such computer-mediated communication appear to experience when talk is not so tightly coupled with embodied action. The medium referred to as "quasisynchronous chat" presents problems for participants, in that it 'disrupts the temporal flow of conversation' (Markman, 2009, p 150), and makes the opening and closing of such meetings more difficult and time-consuming. This gives an indication of the importance of studying the embodied action that normally accompanies talk (e.g. in face-to-face meetings), and video data (alongside audio data) can provide researchers with an opportunity to do this. In this paper, the authors begin to make links between the audio and video data gathered, to understand the strategic conversation that is taking place *in the context of* the embodied action that is an important part of a strategy workshop.

Methodology: Undertaking video analysis of strategy workshops
In this study, the authors drew upon the work of vom Lehn, who points out (2010, p.35) that unlike other forms of data, audio-visual recordings afford the researcher 'the opportunity to share, present and discuss the evidence which supports observations and analysis, a facility that is rare within the social sciences'. Strong interrelationships exist between action and context; conversation analysis has revealed the social and sequential organisation of talk (Garfinkel, 1967; Sacks, 1992; Heritage, 1984). Vom Lehn (2010) argues that the situated character of practical action (such as talk, visual and bodily conduct) can be elaborated by audio-visual data which helps us to understand how participants produce and make sense of particular actions.

Following vom Lehn (2010), the authors began the process of data collection with a review, in which we examined the video data to assess the quality of the images and sound and to identify any issues that might be relevant to further data collection. A preliminary analysis was then undertaken of a selected number of fragments, which led the authors to begin to reflect upon particular actions and activities that informed further data gathering. Heath et al (2010) advocate a similar approach, where the principal data of a video-based study – the recordings - are reviewed a number of times. They suggest that there are likely to be at least three reviews of the data (Heath et al, 2010, p 62) – a preliminary review (including cataloguing the data corpus), a substantive review (e.g. to find further instances of potentially interesting

events or fragments), and an analytic review (e.g. gathering, scrutinising and comparing key fragments of data). Our analysis therefore proceeded case by case, with the authors subjecting particular actions to a highly detailed scrutiny and to examine the immediate context and a particular interactional environment in which they arise.

Von Lehm also notes that while in conversation analysis there is a long-standing convention for the transcription of talk, a similar convention is not available for the transcription of people's visual and material conduct, such as handling an object (2010, p36/7). However, von Lehm adopts the approach of transcribing, at least the onset and completion, of the visual and material features of the participants' conduct with regard to the talk and/or silence or pauses (Goodwin, 1981; Heath, 1986). A transcript of the conversation can be supplemented by a transcript containing photographs of the interaction that is being studied (von Lehm, 2010, p 37/8). The authors are working towards these goals as their project progresses.

Examples of data analysis and results
The two short transcripts below are fragments from a one-day strategy workshop, in which the five participants – all senior managers at a large organisation in the transport sector – are tasked with assessing the impact of two possible future scenarios on the strategy of their organisation, and recommending a revised strategy. One of the authors observed the entire workshop, and both authors were present for the final presentation at the end of the workshop, where the group presented their recommendations for a new strategy. The authors identified and analysed the key themes that underpinned the strategic recommendations in the final presentation, and traced those key themes back through the workshop by searching for key words and phrases. The two fragments presented below have been chosen to illustrate how one of those key themes, that of stakeholders and how they should be managed, first entered the strategic conversation of the five participants. Transcript notations (based on Heath et al, 2010) are shown in Appendix 1.

The first fragment begins as they review the organisation's existing vision statement, and comment on its potential shortcomings. There has also been a change of facilitator, with one participant (Charles) reluctantly taking his seat and handing over to another (Alan), who is now standing at the flipchart and making notes on their discussion of the vision.

Fragment 1

David: There's one key word missing which is *stakeholders*, and customer satisfaction -
Mark: Alan, can you tell us what you're trying to achieve? (0.5)
Alan: What I'm trying to do now is to put some meat on the vision (.) so that when we do the strategy we have much better linkages back into (1.0) ((waves left hand in direction of flipchart)) where we're trying to be (0.7)
Mark: Ok, great -

> David: So when we're talking about stakeholders we can link it straight back into passengers and stakeholders, (0.3) when we talk about technology we might talk about reliability and sustainability -
>
> Mark: So is it fair to say that by doing this we're getting our shared head space in this room of what the vision is (.) of what our understanding of it is? (1.0) ((Alan nods his head))
>
> John: I think that's where Charles was trying to get us to as well (0.7)
>
> David: Yes and I agree we need to do that. For me (.) when we read what we started with and we read this, there's only one word missing and that's *stakeholder* (.) so I don't think we need to write the whole detail, cos we're taking time here

Around three minutes later, as the participants try to reach closure on their understanding of the existing organisational vision, the conversation once again returns to the issue of stakeholders and their management – see Fragment 2 below.

> **Fragment 2**
>
> Alan: Is that *it* do you think? Are those the key issues? (2.0)
> That's the high level strapline, isn't it (1.0) ((underlining words on the flipchart with pen)) We've included passengers, we've got to work stakeholders in here=
>
> Mark: Yeah, I think we need to be a bit more specific on stakeholders (0.5)
> Commitment, cooperation, they're a bit kind of cliché terms, aren't they -
>
> David: There is one other aspect beneath that which is this bit about our staff, inspiring, exciting, enabling -
>
> Mark: Just before we get that, can we bottom out the stakeholder bit (…)
>
> John: It's about trust

The two fragments above enable us to see the key contributions of one individual – in this instance, David – in raising the issue of stakeholders, and arguing that the group needed to concern itself with this issue. Other key themes can be explored in a similar way. For example, the second fragment ends with one participant, John, introducing the question of trust; this leads to a discussion of the idea of stakeholder confidence, and possible new funding streams, which had not previously been considered by the group. This is particularly interesting as further analysis shows that John makes relatively few contributions throughout the day; however, his comments at the end of the second fragment are influential in starting a new line of discussion.

Used alongside video analysis, the approach adopted above also allows us to explore the contributions of individuals and the group dynamics in strategy workshops. For example, we can see that one participant, Charles, does not make any verbal contributions during the two fragments above; yet further analysis shows that he makes a large number of contributions over the day as a whole. His silence during the above fragments may be influenced by the

incident that took place just before Fragment 1, when the group took the view that the role of facilitator should be shared over the day, and that Charles should hand over to another participant at that point. In addition, the approach demonstrates the role that artefacts, created by participants during the workshop, play both in the discussion and in the subsequent presentation – in this instance the flipchart is used to record and highlight key elements of the discussion.

Conclusions: Analysing conversation about strategy
Barry and Elmes (1997, p. 430) propose that 'strategy must rank as one of the most prominent, influential and costly stories told in organizations', and suggest that researchers should explore 'how language is used to construct meaning [and the] ways in with organizational stakeholders create a discourse of direction'. Samra-Fredericks (2004) points out that this research agenda is hampered by a number of issues. One of the most pressing is 'getting access to strategising processes *happening then-and-there* over time and space'. She also identifies 'the need to adopt a specific methodological approach to such 'happenings' since talk is the focal analytical point of interest'; and she observes that conversation analysis is one such approach. The authors support this view, and its value is illustrated by the analysis above.

Samra-Fredericks (2003, p 148) also discusses the 'apparently insurmountable practical problem which arises from extended periods of fieldwork'. In particular, she wonders – in relation to her (2003) study of strategy in a manufacturing company - 'how much of the ethnographic description and the corpus of transcripts allied with the fine grained analysis can be reproduced in one paper' (2003, p 148). Arguing that 'within the conversation analytic field … it is accepted that whole chapters/articles may be devoted to discussing just one brief exchange' (2003, p 148), she deals with her practical problem by focusing her (2003) paper on the reproduction of four transcribed strips of interaction, with the discussion having a clear focus on a set of key issues that she identifies. The authors have adopted a similar approach in the preliminary analysis reported here. Having identified stakeholders and their management as a key theme in the concluding presentation of the strategy workshop, we have shown how this issue emerged into the strategic conversation, during a critique of the existing organisational vision. Our work suggests that video analysis is a powerful tool in supporting the analysis of many aspects of strategy workshops, such as the physical arrangement, body language and movement of the participants, and their use of artefacts such as flipcharts and post-it notes when using strategy tools such as scenario planning. The use of audio and video recording allowed the two researchers to review the data after the event, to code it separately before reflecting on it together, and to share data with other researchers as evidence of what was observed. We advocate further research drawing upon video analysis alongside conversation analysis. The research agenda should include a greater understanding of how strategies emerge from conversations between senior managers, and the use of strategy tools such as scenario planning to support strategic conversations.

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Appendix 1: Transcription Notations

SYMBOL	EXPLANATION	MEANING
(.)	Period in brackets	Micropause, less than 0.2 seconds
(0.7)	Number in brackets	Pause, measured in seconds
?	Question mark	Rising intonation
.	Period (or full-stop)	Fall in tone
,	Comma	Continuing intonation
!	Exclamation mark	Animated tone
-	Single dash	Used when an utterance is cut off
()	Single parentheses	Used when there is transcription doubt, i.e. the utterance is unclear
(())	Double parentheses	Used to enclose a description of something that is hard to transcribe, e.g. ((cough)) or ((nod))
=	Equals signs	Used when adjacent utterances are 'latched', i.e. there is no interval between them
italics	Word in italics	Stressed word