

# The Importance of Meetings

How the structure of meetings  
affects strategic change in organisations



Written by:

**Paula Jarzabkowski**, AIM Ghoshal Fellow, Advanced Institute of Management Research and Aston Business School, Aston University

**David Seidl**, Institute of Business Policy and Strategic Management, University of Munich

The Advanced Institute of Management Research (AIM) develops UK-based world-class management research. AIM seeks to identify ways to enhance the competitiveness of the UK economy and its infrastructure through research into management and organisational performance in both the private and public sectors.

Written by:

**Paula Jarzabkowski**, AIM Ghoshal Fellow, Advanced Institute of Management Research and Aston Business School, Aston University

**David Seidl**, Institute of Business Policy and Strategic Management, University of Munich

### AIM consists of:

- Over 200 AIM Fellows and Scholars – all leading academics in their fields...
- Working in cooperation with leading international academics and specialists as well as UK policymakers and business leaders...
- Undertaking a wide range of collaborative research projects on management...
- Disseminating ideas and shared learning through publications, reports, workshops and events...
- Fostering new ways of working more effectively with managers and policymakers...
- To enhance UK competitiveness and productivity.

### AIM's Objectives

**Our mission is to significantly increase the contribution of and future capacity for world class UK management research.**

Our more specific objectives are to:

- Conduct research that will identify actions to enhance the UK's international competitiveness
- Raise the quality and international standing of UK research on management
- Expand the size and capacity of the active UK research base on management
- Engage with practitioners and other users of research within and beyond the UK as co-producers of knowledge about management

## contents

AIM – the UK's research initiative on management	2
About AIM	3
AIM research themes	4
Executive review	5
Introduction: the importance of meetings	7
Meetings: defining terms	8
Characteristics of strategy meetings	10
A framework for strategy meetings	20
Conclusions	25

### **Current AIM research projects focus on:**

#### **UK productivity and performance for the 21st century.**

*How can UK policymakers evaluate and address concerns surrounding the UK's performance in relation to other countries?*

National productivity has been the concern of economists, government policymakers, and corporate decision-makers for some time. Further research by scholars from a range of disciplines is bringing new voices to the debates about how the productivity gap can be measured, and what the UK can do to improve the effectiveness of UK industry and its supporting public services.

#### **Sustaining innovation to achieve competitive advantage and high quality public services.**

*How can UK managers capture the benefits of innovation while meeting other demands of a competitive and social environment?*

Innovation is a key source of competitive advantage and public value through new strategies, products, services and organisational processes. The UK has outstanding exemplars of innovative private and public sector organisations and is investing significantly in its science and skills base to underpin future innovative capacity.



#### **Adapting promising practices to enhance performance across varied organisational contexts.**

*How can UK managers disseminate their experience whilst learning from others?*

Improved management practices are identified as important for enhancing productivity and performance. The main focus is on how evidence behind good or promising practices can be systematically assessed, creatively adapted, successfully implemented and knowledge diffused to other organisations that will benefit.

Meetings, an understudied aspect of organisational life, play a key role in the formulation of strategy and strategic change within organisations. More importantly, the likelihood of proposals for strategic change being made, and how those proposals are received in the wider organisation, depends on the type of strategy meeting, and how it is conducted.

This briefing provides a framework for understanding the different types of strategy meeting and the effects that they have on strategic change in organisations.

How favourable an environment a meeting is for bringing about strategic change depends, in part, on how effectively it suspends the everyday social structures and hierarchies in the organisation. Setting aside these structures allows people to contribute more freely to the discussion, and make suggestions which depart from existing strategy.

Meetings can be open – not restricted to senior management, and incorporating a wide range of participants (widely viewed as a more democratic forum) – or closed – restricted to senior management.

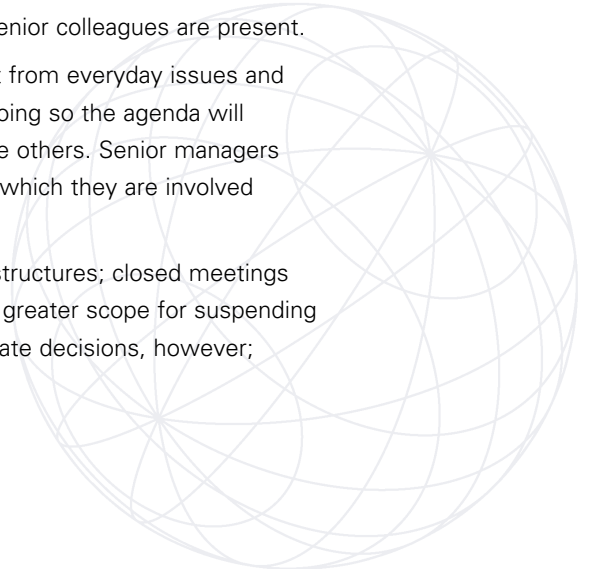
### 1 The components of meetings

There are three key components of meetings: initiation – the point at which the meeting is detached from ongoing organisational processes; conduct – how the meeting is conducted; and termination – when participants rejoin normal organisational activities and the point at which a proposed change to strategy is incorporated into the organisation.

#### (i) Initiation: How the meeting suspends everyday organisational social and hierarchical structures

- A new physical and social context is established by taking people out of their usual work environment, and detaching them from everyday departmental activity. Senior managers may have an advantage if the meeting is in a location that they are familiar with.
- The meeting brings some people together, who do not normally interact, while excluding others; partisan departmental issues must be left behind. Senior managers may have an advantage if many of their senior colleagues are present.
- Setting and chairing the agenda, signals detachment from everyday issues and focuses on organisation-wide (strategic) issues. In doing so the agenda will designate some issues for consideration and exclude others. Senior managers may have an advantage depending on the extent to which they are involved in setting and chairing the agenda.
- Open meetings tend to reinforce existing authority structures; closed meetings are attended by top managers and, potentially, offer greater scope for suspending established structures; closed meetings do not validate decisions, however; hence they need to link to open meetings.

Meetings, an understudied aspect of organisational life, play a key role in the formulation of strategy and strategic change within organisations.



## (ii) Conduct of the meeting and its effect on proposals for strategic change

- **Free discussion:** Anybody who wants to contribute does so whenever they feel like it. In this format there is a high chance of proposals for change being discussed.
- **Restricted free discussion:** The Chair restricts the scope of discussion – through statements about the value of the contributions of others, for example. This tends to suppress change.
- **Restricted discussion/turn-taking:** Formal turn-taking of contributions suppresses the opportunity to reflect on issues and reduces the chances of proposals for change.

## (iii) Termination: How the meeting ends and its impact on proposals for strategic change

- **Placing an item in the minutes:** Putting proposed changes in the minutes symbolises that they are taken care of, preventing them from spilling over into the wider organisation; proposed changes reported in the minutes as failed are 'killed off' as legitimate issues.
- **Working groups:** These provide bridges for proposed changes from one meeting to another, thus keeping changes alive.
- **Rescheduling:** This also provides a bridge for proposed changes from one meeting to another, keeping changes alive.
- **Voting:** Voting tends to reaffirm existing strategy as proposed changes are mostly voted against, or if voted for, commitment is very low.
- **Stage-managing:** Preparing the organisation for the proposed changes increases the chances of that change being accepted.

## 2 Meeting type and effect on strategy

It is possible, therefore, to see how different types of meeting make it more or less likely to engender strategic change, and to structure meetings accordingly, depending on the desired outcome.

- **Closed:** Sets aside the social structures of the organisation and encourages the proposal of changes. However, the closed nature of the meeting means that, for changes to be adopted, they need to be taken forward on the agenda of an open meeting.
- **Open during free discussion:** Organisational structures and hierarchies are largely suspended allowing changes to be proposed. To ensure the adoption of changes, links to further meetings and working groups should be established.
- **Open with restricted free discussion:** This meeting format does not favour the proposal of changes in strategy. Instead, changes are likely to be either abandoned without further development or moved to a final forum where they are accepted or abandoned.
- **Open during restricted discussion:** Proposed changes are introduced to the organisation. Whether they are accepted or not is influenced by how the meeting is brought to a close. Voting tends to result in proposed change being abandoned. Stage-managing reception of the idea tends to tip the balance towards changes being accepted.

## introduction: the importance of meetings

Despite their pervasiveness in organisational life, meetings have not received much attention from management researchers. This is particularly surprising, as meetings are such a key feature of the strategy process, both as part of the annual strategic planning cycle, and at times when critical strategic incidents arise. Meetings can be viewed as focal points for the strategic activities of the people within the organisation, during which the organisation stabilises strategy into recurrent patterns, reinforcing the existing strategy, and also evolves strategy during times of crisis or change.

This briefing looks at the relationship between meetings and the shaping of an organisation's strategy over time. In particular, it examines how meetings are involved in either stabilising and reconfirming existing strategy, or contributing to changes in strategic direction over time.

In doing so we provide an analysis of the specific structure and conduct of strategy meetings, and consider how different types of structure and conduct shape the evolution of changes to existing strategy.



Meetings can be viewed as focal points for the strategic activities of the people within the organisation...

Meetings are taken for granted in modern life. As a result the significance of meetings has tended to be overlooked by researchers.

In the classical research literature on organisations the meeting is usually seen as a tool for accomplishing specific tasks, particularly for making decisions; albeit not a very effective tool. More recently, however, social scientists have started to study the role of meetings as routine social practices that stabilise the greater social system to which they belong; that of the organisation of which they are part.

### 1 Some definitions

The literature provides various definitions for meetings. A meeting is defined as a planned gathering of three or more people who assemble for a purpose that is ostensibly related to some aspect of organisational or group function.<sup>1</sup>

Meetings are distinct from casual encounters; they have an organisational purpose, involve multi-party talk and are considered episodic because they include some people and issues during a particular space and time, whilst excluding others.<sup>2</sup> Within these common characteristics, meetings may have varying classifications. For example, a common distinction arises between formal and informal meetings.<sup>3</sup>

It is also possible to make a distinction between scheduled and unscheduled meetings. Unscheduled meetings typically do not occur at specific times, their degree of formality is low and the meeting is not formally responsible to any other group. Scheduled meetings, in contrast, typically take place at set times, are comparatively formal and are either formally responsible to another group or a principal. A distinction may also be made between decision, task and information-oriented meetings.<sup>4</sup>

Our paper examines the specific characteristics of strategy meetings, the various forms they take, their sequential relationships and what implications these characteristics, forms and sequences have in shaping organisational strategy.

### 2 Meetings and strategic change

A meeting is a sequence of events marked by a beginning and an ending. By the nature of their beginning and ending, meetings are thus related to, but also stand apart from, the wider flow of organisational activity.

Because meetings are separate from ongoing organisational activity, they allow organisational members to step out of, and reflect on, the established social and communicative structures of daily work. This 'stepping out of the ongoing management process' and 'switching of contexts' is a necessary precondition for the initiation of strategic change. As the daily flow of organisational life involves largely stable patterns of activity, strategy meetings make it possible for actors to distance themselves from and reflect on the status quo – the stable patterns of activity – and, on the basis of these reflections, to either reinforce or to change them. In this way strategic change, but also strategic entrenchment, are *actively* created during meetings.

A meeting invariably has a clearly defined beginning and ending which guide the communications taking place. Participants communicate differently when they know that there is a time limit. Meetings serve as a *temporary suspension* of some of the existing organisational elements that stabilise strategy. At the beginning of the meeting, some elements are suspended which are then reinstated at the end of the meeting. Even where elements of strategy are either confirmed or changed *within* the meeting, this must be fed into the wider organisation.

The effect of a meeting, therefore, depends on how receptive the wider organisation is to the outcomes of the meeting. It provides the organisation with 'proposals' for strategic change which might be accepted, depending on the how receptive the organisation is, and how those proposals are introduced.

### 3 The three components of meetings

There are three critical elements of a meeting: initiation; conduct; and termination.

- **Initiation** is the point at which the strategy meeting is 'de-coupled' from the ongoing organisational processes and at which new structures for the activities within the meeting, separate from the normal organisational structures, are established.
- **Conduct** is concerned with the activities within the meeting. How the meeting is conducted is crucially important in determining the results that can be achieved. It is only possible to reflect on the established strategy with any effect, if the conduct of the meeting enables people to distance themselves from the wider organisation and its strategic orientation. In many cases, however, the conduct of a meeting may lead to the confirmation of existing strategy, which is also important because it stabilises strategy by reinforcing the status quo.
- **Termination** of the meeting is the point at which the usual organisational order is reinstated. At the meeting closes, members go back to their daily activities. If the meeting is to have any effect on the wider organisation, at this stage any proposed changes to existing strategy, however small, must be incorporated into the organisation. Termination, however, also protects the organisation from potentially disruptive effects by filtering what comes out of the meeting into the wider organisational processes.

### 4 Open or closed?

Meetings can be open or closed. Closed meetings are meetings where just the senior team is present. Open meetings include a broader range of participants, although this may include members of the senior team.

# characteristics of strategy meetings

In order to understand how meetings impact on organisational strategy managers must first understand the three critical elements of meetings – initiation, conduct and termination – in more detail.

## 1 Initiation

### (i) Removal from usual work environment

Establishing the meeting enables people to set the organisation's hierarchies and social structures to one side for a moment...

The initiation of a meeting always involves some detachment from the flow of everyday activity, establishing a space and time in which some organisational structures may be temporarily suspended. This is because a meeting disrupts participants from their day-to-day departmental roles, and provides them with a reason to gather together away from the various functions in the organisation in which they work.

Strategy meetings are typically conducted in a central location, which reinforces the removal from everyday activities as most participants are physically remote from their departments. Establishing the meeting enables people to set the organisation's hierarchies and social structures to one side for a moment, and to focus on the meeting rather than their day-to-day work and routines.

At the same time, however, some existing organisational hierarchies are reinforced because a central location, such as the boardroom, is often familiar to senior managers, while unfamiliar to others in the meeting.

### (ii) Interacting with unfamiliar people

The initiation of a meeting brings together some people and excludes others. Participants are brought together with other people from outside their usual team or working environment for the purpose of focusing upon the particular topics of the meeting.

The contributions of interested parties may be formally controlled, with members of a particular department expected to either leave a meeting or abstain from discussion during consideration of issues that relate to that department.

Social control may also be evident, "Those individuals who are peddling their own barrow, from the point of view of self interest, very quickly get sidelined and lose any influence they have in that particular debate or even generally. And that's noted by everybody. In other words they've just taken themselves out of the scene; they are doing the exact reverse of what they had hoped to be doing," said one participant.

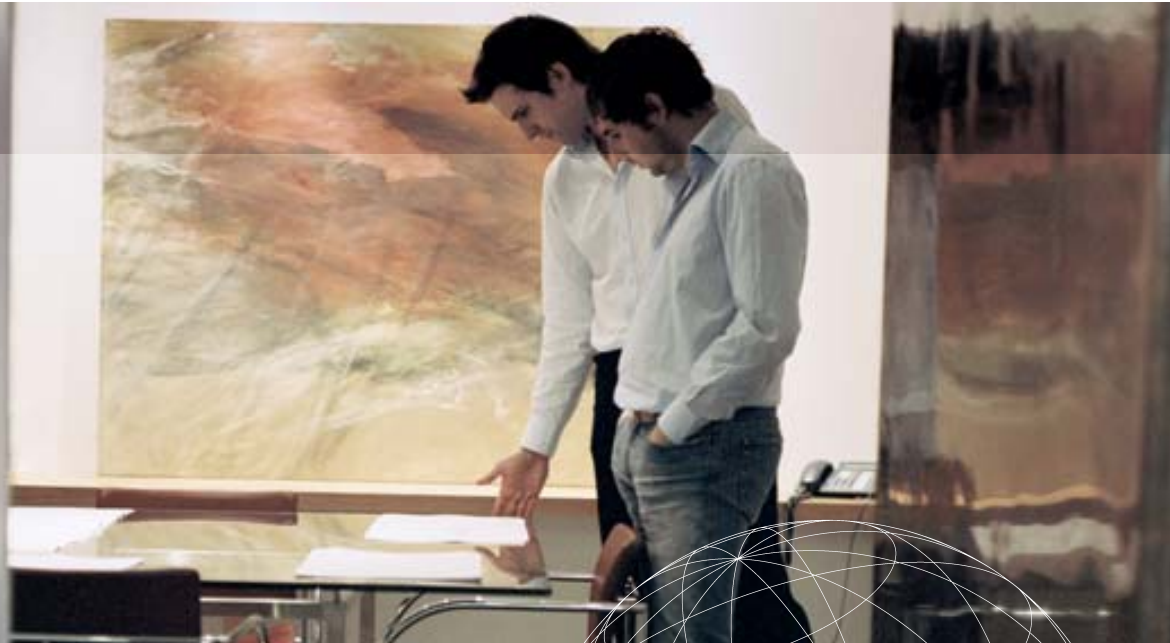
At the same time, while for most participants a meeting may mean interacting with unfamiliar people, and thus suspending organisational hierarchies, with top managers there are often a number of members of the top management team at a meeting, who know each other.

### **(iii) Setting and chairing the agenda – open meetings**

Initiation establishes the new structures that will govern the meeting. The formal agenda demarcates the beginning of the meeting and structures its conduct. While an agenda establishes the focus of the meeting, its purpose differs depending on whether the meeting is open or closed, as a result it may indicate more or less suspension of organisational structure.

In the organisations studied, with open meetings, agendas were formally prepared in consultation with a top team member and sent out some two weeks in advance. The agenda gives the Chair considerable control over the structure and content of the meeting.

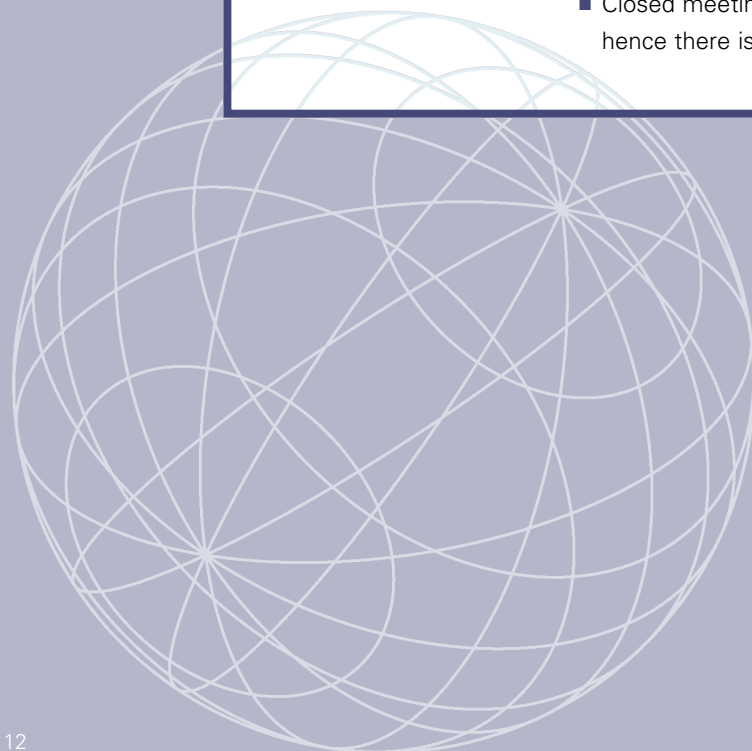
Typically, the Chair opens meetings, setting the scene and opening the first item on the agenda. Items that required a decision, or where discussion was expected, did not appear as the first or second item on the agenda, but were delayed until the meeting was fully under way. This meant the Chair could establish authority over the meeting structure and conduct before the introduction of issues that were, potentially, destabilising.



Thus, the agenda in open meetings only partially suspends organisational structures; participants stop their daily organisational activities but maintain their role in the organisational hierarchy. The authority accorded to the Chair by the establishment and use of the agenda, allows the Chair to shape how that meeting may attempt to stabilise or destabilise strategy.

**Table 1: Characteristics of meeting initiation**

<b>Characteristic</b>	<b>Effect on suspending everyday organisational structures</b>
Taking people out of their usual work environment	<ul style="list-style-type: none"> <li>■ Signals detachment from everyday departmental activity</li> <li>■ New physical and social context is established</li> <li>■ Favours top managers</li> </ul>
Interacting with unfamiliar people	<ul style="list-style-type: none"> <li>■ Brings some people together, who do not normally interact while excluding others</li> <li>■ 'Partisan' departmental issues must be left behind</li> <li>■ Favours top managers</li> </ul>
Setting and chairing the agenda	<ul style="list-style-type: none"> <li>■ Signals detachment from everyday issues and focuses on organisation-wide (strategic) issues</li> <li>■ Designates some issues for consideration and excludes others</li> <li>■ Privileges top managers both in setting and chairing the agenda</li> </ul>
Establishing 'closed' or 'open' meeting	<ul style="list-style-type: none"> <li>■ Due to 'public' display open meetings tend to reinforce existing authority structures</li> <li>■ Closed meetings are attended by top managers and have the potential for greater suspension of the established structures</li> <li>■ Closed meetings do not validate decisions; hence there is an implicit link to open meetings</li> </ul>



### **(iii) Closed meetings**

Closed meetings had the same general characteristics of initiation but with less formality. Their agenda was typically shorter, less formal and developed only a day or two before the meeting, or even on the same morning. While the initiation still involved the Chair opening the meeting, it tended to be less structured, sometimes even asking the meeting participants about the key issues that needed discussing.

Agenda-driven control of the meeting was less important in closed meetings because the participants were typically from the top team inner circle and so less in need of advance preparation. As a cohort of elites engaged in strategy-making, typically these meetings were for the purpose of frank strategic discussion between top managers, particularly on contentious issues, as indicated by the expression that such meetings were places 'to get blood on the carpet'.

Second, these closed meetings were never formal decision-making bodies for the organisation. They were discussion fora for the top team that were implicitly linked to other meetings, as top managers needed to validate any issues from the closed meeting in more open meetings.

These features of closed meetings enable greater suspension of organisational structures because top managers do not have to take account of other organisational members in their interaction. However, because they are not decision-making bodies, any changes to the organisations existing strategy that they propose will have to be built into the organisation through links to other meetings.

## **2 Conduct**

The meetings in this study were all chaired by a top team member, who exerted some authority over the meeting's conduct, particularly turn-taking, in which participants must be acknowledged by the Chair in order to speak, unless the Chair specifically relaxes that authority. While the Chair cannot control the actual content of any individual participant's discussion, it does provide a set of structural and symbolic parameters around how that content may be presented.

There were three types of discussion: free discussion, restricted free discussion, and restricted discussion.

Free discussion may boost the confidence of the meeting to propose changes to existing strategies to the organisation.

### (i) Free discussion

Free discussion involves the greatest degree of suspension of the organisational structures. The Chair dispenses with turn-taking, enabling unstructured comments and responses. It is the typical mode of conduct in all closed meetings, but can also occur in open meetings. Free discussion allows participants to speak spontaneously, without seeking the acknowledgment of the Chair, and has two effects that impact on enabling reflection on existing strategic orientations: bolstering confidence and enabling the emergence of change.

**(a) Bolstering confidence:** Free discussion may boost the confidence of the meeting to propose changes to existing strategies to the organisation. It may allow participants to examine the pros and cons of an issue, reflecting on existing strategic orientations, but not constrained by them. It may allow the proposal of micro-changes to strategy, in ways that increase how receptive the organisation is to those changes. Free discussion, because it enables participants in meetings to bolster their confidence and propose such small changes and work through the issues involved in building organisational receptivity, is a vital component of destabilising strategic orientations.

**(b) Emergence of proposed changes:** Free discussion in meetings can enable significant changes to emerge and progress to the stage of considering how to increase organisational receptivity to the proposed changes, in a way which will allow those changes to be introduced into the organisation.

Free discussion is, therefore, an important means by which meetings suspend the structures of the organisation enough to allow participants to reflect upon existing strategy and propose changes that might destabilise that strategy.

In closed meetings free discussion was the dominant mode of interaction. In open meetings interaction switched between free discussion and other forms of discussion.

### (ii) Restricted free discussion

Although superficially it may appear very similar, restricted free discussion is based on different principles to free discussion.

In the meetings studied, restricted free discussion occurred in open meetings and involved opening an issue to discussion in a similar way to free discussion. However, the Chair's authority was used to shape the flow of discussion. For example, the Chair might interject value-statements that cast doubt on the speaker's proposed changes, such as, "Oh, blurring the agenda lines again".

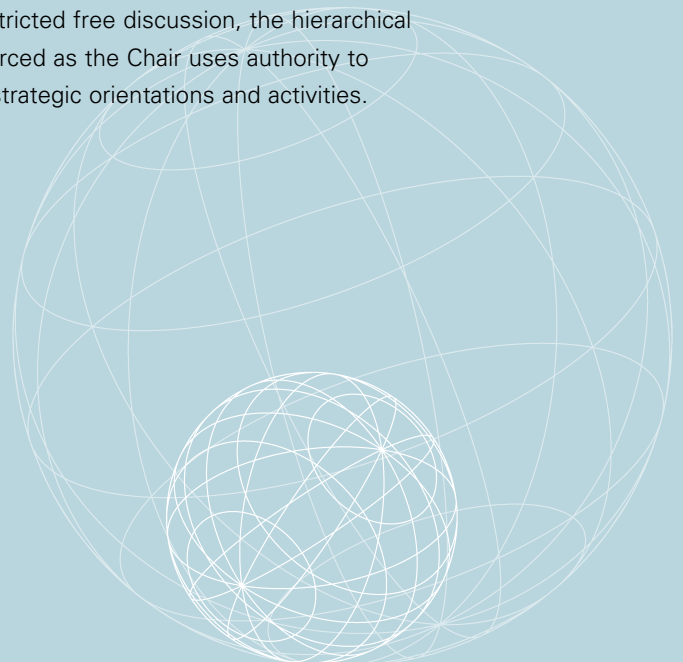
Such interjections, while not reinstating turn-taking through the Chair, reinforce organisational hierarchy and authority structures by heightening participants' awareness of the Chair's authority to rein in discussion. For example, participants exchanged grimaces with a close colleague or subsided with a reddened face when the Chair inferred a value to their comments. For these participants the discussion was restricted, while other participants were made aware that only some types of 'free' discussion content were acceptable to the Chair.

**Table 2: Characteristics of meeting conduct**

<b>Mechanisms</b>	<b>Effects on stability/change</b>
Free discussion	Greatest suspension of the existing structures; provides the chance for self-organisation; possibility for open reflection; high chance for change and discussion of changes
Restricted free discussion	Because of the authority of the Chair which represents the existing structures proposal of change mostly suppressed; tends to stabilise existing orientations
Restricted discussion/turn-taking	Strict turn-taking mode mostly suppresses any real reflection (no self-organisation possible); chances for a proposal of change are low and if put forward likely to be killed off; tends to be stabilising existing orientations

Even where interjections by the Chair could not cause meeting participants to restrict their discussion, the Chair could shape restricted free discussion towards a desired resolution of an issue.

For example, on one issue the Chair would not let ostensibly 'free' discussion settle upon the consensus emerging from the meeting participants. Thus, restricted free discussion differs from free discussion. In restricted free discussion, the hierarchical structures of the organisation are being reinforced as the Chair uses authority to restrict discussion and reinforce the existing strategic orientations and activities.



### **(iii) Restricted discussion**

Restricted discussion involves a meeting conducted under formal structures, the main mechanism of which is structured turn-taking. In structured turn-taking each member of the meeting is invited to speak in turn. Structured turn-taking only occurred in open meetings.

While restricted discussion enables every participant to have a voice it is different in character to either of the forms of discussion above. For example, in free discussion participants could respond freely to each others' points and even in restricted free discussion, responses could be made, enabling some self-organising debate to occur within the meeting. By contrast, restricted discussion inhibits the self-organising character of discussion because development of comments through response and rebuttal is not possible. After their turn to speak, individuals cannot further develop their points, while spontaneous responses are delayed because any potential respondent must wait for their turn to speak.

Thus, structured turn-taking restricts discussion, even as it enables the symbols of democracy to be asserted by giving each participant a voice. Restricted discussion involves the least suspension of organisational structures in terms of proposing changes to existing strategy. During this form of meeting, no proposed changes to existing strategy emerged.

## **3 Termination**

Finally, the meeting must be terminated and the everyday organisational structures reinstated. Termination of a meeting requires some 'resolution' of its issues, such as minutes, which enable a record of the meeting proceedings to be captured. These minutes facilitate two main characteristics of termination, depending on the degree to which an issue has been resolved within the meeting; building bridges to other meetings or re-coupling to the organisation.

### **(i) Building bridges to other meetings**

In the termination of one meeting, bridges to other meetings are built through the use of working groups and through rescheduling. These two termination mechanisms enable issues to be sustained for further discussion as both are documented in the minutes and prompt an agenda item for subsequent meetings.

**(a) Working groups:** Working groups were a feature of all meetings, typically in response to almost any change that was perceived as potentially threatening to organisational stability.

Most proposed changes to the status quo were not resolved through a single meeting. Rather, after some discussion a working group was nominated to investigate aspects of the proposal and report back in the next meeting.

This terminated discussion of the proposal during that meeting but it also ensured that it remained on the agenda for the next meeting.

Working groups prevent the existing strategy from overwhelming initial proposals of change by ensuring that a proposal resurfaces in subsequent meetings. This builds momentum through recurrent propositions of the change, each time developing more sophisticated details and information as the working group becomes aware of new tasks to address between meetings.

Working groups enable proposals of change to persist and provide opportunities for reflection to occur over several meetings. They increase the chances of organisational adoption of the proposed change both through their composition and their persistence, as meeting participants become inured to the potential threats to organisational stability, acquiescing with or even actively supporting the proposed change.

**(b) Rescheduling:** Rescheduling discussion of proposed change for a future meeting also builds bridges between meetings by delaying decision on the change, typically on the basis that more information is needed, and providing time to build momentum about a proposed change that might otherwise be abandoned.

Working groups enable proposals of change to persist and provide opportunities for reflection to occur over several meetings.



Rescheduling and working groups have common characteristics. The working group actively seeks more information as a way of building bridges between meetings while rescheduling is a more passive way of allowing that information to emerge between meetings. Both draw upon legitimate meeting structures, such as minutes, to ensure that the proposed change will be tabled as an item in future meetings, giving opportunities for ongoing reflection and increasing organisational receptivity to the change.

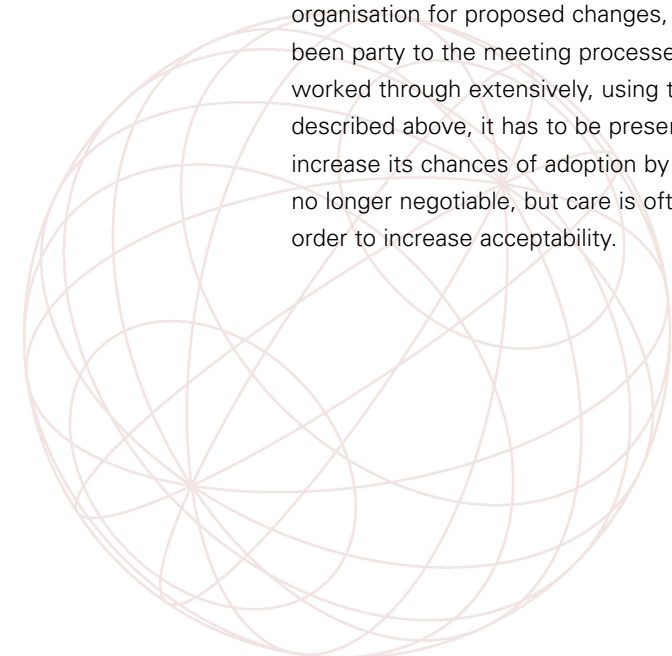
### **(ii) Re-coupling to the organisation**

Termination of a meeting also involves changes that have been resolved as far as possible within the capacity of the particular meeting. At this stage, the proposed change is re-coupled to the organisation, typically through some form of wider organisational validation. For example, proposed changes may be presented to the board, or some other large organisational gathering. These final presentations are also meetings which, because they involve a large number of organisational actors, are very open and, therefore, very bound by organisational structures, such as adherence to the agenda and restricted discussion.

Two mechanisms were used for putting a proposed change to the organisation. How receptive the organisation was to the proposed change depended on which mechanism was used: voting or 'stage-managing'.

**(a) Voting:** Voting is used when changes can no longer be sustained through working groups or rescheduling. Voting only occurred twice in the 51 meetings studied, both times on contentious proposed changes that had not been able to reach a more consensual form of resolution. In the two instances of voting observed, one was ineffective at proposing change as the vote did not support the proposal, while the other did support the proposed change but could not be actioned because it was only successful by a single vote and so lacked the necessary support. Voting thus appears to be an ineffective way of resolving matters for effecting a change in strategy.

**(b) Stage-managing:** Stage-managing highlights the importance of preparing the organisation for proposed changes, as most organisational members will have not been party to the meeting processes. Even when a proposed change has been worked through extensively, using the various conduct and bridging mechanisms described above, it has to be presented to the wider organisation in ways that increase its chances of adoption by the wider organisation. Parameters may be no longer negotiable, but care is often taken to stage manage presentation in order to increase acceptability.



The neutral tone of the wording and the evidence that a 'consultative' working group process has been used in decision-making enhances the chances of the wider organisation being receptive to a proposal; the initially contentious change is accepted as part of evolving strategic change. Considerable importance is attributed to stage-managing proposed changes at the point where they are brought back to the organisation. In all of the instances of stage-managing observed, the proposed changes were accepted with little discussion or dissent by the organisation.

**Table 3: Characteristics of meeting termination**

<b>Mechanisms</b>	<b>Effects on stability/change</b>
Placing item in minutes	Putting proposed changes in the minutes symbolises that they are taken care of, preventing them from spilling over into the wider organisation; proposed changes that are reported in the minutes as failed are 'killed off' as legitimate issues; minutes are also used as bridges for proposals from one meeting to another
Working groups	Provide bridges for proposed changes from one meeting to another; keeps changes alive
Rescheduling	Provides a bridge for proposed changes from one meeting to another; keeps changes alive
Voting	Tends to stabilise existing orientations as proposed changes are mostly voted against, or if voted for then commitment is very low
Stage-managing performance	Increases the chances of a proposed change being accepted; tends to lead to change

Termination mechanisms are central in establishing links between meetings and in bringing proposed changes to the wider organisation. As summarised in Table 3, the termination mechanisms for building bridges between meetings, such as working groups and rescheduling, enable proposed changes to be sustained across meetings, increasing the likelihood that they will be developed to the extent that they can displace existing strategic orientations.

# a framework for strategy meetings

So how do the particular features of meetings affect strategy?

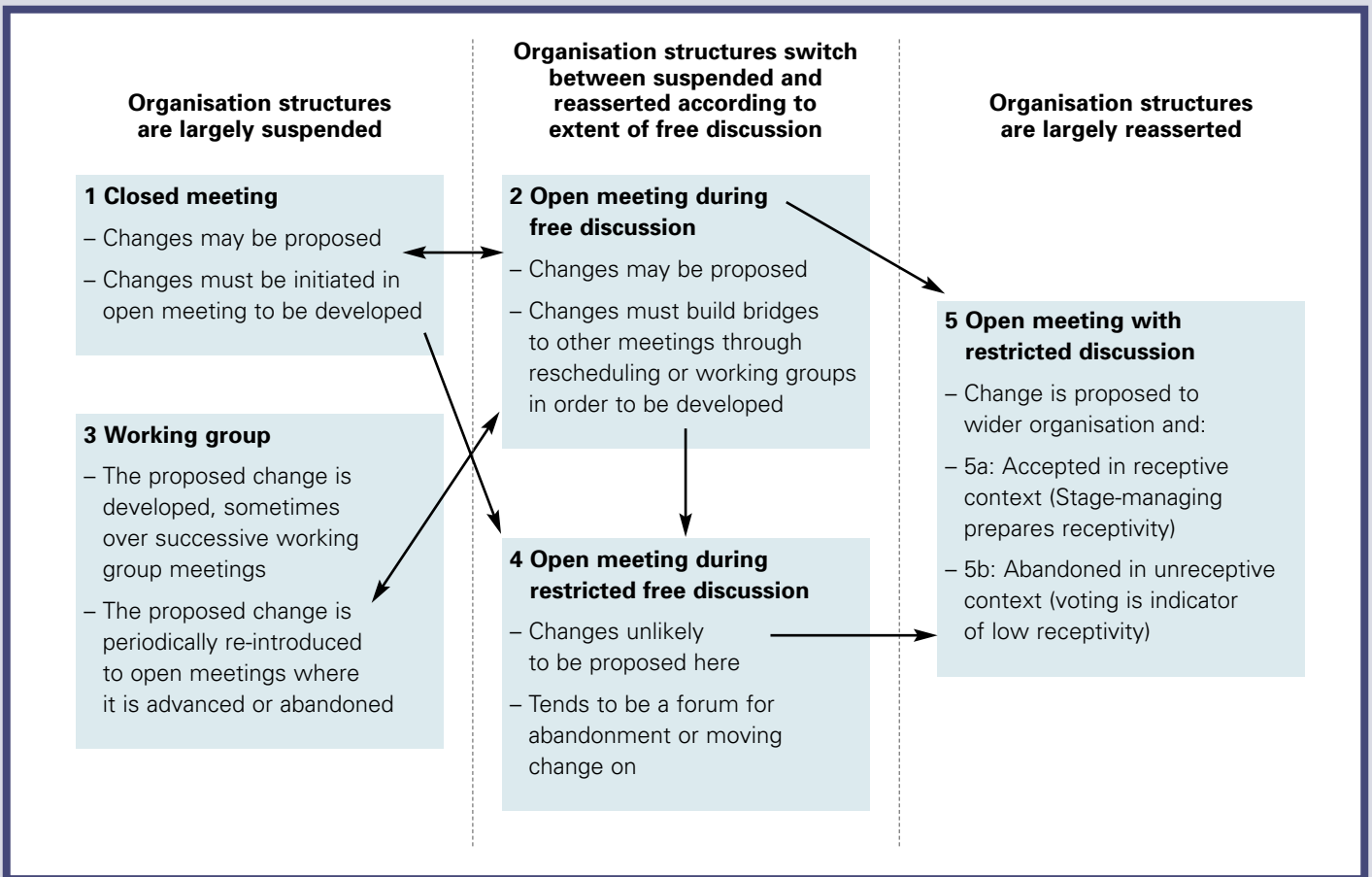
We examined all the meetings, following several issues through a sequence of meetings, and discovered a link between the suspension of organisational structures within meetings and three phases of the micro-evolutionary process of constructing changes to existing strategy.

Meeting initiation mechanisms in closed meetings... tend to suspend organisational structures...

There was an association between the *proposal* of a change, *developing* that change, and having a change *selected* – meaning it is accepted at the point of re-coupling to the organisation – or *unselected* – meaning that it is abandoned.

This led to a classification of meetings, according to the extent to which they suspend the organisation's structures, and the role they play in proposing, developing and selecting changes to existing strategy (see Figure 1 and Table 4).

Figure 1: Taxonomy of meetings



## 1 Proposal

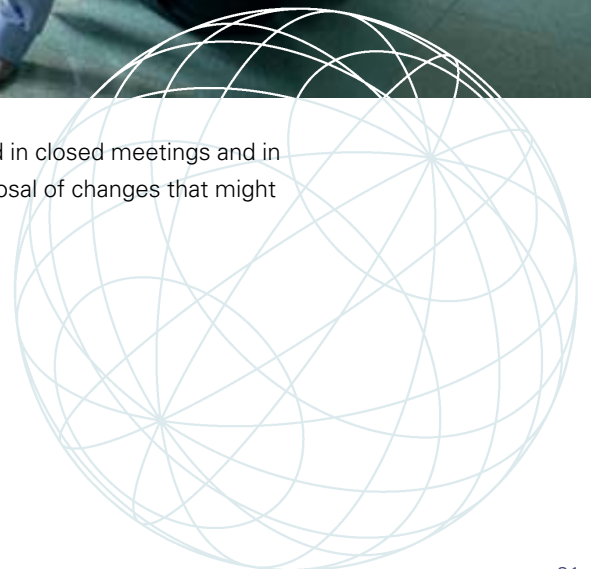
In theory, temporarily suspending organisational structures for the purposes of strategy meetings allows individuals to remove themselves sufficiently from the daily actions of the organisation so that they are able to reflect upon and propose potential changes to the status quo.

Our findings support this theory for certain meetings, with certain characteristics, notably that changes are typically proposed at: closed meetings; and at open meetings with free discussion. These have the maximum suspension of organisational structures.

Meeting initiation mechanisms in closed meetings, such as the loose agenda and relaxed authority of the Chair, tend to suspend organisational structures, so that free discussion is the dominant mode of interaction in these meetings. Similarly, open meetings with free discussion enable changes to be proposed. Because free discussion involves suspension of organisational structures, it is able to be self-organising. This self-organising nature of free discussion utilises the potential of the meeting to step outside the organisational structures, engage in discussion of potential changes, and develop confidence about proposing these changes to existing strategy.



The temporary suspension of organisational structure found in closed meetings and in open meetings during free discussion is central to the proposal of changes that might destabilise existing strategic orientations.



**Table 4: Types of meetings in proposing, developing and accepting changes**

<b>Meeting type</b>	<b>Suspension of organisational structures</b>	<b>Role in proposing, developing and selecting change to existing strategic orientations</b>
1 Closed	Organisational structures are largely suspended	<ul style="list-style-type: none"> <li>■ Changes may be proposed</li> <li>■ Bridges to other episodes must be established to develop changes:                             <ul style="list-style-type: none"> <li>– Introduce change on agenda of open meeting</li> </ul> </li> </ul>
2 Open during free discussion	Organisational structures are largely suspended	<ul style="list-style-type: none"> <li>■ Changes may be proposed</li> <li>■ Bridges to other episodes must be established to develop changes:                             <ul style="list-style-type: none"> <li>– Reschedule to other meeting</li> <li>– Establish working group</li> </ul> </li> </ul>
3 Working group	Organisational structures are largely suspended	<ul style="list-style-type: none"> <li>■ Proposed changes are developed</li> <li>■ Proposed changes are periodically re-introduced to open meetings, where they may be:                             <ul style="list-style-type: none"> <li>– Furthered in the development process by ongoing working group action or decision to propose the change to the wider organisation</li> <li>– Abandoned without further development</li> </ul> </li> </ul>
4 Open with restricted free discussion	Organisational structures are reasserted in the background of the discussion	<ul style="list-style-type: none"> <li>■ Changes are unlikely to be proposed, as the meeting format is not receptive to them</li> <li>■ Changes are likely to be either abandoned without further development or moved to a final forum for acceptance/abandonment</li> </ul>
5 Open during restricted discussion	Organisational structures are reasserted	<ul style="list-style-type: none"> <li>■ Proposed changes are introduced to the organisation, where whether they are accepted is influenced by the termination procedures:                             <ul style="list-style-type: none"> <li>5a) Voting: low receptivity, tends towards abandonment</li> <li>5b) Stage-managing: greater receptivity, tends towards acceptance</li> </ul> </li> </ul>

## **2 Development**

On its own, free discussion is not enough to allow a proposed change to destabilise existing strategy. Closed meetings, may lack formal legitimacy in making decisions without recommendation to some other body. Closed meetings can be sequentially linked to other meetings, in which the Chair's authority over the agenda ensures that any proposed change can be incorporated for discussion.

Even in open meetings that have formal decision-making authority, initial proposals of change usually need to be further developed, indicating sequential links to other meetings before they are introduced to the wider organisation. Development is enabled by building bridges between meetings, such as working groups, or rescheduling for further discussion, so that conversation about the change is kept open and the change continues to be considered.

Working groups, which serve as bridges between more formal meetings, such as open meetings, are also classified as meetings that suspend organisational structure, because they bring together a group of people who normally do not work together, to undertake a task they normally do not do, and require them to interact until the task has been completed.

Because working groups suspend organisational structure, they enable a change to persist and to gain momentum through one or more open meetings, as indicated by the double-headed arrow in Figure 1. They are central in developing strategy changes.

#### **(i) Restricted free discussion**

In this study, there were no changes proposed at open meetings with restricted free discussion. During restricted free discussion, organisational structures are reasserted, albeit in the background, which restricts the self-organising nature of discussion. While these types of meetings might potentially surface a change to existing strategy, it is unlikely to be acknowledged but rather suppressed in favour of reasserting strategic stability.

Our study indicated that meetings with restricted free discussion enable top managers to exercise their privileged position within the conduct of the meeting. Because they are able to shape the nature of discussion, they can use such meetings to make sure changes that they do not approve are abandoned.

Changes are not always abandoned during restricted free discussion, as this form of meeting conduct can also be part of the sequential development of a change, passing it through a series of meetings to increase its visibility and, hence, momentum, on the way to a final meeting where it becomes part of the organisation's structure.

However, if a change is mainly developed through restricted free discussion, it is unlikely to provide sufficient suspension of organisational structure for confidence and momentum about destabilising existing strategic orientations to occur, so that the change will be abandoned when it is taken back to the organisation.

Restricted free discussion may thus serve the interests of top managers in abandoning changes or may be used to pass changes through an evolutionary path, but holds the risk of abandonment ultimately, if it is the primary mechanism used to develop a change.

### **3 Termination point**

Finally, a proposed change will reach a termination point, which means that it must be resolved in some way and built into the organisation. At this stage, most proposed changes are moved onto the agenda of an open meeting with restricted discussion. While such meetings have the least suspension of organisational structure and so, do not enable proposed changes to emerge, they are important in the selection of changes. The function of open meetings with restricted discussion is to draw symbolically on assumptions of democracy within organisational structures in order to validate proposed changes as part of the wider organisational decision-making process.

These meetings are thus indicative of how receptive the organisation is to any proposed change. Where a change has been developed through a series of meetings, with opportunity for free discussion, it is likely to have taken into account how receptive the wider organisation is to the proposed change during its progress, so that it can be stage-managed for presentation to the organisation at a large open meeting with restricted discussion.

Stage-managing the termination of a carefully-nurtured change increases the chances of that change contributing to the destabilising of existing strategy. By contrast, if a change has not been developed by going through a series of meetings, during which it can be carefully shaped taking into account how it is likely to be considered in the wider organisation, then it is likely to be a source of contention when put back to the wider organisation.

As a result the organisation is likely to be unreceptive to the proposed changes in the final meeting, requiring the meeting to resort to mechanisms such as voting in order to gain a resolution about the proposed change. Voting is indicative of low organisational enthusiasm for a proposed change and, in this study, led to proposed changes being abandoned.

### **4 The classification of meetings and their effect on strategic change**

This classification of meetings and the way that progression through the classification shapes the micro-evolutionary path of a proposed change, illustrates how different types of meetings as strategising episodes contribute to the stabilising or destabilising of organisational strategy.

- The characteristics identified in the initiation, conduct and termination of a meeting, all contribute to the suspension of the existing organisational hierarchies and structures. Greater suspension of organisational structure is important for the initial proposal of change.
- Suspension of organisational structure, combined with sequential links between meetings is important for developing the change and enhancing its chances of acceptance.
- Lower suspension of organisational structure is important in terminating the path of a proposed change and building back into the organisation.
- The specific termination mechanisms indicate how receptive the wider organisation is to selecting the change, with its potentially destabilising effects on the existing strategy.


## 1 Implications for practice

The findings from this study have significant implications for the way strategy is formulated and changed in organisations. Managers in democratic, consensus-based organisations, business units, or teams, which typically have diffuse power relationships and multiple and ambiguous goals, are under increasing external pressure to generate coherent strategy within their organisations. This covers an increasing number of organisations as management structures become more networked.

Managers in such situations might use the findings in this briefing to reflect on their own skills in shaping the structure and conduct of democratic governance mechanisms, such as meetings, and how these might be better employed to enhance both proposals for strategic change and also the organisation's attitude towards those proposals.

## 2 Setting aside organisational hierarchies and structures

Strategy meetings are micro-evolutionary mechanisms that, in some cases, temporarily set aside the usual organisational hierarchies and structures, destabilising existing strategy by providing opportunities for reflection that enable changes in strategy to be proposed and potentially accepted by the organisation.



The findings from this study have significant implications for the way strategy is formulated and changed in organisations.

Some meetings, such as closed meetings, suspend organisational structures to a greater extent, while large open meetings tend to have organisational structure still very much evident.

Other meetings switch between greater and lesser suspension of organisational structures, depending on how they are conducted, for example, the extent to which discussion is free or restricted.

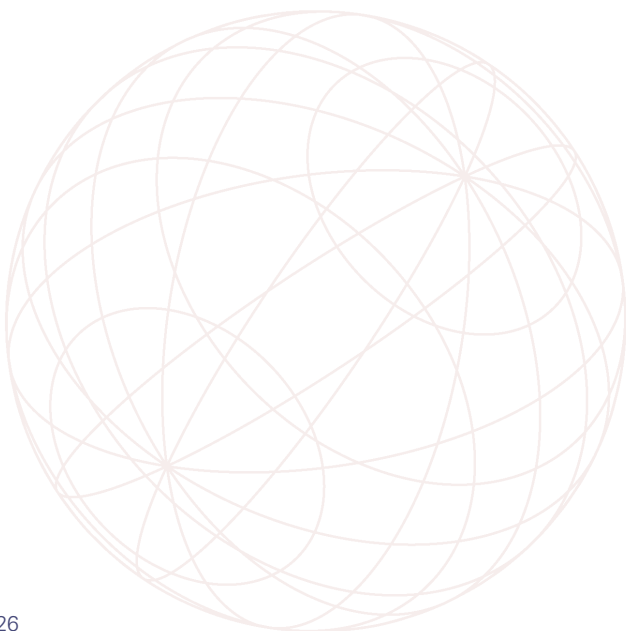
### **3 Types of meetings and their effect on strategy development**

Our classification of meetings shows the specific characteristics of *initiation*, *conduct* and *termination* lead to greater or lesser suspension of organisational structures and that this degree of suspension shapes the initiation and development of proposed changes to existing strategy.

The classification shows differences in the way that meetings are structured, and the different implications that this has for stabilising or destabilising organisational strategy. In particular, we develop an empirically informed micro-evolutionary path that the changes take from proposal, to development, to acceptance or abandonment, according to how the meeting is conducted.

This study confirms that meetings, despite their ritualistic nature, can indeed be more than symbolic 'rubber-stamping'. The analysis provides evidence of the functions that specific meeting characteristics, such as agendas, chairing, minutes and forms of discussion, serve in suspending organisational structures and shows how this varies according to whether a meeting is open or closed.

Finally, the classification shows how meetings are related to each other, how they keep topics alive, and the implications of different forms of meeting for shaping strategy.

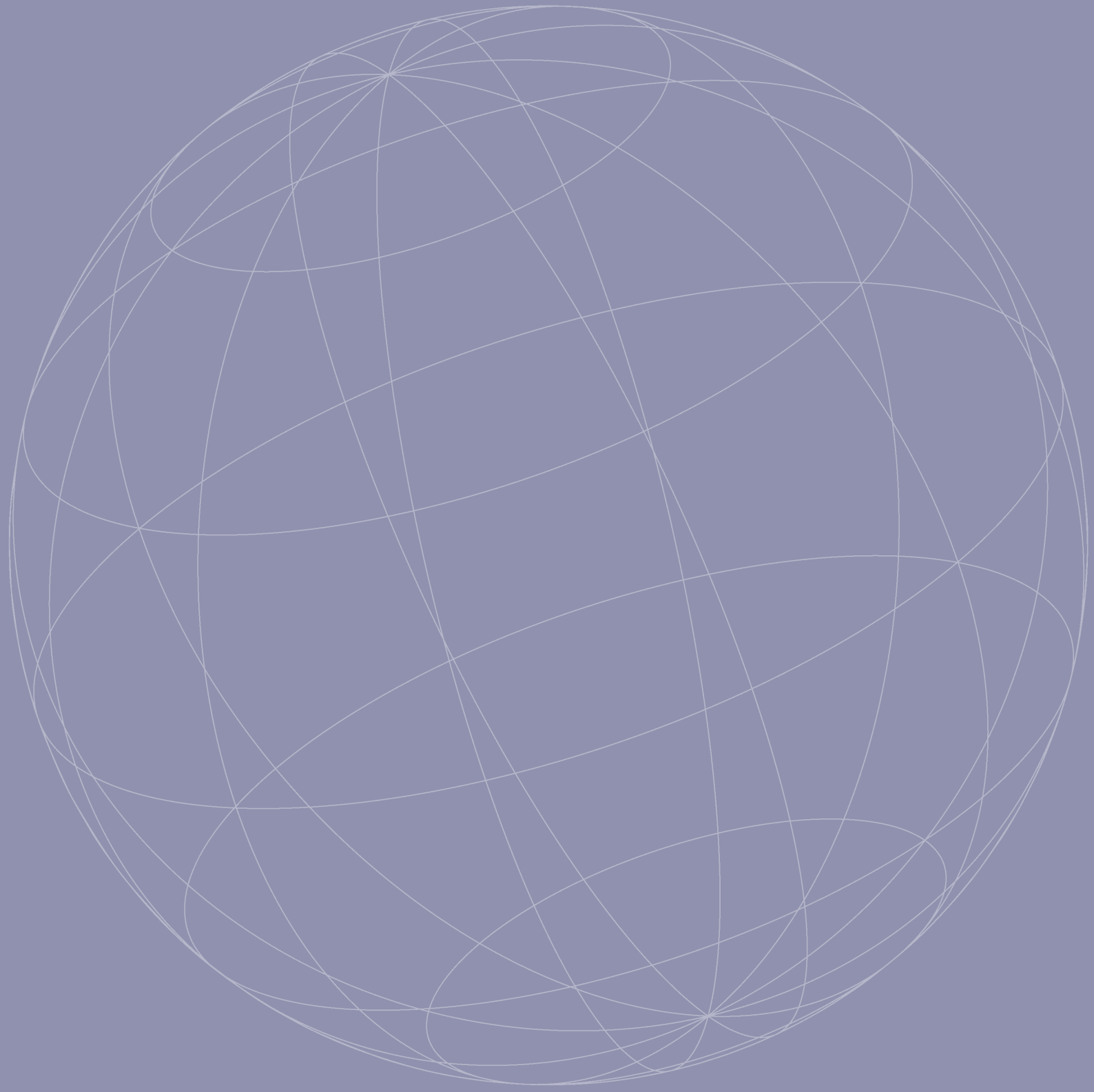


<sup>1</sup> Boden, D., (1994) *The Business of Talk: Organizations in Action*. Cambridge: Polity Press; Schwartzman, H. B. (1989) *The meeting: Gatherings in organizations and communities*. New York: Plenum.

<sup>2</sup> Ibid.

<sup>3</sup> Boden, D., (1994) *The Business of Talk: Organizations in Action*. Cambridge: Polity Press; Kieserling, A. (1999) *Kommunikation unter Anwesenden: Studien über Interaktionssysteme*. Frankfurt a.M.: Suhrkamp; Seidl, D. (2005) Organization and Interaction. In Seidl, D. and Becker, K.H. (eds.) *Niklas Luhmann and Organization Studies*. Copenhagen: Copenhagen Business School Press, pp. 145-170.

<sup>4</sup> Ibid.



## **AIM – The UK’s research initiative on management**

If you are interested in working with AIM Research, require further information or to access the following:

- Full UK programme of AIM workshops, conferences and event listings
- Fellows’ profiles and full research project details
- AIM quarterly Newsletter and press releases
- Research papers and AIM publications available as downloads
- Information for the media

*please visit AIM’s website* **[www.aimresearch.org](http://www.aimresearch.org)**



Advanced Institute of  
Management Research

### **For all enquiries please contact:**

Advanced Institute of Management Research (AIM)

Tel: +44 (0)870 734 3000

Fax: +44 (0)870 734 3001

Email: [aim@london.edu](mailto:aim@london.edu)

Web: [www.aimresearch.org](http://www.aimresearch.org)

The Advanced Institute of Management Research (AIM) was founded in October 2002. It is a multi council initiative of the UK’s Economic and Social Research Council (ESRC) and Engineering and Physical Sciences Research Council (EPSRC) – with activities at over 30 institutions in the UK and overseas.

ISBN 978-1-906087-03-6