Strategic planning as communicative process

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Abstract

This paper examines the construction of a strategic plan as a communicative process. Drawing on Ricoeur's concepts of decontextualization and recontextualization, we conceptualize strategic planning activities as being constituted through the iterative and recursive relationship of talk and text. Based on an in-depth case study, our findings show how multiple actors engage in a formal strategic planning process which is manifested in a written strategy document. This document is thus central in the iterative talk to text cycles. As individuals express their interpretations of the current strategic plan in talk, they are able to make amendments to the text, which then shape future textual versions of the plan. This cycle is repeated in a recursive process, in which the meanings attributed to talk and text increasingly converge within a final agreed plan. We develop our findings into a process model of the communication process that explains how texts become more authoritative over time and, in doing so, how they inscribe power relationships and social order within organizations. These findings contribute to the literature on strategic planning and on organization as a communication process.

Keywords
decontextualization, organizational communication, recontextualization, strategic planning

Introduction

This paper looks at the way that texts within the planning process, such as PowerPoint presentations, planning documents and targets that are part of a strategic plan, are constructed in practice, through a series of communicative interactions. Communicative interactions occur within different media, such as board meetings (Denis, Langley, & Rouleau, 2006; Jarzabkowski & Seidl, 2008), committees (Hoon, 2007), and informal, social interactions (Balogun & Johnson, 2004, 2005; Rouleau, 2005), as well as through disseminated texts, such as documents and emails (Mantere &

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Vaara, 2008). This paper focuses particularly on the reciprocal relationship between formal strategy texts as evolving structural representations of an intended strategy and the agency of those actors involved in shaping the strategy text (Cooren & Fairhurst, 2004; Cooren & Taylor, 1997; Putnam & Cooren, 2004; Taylor, Cooren, Giroux, & Robichaud, 1996).

Based on the design school (Mintzberg, 1990), strategic planning involves a set of planning activities such as setting objectives and goals, developing targets and performance indicators, and allocating resources (Ackoff, 1970; Ansoff, 1991). However, the value of strategic planning is heavily debated within the strategic management literature (Miller & Cardinal, 1994). For example, Mintzberg (1994) argued that the institutionalization of strategic planning within organizations detaches the planning activities from the doing of strategy. Hence, its activities, embedded in formalized planning systems, become marginal in the actual strategy making. The institutionalized nature of strategic planning is reinforced by the use of formal strategic plans (Mintzberg, Ahlstrand, & Lampel, 1998). While such formal strategy documents purport to capture an organization's intended strategic directions (Mintzberg & Waters, 1985), Mintzberg et al. (1998, p. 64) claimed that 'plans, by their very nature, are designed to promote inflexibility'. Mintzberg and colleagues thus argued that strategic planning has never been strategy making, and that the failure of planning stems from its formalized and institutionalized nature (Mintzberg et al., 1998). Such critique is reflected in a steady decrease in publications on strategic planning since 1994 (Whittington & Cailluet, 2008).

Despite heavy criticism and a declining interest in strategic planning within the literature, recent studies illustrate that planning remains a popular activity within organizations (Hodgkinson, Whittington, Johnson, & Schwartz, 2006; Rigby, 2003; Whittington & Cailluet, 2008). For example, Grant's (2003, p. 499) study of eight oil majors showed that 'all the companies in the sample engaged in a formal, strategic planning process built around an annual planning cycle'. During this process, strategy documents were central in capturing the developing strategy as they were constantly revised until a final plan was approved. Such studies on the persistence of planning highlight two features of planning in organizing strategy-making activities. First, power relations are inherent in planning activities (Narayanan & Fahey, 1982); for example, senior managers and corporate planning departments hold control over who participates in planning activities and ultimately in the content of a plan (Grant, 2003; Mantere & Vaara, 2008). Planning activities thus ascribe different strategy roles to organizational members (Mantere, 2008) and influence the suppression or promotion of different interests within the organization (Hardy & Clegg, 1996; Lukes, 1974). Second, strategic planning is perceived as important for communicating an organization's strategy internally and externally (Bartkus, Glassman, & McAfee, 2000; Beer & Eisenstat, 2000; Kotter, 1995; Mintzberg, 1994). While most of these authors have assumed that communication occurs after the formation of the plan, others indicate that communication is important during the formation of the plan (e.g. Grant, 2003; Ketokivi & Castañer, 2004; Lines, 2004). However, the communicative purpose of planning, the activities that are involved in communication, and its impact on either organizational members or on the plan itself are still under-researched. That is the focus of this paper.

While planning activities are seen to be detached from actual strategy making (Mintzberg, 1994; Mintzberg et al., 1998), empirical studies have demonstrated that they are still deeply embedded in organizations, for instance in the formalized steps reified in an annual planning cycle (e.g. Grant, 2003). However, little is known about the actual activities which lead to the formulation of a strategic plan, or the purpose that these activities serve within organizations. This lack of knowledge is also reflected within the strategy-as-practice perspective, which calls for studies that illuminate the micro-activities involved in the social accomplishment of strategy (Jarzabkowski, 2005;

Jarzabkowski, Balogun, & Seidl, 2007; Johnson, Melin, & Whittington, 2003; Johnson, Langley, Melin, & Whittington, 2007; Whittington, 2006). Our paper responds to this gap in the literature. In order to reveal those activities that constitute formal strategic planning and their purposes and effects, we draw upon a communication lens, in particular the Montréal School of organizational communication (Cooren & Taylor, 1997; Robichaud, Giroux, & Taylor, 2004; Taylor et al., 1996).

Theoretical Framework

The Montréal School's foundations are based on seminal works that conceptualize social order as the ongoing interplay of individuals and material aspects of human life (cf. Giddens, 1984; Latour, 1987, 1993; among others). It moves away from the simplistic idea of communication as message exchange between sender and receiver (Shannon & Weaver, 1949) to a more fundamental view of communication as organizing social life. In this view, organization is not a pre-existing and separate entity to communication but rather is constituted within and brought into being through a communicative process (Taylor & Van Every, 1999). Such an approach highlights the duality between action and structure (Fairhurst & Putnam, 2004; Putnam & Fairhurst, 2001) and consists of a recurrent, reciprocal relationship between text and agency (Cooren, 2004)/conversation (Robichaud et al., 2004; Taylor et al., 1996). Within this dialogic, texts are both the medium and the product of a communicative process, with some texts becoming increasingly abstracted representations over the course of multiple iterations. These provide 'authoritative texts' which inscribe an organization's legitimate courses of action and its constituting power relations (Kuhn, 2008, p. 1236). Thus, specific texts direct attention and discipline individuals' activities (Kuhn, 2008).

Within a communicative process, organizing occurs through co-orientation. Co-orientation focuses on a common object – the content of what the interactions are about – that emerges out of the ongoing interactions (Kuhn, 2008; Taylor, 2003; Taylor & Robichaud, 2004). Each interaction has to be seen as taking place reflexively because it refers to what went on prior to the current interaction. As any specific interaction is part of sequentially occurring interactions, it becomes the reference point for future interactions. Hence, it is crucial to consider the situational and contextual nuances that embed a social interaction, such as the language system and temporal location of the actual interaction, as they shape both its production and perception (Bakhtin, 1986; Taylor & Robichaud, 2004). In the management literature, these nuances are also referred to as [gránde] Discourse (Alvesson & Kärreman, 2000), genres (Bazerman, 1995, 2003; Orlikowski & Yates, 1994), or societal and historical practices (Chia & MacKay, 2007; Whittington, 2006), to name but a few.

Drawing upon the organizational communication literature, we re-conceptualize strategic planning as being constituted through a communicative process. This view goes beyond the commonly held perspective within the strategic management field, which considers communication as occurring after a plan is developed (e.g. Bartkus et al., 2000; Beer & Eisenstat, 2000; Kotter, 1995; Mintzberg, 1994; Mintzberg et al., 1998), to regarding the plan as an emerging text that shapes and is shaped by the communication process. We suggest not only that the strategic plan is the result of planning activities but also that it shapes the planning activities that take place during the process of its development. Through these recursive activities the formalized planning process, which has often been regarded as taken-for-granted, is constantly constructed.

In order to further elaborate the Montréal School of organizational communication, we draw upon one of its founding philosophers, Paul Ricoeur (1981). In particular, we explain two of his concepts, recontextualization and decontextualization, in order to theoretically frame those activities that constitute strategic planning. However, let us first outline what we understand by the term text, as there have been different conceptualizations (Putnam & Cooren, 2004). While text is often

referred to as both oral and written discourse (see Cooren & Taylor, 1997; Kuhn, 2008; Putnam & Fairhurst, 2001; Robichaud et al., 2004; Taylor & Robichaud, 2004; Taylor et al., 1996), we distinguish between talk and text (see Ricoeur, 1981). *Talk* is considered as any orally expressed discourse. It occurs in a current, immediate context and situation. We refer to any discourse or ideas expressed in writing as *text* (Ricoeur, 1981). A text may be based on anterior talk and/or an author's individual ideas which he/she may not have voiced before. In a text however, the author's intention, which is inherent in the materialized statement, becomes objectified. Hence, situational aspects, such as time, place, to whom and why a particular statement is made, cannot be traced in the written statement. Rather than negating context, a criticism of many organizational discourse analyses (Putnam & Fairhurst, 2001; Sillince, 2007), Ricoeur (1981) positions talk within the immediate context of its production, whereas text can move between contexts, albeit losing much of the contextual elements of its production. This distinction between talk and text enables us to examine the strategic plan as a text – a written document – that is constructed in a relationship with the talk that occurs during the activities of the strategic planning process.

For Ricoeur, the fundamental reason to distinguish between written and spoken discourse lies in the notion of distanciation. Distanciation occurs when talk becomes materialized in text. Thus, the text inscribes the meaning of what was said. However, through distanciation the speaker's mental intention becomes detached from the meaning expressed in the text. Fixation within text enables the talk to become an object which may be stored and archived. It is thus accessible to others and may endure over time and space (Smith, 1984). Distanciation therefore leads to the *decontextualization* of the talk. The text is freed from the context-bound and situational talk upon which it is based and appears as an atemporal object (Ricoeur, 1981). Ricoeur thus highlighted that 'the text possesses an inherent plurivocity that allows it to be construed in more than one way' (Thompson, 1981, p. 53), as it may be interpreted by multiple individuals or by the same person again and again.

The actualization of a text in talk may be better understood through the concept of recontextualization. For recontextualization to occur, a text needs to be enacted by an individual in his/her talk. As such talk occurs in a different situation and is most likely to be embedded in a different context from that in which the text was produced, individuals try to relate the text to their current, contextually embedded situation. That is, they move the text into their current context and interpret it within that context. Thus, a text becomes recontextualized as an individual actualizes the meaning of the text in his/her current situation. This context includes both the specific surroundings, such as a meeting, in which the talk takes place and also the individual context, such as the speaker's role in the organization, which shapes his/her relationship to the text. As the text inscribes decontextualized meaning (Ricoeur, 1981), there may be multiple, even competing, interpretations among several individuals when enacting the same text in new contexts. We thus need to understand better the recursive association between the multiple meanings of a text, as it is recontextualized in talk, and the way those meanings assume some collective properties in the relatively durable and decontextualized form of a text. While others have also alluded to this cycle of recontextualization and decontextualization in text–talk relationships, in particular highlighting how texts assume increasingly durable representations of the 'real' (Iedema, 1999, p. 51), Ricoeur's specific concepts have not been widely used empirically in the management literature, particularly in terms of their recursive relationship over time. Indeed, this gap has been the basis for calls for further empirical research (e.g. Iedema & Wodak, 1999), which this paper addresses by operationalizing the strategic planning process as a text–talk production cycle.

Our conceptualization provides the basis to reveal those planning activities that constitute a formalized planning process, and at the same time construct a tangible outcome of this process, the strategic plan. We elaborate on Taylor et al.'s (1996) concept of 'text' by distinguishing at a conceptual level

between oral talk and written documents, in our case a strategic plan. This distinction between oral talk and written text is somewhat controversial (see, for example, the account of the debate between Derrida and Searle in Cooren & Taylor, 1997). Most communication and discourse scholars, consistent with Taylor et al. (1996), view text as both oral and written production of discourse. We do not disagree but find Ricoeur's conceptual distinction between talk and text useful for specific types of phenomena and research questions that examine the production of a written text, such as a plan. By conceptually isolating talk from text, we can avoid the problems of conflation that arise when attempting to examine the specific production of a written text.

As Cooren (2004) notes, it is important not to downplay the role of texts as material artifacts that are part of constructing social reality. Drawing upon Derrida (1988), Cooren (2004) introduces the concept of textual agency. The objective, pre-existing properties of language afford actors the necessary medium to express intentions, be heard and read, and hence to have agency. Cooren (2004; Cooren & Fairhurst, 2004) takes this notion of textual agency into the realm of written texts, with their durability across time and space, emphasizing their role in constituting modes of being, such as organizations. He illustrated that documents *do* things, for instance memos inform actors' responses to issues and work orders direct and restrict attention to certain behaviour. Furthermore, Bazerman (1997) showed that pilot checklists regularize and structure talk of pilots with co-pilots, navigators and the control tower before take-off. While Bazerman (1997) indicated that checklists' authoritativeness resulted from a mesh of activities in the past, which are captured in the checklist as a textual artifact, he fell short in showing how this textual agency may come about.

Whether texts gain authoritativeness depends on the settings and processes embedding their production, as Weick (2004, p. 408) indicated, 'texts produced in interaction effectively represent both the world around the conversation and the conversation itself and provide a surface that affords narrative reasoning'. Fundamentally, the construction of a text is a recursive process, in which the context of text production – its talk, purpose, participants and setting – shapes the text, even as coming together to produce the text shapes the context in which it is produced. Through this recursive interaction between talk about the plan and the way that talk is manifested in the written text itself, a plan is a product of the planning context, even as the planning process also constructs that context. A plan draws legitimacy from being constructed in such a way, through a communicative process in which it is both shaped by and shaping of the context. The resultant document becomes authoritative because the actual textual artifact is perceived by participants to reflect both the context and the process in which it was constructed; it is situated in the time and place of its production. It is not simply that the plan reflects an organization's future directions, through its mission statements, objectives and goals (Ackoff, 1970; Ansoff, 1965), but that the legitimacy of these objectives and goals derives from the authoritativeness of the plan, and this authoritativeness is constructed in the communicative process of planning (Kuhn, 2008; Winsor, 2000). This perspective on planning does not view the strategic plan or the process of developing the plan as strategy itself, but rather considers the nature and purpose of those communicative activities through which the institutionalized activity of strategic planning is constituted in organizations (Giraudeau, 2008; Grant, 2003; Whittington & Cailluet, 2008).

Based on the above literature review, we view the strategic planning process and the production of a plan as a communicative process, deriving the following research questions: *(1) How is a strategic plan constructed as a communicative process?; (2) What are the implications of this communication process for (i) the plan; and (ii) the plan's production process?*. In current organizational research, documents have largely been taken for granted (Reeves, Ford, Duncan, & Ginter, 2005). Adopting an approach which examines the recursive relationship between text and talk is a novel and insightful way to investigate the activities involved in strategic planning because it places the plan at the centre

of the process, as a textual artifact that is constructed in and constructs the communicative interactions between actors. That is, a planning document is both constructed through communication but also acts as an outcome of ongoing communications, by capturing and stabilizing preceding communications, and shaping future communications. The planning document is thus a textual representation that both constructs and is constructed by the strategic planning activities.

Research Method

Case selection and data collection

Universities provide a valuable context in which to study strategic planning as a communication process for two reasons. First, others have found that universities typically follow ritualized strategic planning cycles in order to be accountable to external bodies (Birnbaum, 2000; Hackman, 1985; Hardy, 1991; Jarzabkowski & Wilson, 2002), thus providing a suitably iterative and formalized planning process. Second, in recent years, universities have adopted private sector 'managerialism' in response to institutional pressures (Anderson, 2008; Lounsbury, 2001) associated with declining state funding, increased competition, and external requirements for public sector organizations to adopt private sector practices (Clark, 1998; Ferlie, Ashburner, Fitzgerald, & Pettigrew, 1996; Slaughter & Leslie, 1999). Under these conditions, top managers have greater responsibility for collective strategic action (Birnbaum, 2000; Denis, Lamothe, & Langley, 2001; Fitzgerald, 1994). However, despite the rise of managerial authority and responsibility, academics, as professional knowledge workers, retain power and autonomy, and so must have their views recognized in the strategy and management of the university (Hardy, Langley, Mintzberg, & Rose, 1984). Tensions over strategic direction typically arise between the economic and managerial values of administrators and the professional values of academics (Jarzabkowski & Fenton, 2006). Top managers must thus intervene in and shape strategy with consideration of the power of their academic constituents (Jarzabkowski, 2008). Participation in strategic planning by diverse university constituents is thus important (Gioia & Chittipeddi, 1991), making universities a topical research context in which to examine strategic planning as a communicative process.

As appropriate to our research focus, we adopted an ethnographic, longitudinal (12-month) single case study approach (Langley, 1999; Pettigrew, 1990; van Maanen, 1979; Yin, 1994). As we were interested in the evolving association between strategy text and strategy talk, we used theoretical sampling to select a case that reflected the phenomena under investigation (Eisenhardt, 1989). Specifically, we selected for a case study in which we could follow the institutionalized strategic planning process in detail from the initial proposal of a new strategy to the production of the final document.

This study is based on the strategic planning process in a British university (Unico). Unico is a middle-sized player within the British university sector. It does not have international recognition apart from a few subject areas in which it is world-leading. Following the recruitment of a new Vice Chancellor and a two-month settling in period to familiarize with the university and its financial and market position in various disciplines, a university-wide strategy review was announced. As we entered Unico at the start of its strategic planning cycle, we were able to follow the strategic planning activities in real time. The first author entered Unico at the initial meeting, where the new Vice Chancellor met with Unico's top management team for the first planning meeting. Thereafter, he sat in planning meetings across hierarchical and horizontal levels. Owing to the quality of access, he was also able to stay at the research site for lunches, dinners and to listen to conversations during the informal parts of meetings. This provided the research team with contextual nuances which proved helpful when analyzing the data.

Following a case study approach, we collected multiple data sources (Yin, 1994). Our main data sources, permitting us to follow the association between strategy text and strategy talk over time, were the multiple versions of the strategy document (n = 11) and meeting data (n = 25). At the observed meetings the specific textual content of each version of the strategy document was discussed. We were able to collect each version of the strategy document and to audio record 20 of the 25 meetings. Key discussions that occurred at meetings were transcribed and provided the basis for our analysis in addition to detailed observational notes that were also taken during meetings. We focused solely on formal meetings within Unico, as these were the formal planning process that we were interested in, and they provided the communicative platform in which strategy documents were discussed, as illustrated by other research within universities (e.g. Jarzabkowski & Seidl, 2008). However, we also collected data in discussions before and after meetings and through interviews. Specifically, 76 interviews were conducted throughout the strategic plan's production cycle. Multiple interviews with key participants were conducted to capture various interpretations of the plan's content as it evolved. These enabled us to understand varying interpretations of particular content formulations across Unico, which were often rooted in participants' respective work areas. Additionally, emails provided another data source, both those in which the plan was disseminated and those in which comments were made with regard to its particular content, as well as emails sent personally to the first author, as he gained the confidence of the participants. Further documents, such as meeting minutes and PowerPoints were collected, as these provided the basis to follow the decontextualization of strategy talk.

Multiple data sources enabled us to triangulate data (Hartley, 2004; Yin, 1994), so enhancing data trustworthiness (Lincoln & Guba, 1985). Data triangulation also allowed us to track changes in the strategy document over time. These changes resulted from different interpretations that were voiced by academic and non-academic groups through various communicative media, such as meetings, emails and written responses.

Data analysis

As typical with rich qualitative research, our analysis went through several phases (see Jarzabkowski, 2008; Langley, 1999; Miles & Huberman, 1994; Strauss & Corbin, 1998). First, in analyzing the overall strategic planning process, we drew upon our theoretical framework of the iterative relationship between talk and text to label the cyclical process as *strategic plan production cycle*. The underlying principle of a strategic plan production cycle is that the current state of the plan's content (what the organization will do) is illustrated in the latest version of the document. This version then provides the basis to discuss all or parts of the content of the plan at the various planning meetings. Unico's strategic plan followed a typical planning structure (see Ackoff, 1970; Ansoff, 1991), consisting of a vision, mission statements, strategic objectives and key performance indicators (KPI), each of which was developed over successive phases of the strategic plan production cycle. After most of the meetings, the text of the strategic plan was amended in the light of discussions that occurred at these precedent meetings. This new version of the strategy text then provided the basis for discussion at a subsequent meeting. The plan's production occurred iteratively until the senior management team decided that it was ready to publish as the new strategic plan.

In the second phase of analysis, we looked at the key questions being considered over the strategic plan production cycle and the participants invited to take part in these discussions, in order to identify five distinctive periods during which Unico's strategic plan was constructed (see Table 1). Period 1 (1 month) involved initial discussions about the plan's content among top management

Table 1. Unico's strategic planning periods

		Period 1	Period 2	Period 3	Period 4	Period 5
Period characteristics	Elements	**Vision**; **Mission**; Strategic objective; KPI	**Vision; Mission; Strategic objective; KPI**	**Vision**; Mission; **Strategic objective**; KPI	**Vision**; Mission; **Strategic objective**; KPI	Vision; Mission; **Strategic objective; KPI**
	Participation	(wider) **top management team**; internal stakeholders; external stakeholders; all staff	**(wider) top management team; internal stakeholders; external stakeholders; all staff**	**(wider) top management team**; internal stakeholders; external stakeholders; all staff	**(wider) top management team**; internal stakeholders; external stakeholders; all staff	**(wider) top management team; internal stakeholders; external stakeholders**; all staff
	Description	Initial discussion of strategy	Organization-wide consultation	Let's pull it all together?	Agree targets	Last twists
	Guiding question	Where do we want to be in future? What is it that we want to do?	What else should we do? What should we not do? How do we deliver (specific actions)?	Is there anything missing? Do we need to re-formulate?	Do we need to reformulate? How do we measure it?	Only specific questions please?
	Dominant pattern in plan's development	Set parameters	Open parameters	Increase specificity of parameters	Beginning to close parameters	Only very precise content changes

team members. During the second period (4 months), a university-wide consultation occurred. At the start, Unico's employees received a copy of the draft plan via email. Thereafter, three separate one-day meetings were scheduled, which aimed to generate participation from three groups; (i) a representation of Unico's recently appointed staff; (ii) senior heads across academic and non-academic departments; and (iii) members of Unico's non-executive governing board. During several break-out sessions, meeting delegates were requested to address specific questions relating to the text that was expressed in the strategic plan so far. Additionally, several non-academic departments had specific consultations with a member of the top management team to collect their views on the plan's content. This organization-wide consultation resulted in many comments which were reflected in the official meeting minutes. In period 3 (2 months), a new version of the plan was created which integrated some of the comments voiced during period 2. This amendment led to significant changes to the text. The top management team then met to agree on the actual formulations reflected in the current strategic plan. In the next period, period 4 (2 months), Departmental Managers were consulted in order to set targets. Once targets for each Mission had been agreed, they were added to the document. Additionally, minor amendments were made on the strategic plan's content. The document was finalized during the last period (2 months) and was approved by internal and external stakeholder groups. At this stage, some final tweaks were made to the plan's content, in particular in the areas of strategic objectives and KPIs. The finalized strategic plan then provided the basis for

future meetings about the University's intended strategy, particularly serving to legitimate specific courses of action; however, the content itself was no longer subject to amendments.

Third, we identified the recursive relationship between text and talk by looking at the eleven versions of the strategic plan that were constructed over the five periods we had identified. There were three main Mission areas, 'Research', 'Teaching' and 'Third Stream' (community income and engagement) in each version of the document. We then traced each change in the textual content of each Mission that occurred from one version of the strategy document to the next. We looked through the 11 versions chronologically, starting with the initial plan which was presented at the first meeting (period 1) and compared it with the next version that was provided at a subsequent meeting (see also Giraudeau, 2008). Our type of analysis may be compared to the first stages of a content analysis (Silverman, 2001). However, we were not interested in how many content changes were made but rather why and how they occurred.

During this third stage of our analysis, we also looked at other textual artifacts that could give us clues about the content changes. We thus focused on meeting minutes as these ought to provide a snapshot of *what* had been talked about at meetings. Furthermore, our interview data showed that these meeting minutes provide a basis for discussing whether and what amendments were made on Unico's strategy text. By looking at the content in the meeting minutes and the content changes which occurred from version to version, we could already identify that talk, reflected in these meeting minutes, shaped changes in text of the strategic plan.

Fourth, we looked at the actual talk that occurred during meetings. As we could audio tape most of our meetings, we were able to transcribe parts and also to go back and listen to the actual data during our analysis phase. In particular, we looked for relationships between text and talk, examining how the plan's content was invoked by the talk and also how the text shaped the talk. In looking at and comparing specific instances of the text/talk relationship we drew upon our decontextualization/ recontextualization theoretical framework in order to examine how the talk inscribed different meanings associated with the text, according to the particular contexts and social relationships between the speakers (recontextualization) and how these were associated with changes in the text (decontextualization). We also examined how the text structured and organized the talk within any particular meeting and how it organized talk over time. In particular, we examined how the strategic plan production cycle developed over time, comparing text/talk relationships across the five phases of the planning cycle that we had identified. From this we were able to identify a growing fixation in the text, as it became more distanciated and decontextualized from the initial episodes of talk and, as a result, also became more authoritative.

Based on this fine-grained analysis, we were able to tease apart the recursive talk to text relation, which occurred through recurrent iterations throughout the plan's production cycle, and these form the basis of the findings that we now present. In the first section of the findings we will illustrate the recursive interplay between talk and text by analytically differentiating between (i) a text to talk relation and (ii) a talk to text relation. In order to demonstrate the talk to text relation, we draw upon Ricoeur's (1981) concepts of recontextualization and decontextualization. This provides a detailed analysis on how strategic planning activities are constituted in a communicative process. In the second part of our analysis, we illustrate the implications, for both the plan's production cycle and the final strategic plan, of the recursive interplay between talk and text over time. In order to demonstrate the longitudinal and comparative basis for our analysis, we drew upon talk extracts from three periods, periods 2, 3 and 5. We selected these periods as they represent different stages within the strategic plan's production cycle (see Table 1) and, taken together, also show the evolving nature of the text/talk relationship over time.

Findings

In qualitative research there is always a trade-off between showing the rich data upon which findings are based and the constraints of a paper (Eisenhardt & Graebner, 2007; Golden-Biddle & Locke, 2006). This trade-off is particularly pertinent in presenting communicative episodes, where actual talk and its situational context must be analyzed. We are therefore only able to present representative extracts of communication, selected in order to progressively illustrate our conceptual points about the relationship between talk and text. The data and findings presented here are consistent with the entire corpus of data (Spee, 2010). We have selected extracts from different periods in the strategic plan production cycle, in order to illustrate how the communicative process progressed and how the plan became fixated over time.

Unico, similar to other studies of universities (e.g. Jarzabkowski, 2008; Slaughter & Leslie, 1999), was focusing upon three main strategic missions throughout the planning process; Teaching, Research and Third Stream. Since it was a small university with only a few internationally recognized disciplinary areas, a major focus for Unico was on increasing international recognition of its research, improving the international reputation for teaching and increasing engagement with its local and international communities. A major challenge for Unico was selecting specific areas on which to focus its efforts for increasing international reputation in the three mission areas. In order to provide some continuity for the reader, we have concentrated primarily on extracts related to extending the international reputation of the research mission. While academics were largely supportive of the research mission at a strategic level, because it would place them in a more internationally recognized university, they were also concerned at a personal and departmental level. In particular, they worried that Unico might exclude some areas of research or might focus only on large, commercially focused areas of research to the detriment of other forms of research. Therefore, we have selected some extracts that illustrate this dynamic in the relationship between talk and text. Appendix A provides an overview of the textual changes in Unico's Research Mission across the five strategic plan production periods.

Interplay between talk and text

In this section, we will show first how text shapes talk and then demonstrate how talk shapes text, using representative extracts of the talk occurring within meetings throughout the strategic plan's production cycle. We will then analyze and explain these extracts to illustrate how recontextualization and decontextualization occur. In this section of the findings, we present talk extracts which occurred during a top management team meeting during period 3. Unico's top management team consisted of eight members representing senior academics and administrators. The meeting was dedicated to discussing the current state of the strategy text's content which had been amended in light of comments that were voiced during university-wide consultations in period 2. At the meeting in period 3, guiding questions in relation to the text's content were "Is there anything missing?" or "Do we need to reformulate?". Based on the talk during this meeting, some parts of the strategy text were changed.

Text to talk relation

In the context of strategic planning, strategy texts, in the form of documents and PowerPoint presentations, provided the basis for discussion of strategy content in meetings. Through individuals' recontextualization, Unico's plan is actualized in the current talk within planning meetings. In this analysis we demonstrate how text shapes talk by providing a specific set of issues, which have been

framed in a particular way through the strategic plan, as the basis for discussion in a strategy meeting. We will now show three extracts of one meeting transcript (period 3). This will illustrate a text's disciplining effects during conversations, in particular how the structure and content of Unico's plan disciplines the order and the general topics of talk. During this meeting in period 3, the top management team discussed the formulation of the plan which consisted of various Missions, such as the Research Mission, or the Teaching Mission. Per Mission, there were several strategic items which expressed the strategic direction in more detail.

> Extract 1 {meeting minute 52.00}
>
> … And that's one of the reasons for having this model I think, so that we can see what would be the financial implications at least of doing some of these things. **Can we move on to five** [the Research Mission] Again, let's try and stay at the main bullet point level. What's missing? [emphasis added] (Deputy Leader)
>
> Extract 2 {meeting minute 54.28}
>
> … where it says "*where appropriate commercialize the results*", is it … (Finance Director)
>
> Extract 3 {meeting minute 65.00}
>
> … Right, let's go onto [the Teaching Mission] … (Deputy Leader)

Extracts 1 to 3 illustrate in detail how a text is recontextualized in talk. Through recontextualizing, a particular content becomes the essence of the present discussion. The plan thus shapes and at the same time restricts the current talk by setting the specific content of the immediate discussion. There are several ways that a text may be recontextualized. Extract 1 shows how the Deputy Leader draws upon the plan to support his/her top management responsibility for strategic planning. The Deputy Leader did not refer to the name of the strategic item as '*research mission*' but only mentioned the given number of the particular strategic item. The subsequent talk then focused on specific strategic issues which were expressed in the Research Mission (for example see extract 2). The discussion on specific strategic issues listed in Unico's Research Mission continued until the Deputy Leader invoked another strategic item (see extract 3). Furthermore, extract 2 illustrates how the Finance Director recontextualized a particular strategic item which was expressed in the Research Mission. The Finance Director cited Unico's strategy text verbatim ('– *where appropriate commercialize results through*'), thus creating a specific reference to the strategic item under discussion. Following each recontextualization, the talk by other participants then focused on this specific issue until another strategic item was invoked.

Extracts 1 to 3 also illustrate how the talk is shaped by the structure and sequence of the strategy text's content. While there was no specific agenda for this particular meeting in period 3, the order of the strategic items in the document had a structuring effect on the discussions. The meeting started by discussing the Vision and finished once there were no further comments on any strategic item of the last Mission. The disciplining effect of the strategic plan was not an exception at this meeting. During meetings at other periods, the order of the Missions and the strategic items in the document also shaped the order of discussion, even to the extent of creating the sequence for specific break-out sessions and the topics to be discussed during break-outs. This organizing role illustrates the authoritative nature of the planning text as it inscribes both what may be talked about and in what order it should occur.

Talk to text relation: Recontextualization

We now draw attention to the relation of *talk to text*. The talk to text relation occurred throughout the strategic plan production cycle, with each period characterized by different guiding questions which further shaped the discussions of the strategy text (see Table 1). In this analysis, we draw upon Ricoeur's (1981) notion of recontextualization, which occurs as the content is enacted in talk. The strategy text's content provides the basis for recontextualization, as an individual makes explicit his/her interpretation of the current strategy text in the present situation. This present situation involves recontextualizing because it differs from the preceding context in which the current version of the strategic plan was constructed. The talk also involves recontextualizing for each individual in terms of their own organizational role and relationship to the text.

We selected an example that is representative for talk that resulted in a textual amendment to the content of the next version of Unico's strategic plan. This example is based on the same meeting during period 3 and extends extract 2 from the above meeting during period 3 '– *where appropriate commercialize results*'. This item of the strategic plan was actualized by the Finance Director and is then followed by utterances of Departmental Head C and the Deputy Leader.

Extract 4

1	Finance Director:	… where it says '*where appropriate commercialize the results*', is it
2		just where appropriate or should we be encouraging people to focus
3		their research into areas that can be commercialized?
4	Departmental Head C:	Well that's why I put down foster entrepreneurship.
5	Finance Director:	Rather than just doing blue sky stuff that …
6	Departmental Head C:	Yeah, fostering entrepreneurship whether it's the perspective …
7		because to me, '*understanding and responding to the needs of user*
8		*communities*' is just consultancy. We want more than that you know,
9		we want people to recognize that they may have potential to
10		commercialize.
11	Deputy Leader:	I would not want to stop people doing blue-skies research, if they can
12		get the funding from the research councils or wherever to actually do
13		that.
14	Departmental Head C:	Yeah, but blue-sky research often does result in commercial
15		application. The only trouble is, other academics don't recognize it
16		most of the time unless they're quite astute. To my knowledge it was
17		never really … you know, the research I can gather was obviously to
18		look at new types of drugs, but it was only somebody saying 'We've
19		got a good idea here, let's patent it first before we go any further' …
20	Deputy Leader:	But when you develop a new intervention like that, I would have
21		thought all the time you'd got the view that you actually want to do
22		some good for society, you want to be able to help people who've got
23		cancer and therefore you're developing something, you're doing
24		research in something that's going to have some sort of benefit.
25	Departmental Head C:	You know, the key phrase … patent lawyers, is when they look
26		at their workers' papers when they publish it, before or after patenting,
27		is that giveaway sentence at the end of the paper which ruins the
28		patent, and academics are often not aware of that and publish things.
29		All I'm really saying is that fostering entrepreneurship … blue-sky
30		research is fine …

31	Deputy Leader:	Well let's put another bullet point in there, yeah. But I really do think
32		it's '*where appropriate*', because in some instances it may not be
33		appropriate. In some of [Department D's] research which is going on
34		there may just not be commercial applications for it. Some of the things
35		that are going on in [sub group of Department D], there may not be
36		commercial applications.
37	Departmental Head C:	They're limited areas though.
38	Departmental Head A:	Anyway, we're agreed, foster entrepreneurship and where
39		appropriate commercialize.
40	Deputy Leader:	Yeah. So any other ...

We will now explain extract 4, showing how three top management team members recontextualized this particular item within the Research Mission, which had already been in the document for six months. The strategic item under discussion was invoked by the Finance Director (see line 1), who suggested amending the current formulation of Unico's strategic direction (in Version 6) so that it expressed a focus on all research being commercially viable and avoiding '*blue skies research'* (line 5) which may not result in commercial benefits. In doing so, the Finance Director, who is an administrative member of the top management team, was recontextualizing the plan according to his managerial values and relationship to the strategic plan by emphasizing its measurable commercial objectives. However, while the Finance Director could draw upon textual agency to motivate a particular episode of talk, the text could not dictate the meanings attributed to the text by other members of the team, who espoused academic values on the nature of research. Departmental Head C responded to the text by suggesting the addition of '*foster entrepreneurship'*. The Deputy Leader, who is not only a top manager but also an academic, then revealed his academic intentions that Unico's strategic direction should not neglect '*blue skies research'* (lines 11 to 13), so countering the Finance Director's suggestion. Departmental Head C supported this meaning structure and related it to the existing text by pointing out that '*but blue-sky research often does result in commercial application*' (lines 14 to 15), emphasizing his/her own contextual relationship to the plan with supportive examples from his/her own research area (lines 17 to 19). In support of the academic values that respect both commercial and non-commercial applications of research, (see lines 31 to 36), the Deputy Leader expressed a preference for retaining '*where appropriate*'. Departmental Head A then enters the talk summing up the various statements made by Departmental Head C and the Deputy Leader (lines 38 to 39), so combining the commercial and academic values, but did not feature any of the Finance Director's suggestions about providing a specific commercial focus to research. Thus, the text can be drawn upon to motivate episodes of talk. However, recursively, the text and its amendments must reflect the meanings and values of those actors who recontextualized it in their talk.

Based on the talk illustrated in extract 4, we have seen that there are multiple interpretations of a particular strategic item. As individuals expressed their views, they revealed their intentions in relation to the current text which resulted in suggestions to make content amendments to the next version of the strategic plan. Our example showed three potential suggestions of how the strategic item could be amended: (a) a sole focus on research which is commercially viable (Finance Director); (b) a slight amendment to the strategic item by introducing the notion of entrepreneurship (Departmental Head C); and (c) an increasing recognition for blue skies research (Deputy Leader). Not to alter the text would also be another alternative. In order to shed light on how the strategic item was altered to reflect the various values expressed in the talk, we draw upon the concept of decontextualization (Ricoeur, 1981).

Talk to text relation: Decontextualization

Decontextualization refers to talk becoming materialized in written text. While recontextualization happens at the immediate event of talk; decontextualization occurs at a different point in time, often physically distant from the actual event of talk. In order to illustrate how decontextualization occurs, we draw upon our previous example. As a result of the talk (see extract 4), an amendment to the existing strategic item occurred which then stated "– Foster entrepreneurship, and where appropriate commercialize results of research through" (Version 7). This resulted from Departmental Head C's (line 4) suggestion 'I put down foster entrepreneurship' and the Deputy Leader's strong notion to retain '*where appropriate*' (see lines 31 to 36). The text amendment was further supported by Departmental Head A, who expressed a potential formulation (see lines 38 to 39), which was then adopted. This example showed that only one of the possible three suggestions (alternative b) led to an actual content change within the strategic plan, whereas alternatives a and c were neglected. Following this meeting in period 3, there were no further content changes with regard to this strategic item, which now reflected Unico's commercial and academic values concerning research.

   We will now draw upon the concepts of fixation and distanciation in order to show how decontextualization occurs in more detail. In our example, we saw that talk, specific suggestions to amend the strategic plan's content, led to an amendment in the actual text's formulation. Hence, the talk's content became fixated as the words '*foster entrepreneurship, and*' (Version 7) were added to the existing strategic item '*– where appropriate commercialize results through*…' (Version 6). Automatically, distanciation occurred as the meaning of the written statement was detached from the speakers' mental intentions (Finance Director, Departmental Manager C and Deputy Leader). Hence, in the strategic document there is no reference to who made the actual comment (Departmental Head C in line 4) which then led to the actual content change. The materialized strategic plan then appeared in its decontextualized form, as this new version (Version 7) provided the basis for discussion during future situation(s), which involved different individuals to those who made the comment that led to the content change. There is no reference to the context-bound and situation-based talk, upon which the content change is based. Thereafter, the strategic item remained unchanged and was thus manifested in Unico's final strategic plan. These findings about how text becomes fixated, inscribing particular courses of action that are distanciated from the discussion in which they were developed, are important. Once the plan's production cycle was completed, Unico's strategic plan document provided the basis for legitimizing courses of actions, without a reference to the talk which led to the manifestation of its content. Hence, textual changes such as commercializing research while also providing flexibility to support academic research values through the incorporation of '*where appropriate*' are important in terms of the future research directions that will be legitimate at Unico.

Recursive interplay between talk and text: Constituting the strategic plan production cycle

As the first part of our analysis showed, through the presentation of representative talk–text episodes, strategic planning is constituted in the recursive interplay of talk and text. In this section, we show the processual nature of the talk–text relationship over time. Unico's strategic plan is constructed through an iterative cycle of recontextualization and decontextualization. However, these iterations are not simply discrete and episodic. Rather, there is a recursive relationship between talk and text, with the meanings expressed in talk and text shaping each other and becoming progressively more interpenetrated throughout the planning text production cycle until they culminate in

Unico's final strategic plan. In the following analysis, we will demonstrate (i) the implications of content changes for Unico's final strategic plan and (ii) a shift in the talk to text relation during the strategic plan's production cycle. It is not possible to present talk–text episodes from every planning period, or to cover all the issues, within the constraints of a single paper. However, in order to extend our analysis of extracts from period 3 above, we will draw upon representative talk extracts from meetings that occurred in periods 2 and 5. Taken together, these extracts will indicate how the text–talk cycle evolved from the early period of the strategic plan production cycle to the final period (see Table 1).

Implications for the content of the planning text

The example illustrated in extract 5 was taken from one meeting in period 2. During this period several meetings were held to consult on Unico's draft plan with staff and governing bodies. This period was characterized by questions about *what else should we do (or not do)?* and *how do we deliver (specific actions)?* (see Table 1), which were posed to the meetings' participants. Unico's planning text was thus open for amendments. The talk extract we will now draw upon occurred at a meeting with a selection of recently appointed staff. During several sessions on the day, break-out groups debated various parts of this draft plan. After each session, one or two representatives from each group expressed the discussions held within the respective break-out group. Extract 5 illustrates talk which occurred in relation to Unico's Research Mission. The two delegates enacted the following strategic item from the planning text: '– *known for our international research centres in a small number of key areas*' (Version 3).

Extract 5

A1	Delegate A:	… We also tried to discuss the... trying to focus research into particular
A2		areas. We had a worry that certain small research projects would become
A3		very marginalized and maybe not get done even though they could be
A4		good earners for the university in years to come. …
		......………………………………………………………………………………
B1	Delegate B:	… We had issues over how the university would choose its area for focus
B2		or its areas for focus of the research and whether that would be driven by
B3		the expertise that it currently has within the university which would
B4		generate the focus. Which may or may not be a need in the marketplace
B5		or it may be something worth researching which we could then go out to
B6		the marketplace and convince them it's something they should be
B7		interested in. However, as one of the other groups has suggested, we
B8		sought the benefit of some thematic areas where... maybe for example in
B9		[Delegate B's research area], which would be my area, which has
B10		implications for infectious disease and cancer and naturally would bring
B11		together or should bring together interdisciplinary research with the
B12		engineers and other experts, into preferably not a virtual institute but a real
B13		institute where these people are together. …

As a result of these comments, the strategic item was amended and was expressed in a new version of the planning text as '– *known for international centers in key areas*' (Version 4). We will now demonstrate the implications of this particular content change for Unico's strategic plan. If we compare the statements that expressed the same strategic item across these two versions, we can see that its meaning was altered to better reflect academic values about retaining academic autonomy over

the focus of research, rather than narrowing research scope to reflect only strategically defined foci. While in Version 3 of Unico's strategic plan the strategic direction on research was expressed as '*known for … a small number of key areas*' [emphasis added], in a subsequent version its focus broadened as it stated '*… in key areas*' (Version 4). Such content change resulted in a larger number of research areas being included in Unico's research focus.

These textual changes were important for the participants, as the strategic plan is an authoritative text that legitimates courses of action. Similar to extract 4 on commercializing research in section one of the results, these meeting delegates expressed concerns about the anticipated strategic direction that Unico's research would only focus on '*a small number of key areas*' (Version 3). While delegate A expressed concern without drawing upon a concrete example, delegate B revealed reasons for concern, especially in line B9, by recontextualizing the text in relationship to his/her own research which may not be considered a key area and would thus imply a marginal role in Unico's research portfolio. By recontextualizing the text in ways that allowed them to imbue it with meaning from their own areas of research, which might otherwise be neglected, participants could ensure that the strategy text included sufficient interpretative flexibility to cover their own research and, hence, imply that Unico would continue to support and provide resources to these areas. We can thus see how the specific content of Unico's planning text was shaped by individuals' intentions, as they were articulated in talk. The text thus, progressively, incorporates more of the meanings that are articulated during talk episodes, so coming to better represent a collective meaning platform for participants over time. This agreed terminology arising from talk, which characterized successive versions of the text, is important in understanding how the text gains authority. While the plan appears in decontextualized form, its terminology implicitly reflects the contextual nuances in which the talk occurred and upon which textual changes were based. Our findings showed that the plan's content was changed, as individuals across Unico expressed their own contextual relationships to the text and their preferred meanings and intentions during the various talk episodes represented by strategy meetings. As the Deputy Leader noted '*[t]here was clearly a lot of concern about some of the terminology that we were using…*'. Changes to Unico's strategic plan thus arose from serial recontextualizations, resulting in a terminology that was contributed to and agreed upon by the multiple participants in the planning text production cycle. The production cycle provided the platform to amend the plan's content to reflect this agreed terminology and its assumptions of shared meaning; '*to make sure that at the senior level across the heads and you know, the top level of the school, the top level of … we have a reasonably common understanding of what we mean by some of the phrases*' (VC). As time progressed, the plan was seen to reflect formulations that were commonly understood across Unico.

While the plan reflected terminology based on individuals' recontextualizations, these assumptions of agreed terminology also enabled the plan to become fixated over the duration of Unico's strategic plan production cycle. Fixation occurs as talk becomes manifested in written form. As the meaning that was conveyed in talk becomes decontextualized, the fixated words in the strategic plan gained increasing authority because of the assumption that it was jointly constructed; '*there's been a genuine and a successful attempt I think to engage as many people as possible in the discussions that have led to the production of the strategy*' (Deputy Secretary). While the nature of a strategic plan provides the document with the capacity to gain authority (Cooren, 2004), we have seen that it is the recursive process of its production that gives authoritativeness and commitment to its content. That is, the textual agency of the strategic plan is enhanced by the assumptions that the text incorporates shared meaning arising from multiple episodes of talk embedded in contextual nuances which reflect each stage of the strategic plan production process. Our next example shall further illustrate how these assumptions enhance a text's authoritativeness and agency.

Implications for the strategic plan production cycle over time

In order to illustrate how the recursive text–talk relationship shaped the plan's production cycle, we draw upon an example from the final period. At this stage, Unico's planning text had gone through several iterations over the previous four periods, resulting in multiple content changes. This example from the top management team meeting provided a final opportunity to discuss whether last tweaks should be made to the plan. In this extract, Departmental Head C suggested another textual amendment to the Teaching Mission of Unico's strategic plan. At this point, the Teaching Mission was expressed in eight bullet points that stated a part of Unico's overall strategic direction.

Extract 6

1	Departmental Head C:	Last time we also mentioned the growth through partnership
2		didn't we? And I read it and I didn't …
3	VC:	Some really specific suggestions would help at this stage, you know, some
4		ideas of what words should be in there.
5	Departmental Head C:	Organic growth through partnership with both international and
6		national, regional, whatever.
7	VC:	And then you know, how do you measure that, what do you mean by it? I mean
8		we've actually been going through taking out some of the slightly wishy-washy
9		words because there were a lot of words that didn't mean anything but had lots
10		of buzzwords in.
11	Departmental Head C:	Well I guess growth to us is quite important and if we're going to
12		grow, we have to have a strategy how we're going to grow.

[VC only makes only a sound of 'mmmmh' followed by 10 seconds of silence until another team member posed a question. However, the VC did not comment further on Departmental Head C's suggestion.]

In this example, Departmental Head C did not recontextualize a specific item in the planning text but rather referred generically to a whole section of the plan. This triggered the VC to ask 'what words should be in there [Unico's strategic plan]' (line 4). In response to the VC's comment, Departmental Head C tries to work out a specific proposition (lines 5 to 6). However, the VC countered again Departmental Head C's suggestion (line 7) by asking 'how do you measure that, what do you mean by it?'. While Departmental Head C responded to the latter part of the VC's question explaining that 'I guess growth to us is quite important', the first part of the VC's comment about measurement was not addressed. The VC's question about measuring was triggered by the previous planning period's guiding question which had focused on how Unico could measure specific actions, and had already resulted in amendments to the strategic plan. As Departmental Head C could not provide an immediate answer, the VC blocked the suggestion, and it did not lead to a content change in Unico's strategic plan.

Talk illustrated in this last extract illustrates that the opportunity for talk to trigger a textual change in Unico's strategic plan became harder during the last stage of the strategic plan production cycle. As the planning text's content became more fixated over time, it seems that individuals needed to specifically recontextualize what particular textual item they would like to amend and to articulate the envisaged textual change very precisely. During the planning text's production cycle, changes to Unico's strategic plan occurred in light of multiple individuals' recontextualizations,

Table 2. Recontextualization and decontextualization

Recontextualization	For recontextualization to occur, a text needs to be actualized by an individual in his/her talk. An individual thereby reveals his/her interpretation of the text, which is based on the current situational and contextual characteristics.
Decontextualization	Talk becomes materialized in written text. Thereby, the meaning of a verbal statement is detached from the speaker's mental intentions. Additionally, the text expresses meaning without reference to the situation and context during which the talk occurred. Text thus becomes an atemporal object.

which ultimately led to precise formulations that were agreed among participants in previous periods (see VC in lines 8 to 10). As these amendments were reflected in each new version of the document, talk that recontextualized the strategic plan inevitably became more precise about Unico's strategic direction. Therefore, the planning text became increasingly fixated and exercised greater authority over talk throughout the duration of the strategic plan production cycle. This authoritativeness was built up throughout each stage of the production cycle through the commitment and energy invested by participants in the process and its resultant document. Each stage strengthened the embedding of the plan within the context of its production, increasing its legitimacy as the recursive process of recontextualization and decontextualization brought together the talk in which the text was constructed and the way that that text was perceived to represent the talk. By the final period, the text had become so fixated that it was difficult for talk to construct changes to the text because the text was assumed to already represent a consensus of preceding talk that made it a more authoritative document. Hence, talk and text have a recursive, mutually constructive relationship, in which the strategic plan as an authoritative text is both a medium and also an outcome of the communication process.

Discussion

Before we outline our discussion, let us recap the starting point of our paper. Based on the foundations of the Montréal School of organizational communication (Cooren & Taylor, 1997; Robichaud et al., 2004; Taylor et al., 1996), we conceptualized strategic planning activities as constituted within a communicative process. We then drew upon one of its founding philosophers, Paul Ricoeur, and differentiated between talk (spoken discourse) and text (written discourse). A communicative process thus consists of an interpenetration of talk and text in which the evolving text may have organizing effects (Cooren, 2004). Our conceptual framework provided theoretical grounding for our first, exploratory research question: *how is a strategic plan constructed as a communicative process?* In order to explain further the implications of a communication approach, we then developed a second, explanatory research question which looked at *what are the implications of this communication process for (i) the plan, (ii) the plan's production process?* In answering these two questions, we drew upon talk extracts from various periods within Unico's strategic plan production cycle.

Our analysis offers an alternative perspective on how strategic planning occurs. We view strategic planning activities as constituted through an interpenetration of talk and text, which construct the final strategic plan. In order to explain this interplay in detail, we drew upon the two Ricoeurian (1981) concepts of recontextualization and decontextualization (see Table 2). As we have seen, Unico's strategic plan provided the basis for discussion during the planning text production cycle.

Figure 1. Recursive talk and text relation

Recontextualization situates the talk in a current context. When recontextualizing, an individual, such as the Finance Director, actualizes the plan in relation to the current situation and his/her background and position. For example, in Extract 4, we saw that the Finance Director advocated a push towards increasing commercialization of research. Academic constituents counter-argued for the freedom to conduct blue skies research which may or may not bring in commercial income in the near future. On the basis of discussions, the plan was subsequently amended. However, such changes appear in decontextualized form. While a new version of the plan reflects individuals' comments, it inscribes meaning which is detached from the situation in which it originated. Individuals' ideas become fixated, though distanciated from the original situation of their occurrence (Ricoeur, 1981). Thus, in each version of the amended strategic plan, the original speakers and their intentions cannot be traced. We therefore propose Figure 1, which illustrates the recontextualization of any item of planning text during a particular episode of planning talk, and then its decontextualized fixation as an altered item of planning text that can cross time, space and actors, as the basic triadic unit of the communication process through which strategic plans are constructed.

This distinction between talk and text established a conceptual basis for illustrating the dynamics of textual agency (Cooren, 2004) – in our case, the agency afforded by and also contained within a written document, the strategic plan, and its implications for the planning text production cycle. Our findings illustrated that Unico's plan disciplined both the flow and content of talk. This became evident as agendas were set mirroring the sequence of the plan. For instance, discussions at a planning meeting in period 3 complied to the order of the plan, as shown in extracts 1 to 3. The plan thus disciplined when certain aspects, such as mission statements, were discussed during a meeting and set the boundaries within which conversations occurred. The nature of the plan as a communicative process, outlining an organization's future directions in the form of missions and strategic objectives (Ackoff, 1970), focuses on 'strategy talk' as opposed to other types of talk. A formal strategic planning process thus, through the communicative interactions that occur, provides the plan itself with authority, as it is seen as being constructed through strategy talk.

The plan, as a textual document, not only disciplined talk but also, as illustrated in extract 4, gave agency to individuals as they recontextualized the plan's content, enabling them to direct attention to specific strategic issues and shape the subject of talk according to their own relationship with the content of the plan (Kuhn, 2008). As an authoritative text, constructed within a formal planning process, Unico's plan particularly afforded agency to those actors who had formal roles

or authority within strategy meetings to acknowledge and legitimize aspects of the talk. For example, the planning text *producers*, being the VC and Deputy Leader, recontextualized the plan to reinforce their position as strategists during a meeting, by moving on discussions (see extracts 1 and 3) and by legitimizing or de-legitimizing particular textual changes, such as in extract 6, where the VC did not acknowledge Department Head C's suggested amendment. Of course, consistent with the plurivocity of talk and the multiple interpretations of text, such authority to support the existing text was derived from the communicative process itself in which continuous recontextualizations reified the plan's authority.

It is important to understand the recursive talk–text dynamics over multiple cycles, through which the plan derives its authority. Over the course of the planning process, the amended versions of the plan as a text became increasingly authoritative and so legitimated particular courses of action (Jarzabkowski, 2005; Kuhn, 2008). While the strategic planning context provides a plan with the capacity to become authoritative, it was the recursive process of talk and text that gave Unico's strategic plan authoritativeness, as each version of the plan had absorbed those contextual nuances that reflected each stage of the plan production cycle. As the text increased in authority over successive cycles of textual amendment, so its content became more fixated. Hence, the plan became less subject to change, particularly in the last stage of the production cycle, as its parameters were already seen to convey agreed strategic directions. As illustrated in Figure 2, the relationship between talk and text became more interpenetrated, with talk confirming text and text supporting talk, over successive cycles as the plan was considered to reflect agreed terminology. Presumptions of agreement resulted from the various opportunities of top management team members and other members within Unico to articulate views on the plan's content. Our findings illustrated that individuals held multiple, even competing interpretations of a particular item of the plan's content (see extract 4) or buzzwords which were meaningless to participants in the plan's production cycle (see extract 6 for the VC's comment in line 8 to 10). In order to bridge interpretations and to resolve potential difficulties in recontextualizing, the strategic plan was amended in light of individuals' intentions. At later stages of the production cycle, in particular period 5, it was more difficult for participants to trigger content changes, as the plan was already considered to carry meaningful statements that provided legitimate courses of action constituting Unico's strategic direction. Hence, we are able to show the implications of the communicative process for the plan and the strategic plan production cycle. Over the duration of a communicative process, a plan will become more authoritative as elements of the text become increasingly fixated and distanciated from the discussions in which changes to the text took place. Thus, successive cycles of decontextualization are associated with the production of an increasingly authoritative text. Figure 2 illustrates these recursive dynamics through which a text draws authority from talk, even as the text also affords agency to those actors who enact it. Thus, as shown in Figure 2, in each episode of text and talk the relationship between the two draws closer, illustrating their recursive interpenetration, until the final text is presumed to reflect both the process and the outcome of the talk in which it was constructed.

Our analysis highlighted additional issues of power and participation. Specifically, we illustrate that an organization's power structures are reinforced through a plan production cycle. Power is implicit in the communicative processes of constructing a strategic plan in two ways. First, power is evidenced in the role of being a text producer, such as the VC or Deputy Leader, who, as top management team members, and 'strategists', are the only individuals who are authorized to make the actual content amendments in the planning document (decontextualization). While they were also participants in the text production cycle and so took part in recontextualizing cycles, these individuals were able to exercise the power of their position over what content would be amended
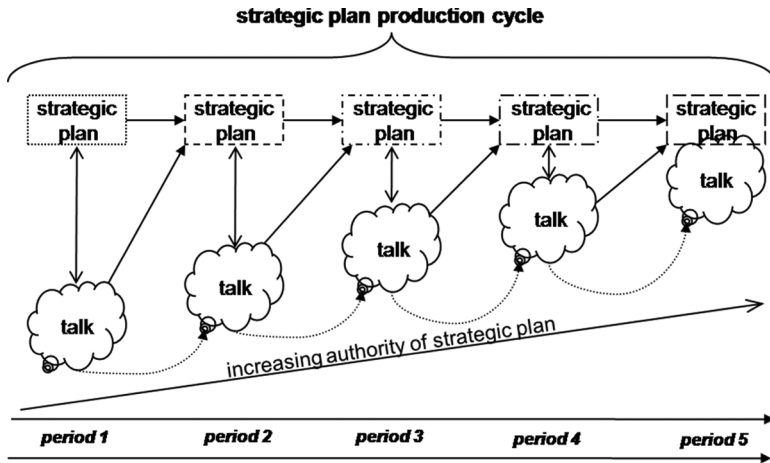
Figure 2. Recursive process of recontextualization and decontextualization

and what form that amendment would take. Thus, we suggest that individuals who hold such a dominant position in an organization control the plan's content in that they are able to decide upon which comments will be materialized in a new version of the strategic plan. Owing to the scope of the communicative process, these text producers cannot control all the talk that takes place. Furthermore, they may have a genuine intention to gather views and increase commitment to the strategic plan by ensuring that it is widely communicated and altered in interaction with multiple participants. However, as the plan became increasingly fixated, so the role of the text producers also shifted during the production cycle. In the earlier phases of the planning text's production process, as seen in the extracts from Period 2 (extract 5) and Period 3 (extract 4), their role was to amend the plan's content so that it better reflected individuals' recontextualizations. However, by the last stage of the plan's production period, text producers protected the agreed version of the planning text in order to conserve the meaning that had arisen from multiple cycles of recontextualization and decontextualization. As the text became more fixated, so the text producers, as its custodians, also protected its fixation, illustrating the way that an authoritative text is representative of and implicated in the authoritative power structure within an organization.

Second, while the planning text's production cycle did represent widespread consultations with constituent members of the University, the process also constrained participation to only a subset of the organization. Even when planning is a communicative process, only those members who are actually present in particular episodes can take part in recontextualization and have any opportunity to shape the text. Hence, we suggest that the strategic plan production cycle occurs in a layered process that inscribes power relationships within the University. While the planning text producers, at the inner core of the University hierarchy, controlled the actual content changes, participation in the production cycle and thus recontextualization also contributed to content change and were restricted to those who were able to voice their interpretations of Unico's strategic plan during the production cycle. Thus, planning activities reinforce social orders and political relationships by constituting opportunities for participation and agreement on the plan's content. The communicative process serves not only to generate a plan that is assumed to represent an agreed set of meanings from across the University but it also serves to embed and reinforce the power structures of the University in terms of who is able to contribute to strategy.

Based on our analysis, we propose that strategic planning activities come in to being through an increasing interpenetration of talk and text (see Figure 2). The recursive cycle of recontextualization and decontextualization shaped both the input of different individuals to the plan that is produced and the content of the plan itself. We suggest that a strategic plan's production cycle provides a platform for meaning-making among participants which bridges the multiple, often competing, interpretations of the plan's content. The notions of recontextualization and decontextualization demonstrate that the strategic plan can be amended in light of individuals' interpretations in order to resolve potential difficulties in recontextualizing. However, the more that the plan is assumed to bridge multiple interpretations, also the more fixated it will become, and so less open to new interpretations. We illustrate this cycle and the increasingly authoritative nature of the text in Figure 2, which takes our basic triadic unit of communication and illustrates its implications for the plan and the planning text production cycle over time.

Implications and Conclusions

Despite debates about the efficacy of strategic planning (Glaister & Falshaw, 1999; Mintzberg, 1994; Mintzberg et al., 1998) and propositions that communication is a key purpose of planning (Grant, 2003; Ketokivi & Castañer, 2004; Mintzberg, 1994), there are few studies of how strategic planning actually occurs or how it has communicative effects. In order to reveal the micro-activities that constitute strategic planning (Johnson et al., 2003, 2007; Jarzabkowski, 2005; Whittington, 2006; Whittington & Cailluet, 2008), we drew upon a theory of organization as communication (Cooren & Taylor, 1997; Robichaud et al., 2004; Taylor et al., 1996). In illustrating the dynamics of strategic planning as a communicative process, our study makes contributions to two main bodies of literature: (i) the strategic planning literature and (ii) the Montréal School of organizational communication.

First, we offer an alternative view on strategic planning. We conceptualized strategic planning as being constituted through a communicative process, consisting of an increasing interpenetration of talk and text (see Figure 2) that leads to the creation of a final strategic plan. We demonstrated that the planning text both shapes planning activities and at the same time is shaped by these very same activities. Our study showed that a strategic plan is not a static document promoting inflexibility as claimed by Mintzberg et al. (1998), but rather that it is dynamic and has organizing effects on workplace interactions. The strategic plan is thus an organizing device for embedding social order during strategic planning activities. This offers an alternative view on strategic planning as a communication process, which currently assumes that the communicative value of a plan is in the way it is disseminated after it has been formulated (Kotter, 1995; Mintzberg, 1994; Mintzberg et al., 1998). Such views overlook how communication occurs, who is involved and the implications of this communication for the strategic plan. Our findings showed that communication is not a process that occurs after the strategic plan has been developed but rather is something that is integral to the planning process itself. This suggests that a further dimension of planning, participation in the planning activities (Mantere & Vaara, 2008), is also part of the communication process. While many individuals participate in the strategic planning activities and are thereby able to raise concerns and suggest amendments to the strategic plan's content, it is only a few who, due to hierarchy and position, are actually able to amend a strategic plan's content. Ultimately, a plan's content may have been influenced by many who participated in the communication process, albeit that its actual text has been constructed by a few key players.

Second, while the institutionalized processes of planning have been derided as divorced from any actual strategy making value (Mintzberg, 1990, 1994; Mintzberg et al., 1998), we suggest that

an institutionalized strategic planning process provides a meaning-making platform to individuals. Such meaning making occurs as participants in the strategic plan production cycle reveal their interpretations of the plan's content while it is under construction. These interpretations result in multiple content amendments which are crucial as they lead to agreed formulations among participants that are then manifested in the final strategic plan. The recursive interplay between planning text and talk thus provide the process that enables the minimization of competing interpretations on the strategic plan's content. While we do not suggest that the plan actually has shared meaning, the communicative process through which it was constructed represents agreement and hence gives the plan legitimacy as an organizational document. Our finding about the increasingly authoritative nature of the text is in part due to participants' and text producers' assumption that the text has been subject to widespread meaning-making and thus inscribes a set of agreed values that imbue it with authority. Hence, we argue that it is the recursive communicative process constituting the strategic plan production cycle that is of significance, rather than the communication of the plan itself (Bartkus et al., 2000; Beer & Eisenstat, 2000; Kotter, 1995; Mintzberg, 1994). Furthermore, our findings indicate reconsideration of the role of strategy documents within strategic planning and strategy making activities. While these are institutionalized processes that may not make actual 'strategy' they are important processes within organizations that need to be better understood.

Our findings also elaborate on the Montréal School of organizational communication. First, we provided novel insights by differentiating between talk (oral discourse) and text (written discourse) which have previously been conflated (Cooren & Taylor, 1997; Robichaud et al., 2004; Taylor et al., 1996). Specifically, we drew upon one of the Montréal School's founding philosophers, Paul Ricoeur (1981), and adopted two of his concepts, recontextualization and decontextualization. Our approach extends current findings on the dialogic of text and agency (Cooren, 2004)/conversation (Robichaud et al., 2004; Taylor et al., 1996). Furthermore, it responds to calls within the communication literature (e.g. Iedema & Wodak, 1999) to better understand how text–talk relationships constitute widespread meanings and social orders. Our analysis provides a framework for analyzing the recursive interplay between talk and text in depth. As strategic planning is concerned with the creation of a plan, which is specifically an item of text (Mintzberg, 1994; Mintzberg et al., 1998), it provided an appropriate context of study. We demonstrated that the strategic plan disciplines talk in that it determines both the occurrence and the subject of talk. At the same time, talk may shape the future content of the strategic plan. As we have seen in the second part of our analysis, interpenetration of text and talk has implications for the plan as well as for the production process itself. Our findings and our process model, Figure 2, provide the basis for future research on the interplay between talk and text in settings in which the inevitable use of a written text may be separated from the talk that constructs that text, as may be found in the formation of policy documents, for example (e.g. Bazerman, 1997).

We also provided data based on a longitudinal study which is rare in communication research (Monge, Farace, Eisenberg, Miller, & White, 1984). Based on Unico's planning activities, we demonstrated how a particular type of text, a strategic plan, was constructed over time through the strategic plan production process. By analyzing cycles of text and talk over different periods, we were able to identify implications of this dialogic for the plan as well as for the process of its production. As time progressed, the recursive relationship between recontextualization and decontextualization resulted in agreed content that was manifested in Unico's final strategic plan. During this period, the plan became fixated and thus increasingly authoritative in articulating Unico's strategic direction. We would like to encourage further work with longitudinal data, which can extend the process model, Figure 2, arising from our study.

Finally, our study revealed notions of power and social order that are constituted within communication processes. In a university setting, different actors have different interests that they bring to the communication process, and these interests have political connotations about relative power and influence (Hardy, 1991; Jarzabkowski, 2008; Mintzberg, 1979). We showed that, while recontextualization opens communication up to participation and the voicing of different interests, decontextualization is an act of power that shapes how talk becomes materialized in text. The authors of the text, whom we termed strategy text producers, even where they may intend to represent the polyvocity of the communication, must make choices that include some nuances of talk and not others. Hence, the ability to exercise authorship provides a dominant position. When this authorship is aligned to organizational status and hierarchy, as in strategic planning, power and politics are further embedded in the communication process. We thus propose that in some contexts, such as strategic planning, decontextualization is a political process that enables the influence of some actors at the expense of others (Hardy & Clegg, 1996), and that this influence is manifested in authoritative documents such as strategy texts. Our analysis thus elaborates upon Cooren's (2004) notion of textual agency, as it shows the dynamics through which text-in-the-making disciplines planning activities and also how the subsequent text affords agency to particular types of actors who participate, or have formal roles in strategic planning. We suggest that our findings may provide the basis for further empirical research into power, social order and the agency of texts, as they are constituted in organizational communication processes.

While this study was conducted in a university context, we expect these findings to be relevant in similar organizational settings with diffuse power structures and democratic decision-making, such as health care (Denis et al., 2006; Dutton, Ashford, O'Neill, & Lawrence, 2001) or other governmental institutions (Davenport & Leitch, 2006). While we focused solely on the development of one type of document, in our case a strategic plan, other research has shown that documents are significant on organizing and sharing meaning across organizational boundaries (Bechky, 2003; Carlile, 2002, 2004).

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Appendix A

Figure 3 illustrates the evolution of Unico's Research Mission across five periods. It demonstrates that changes to the strategic objectives in Unico's Research Mission mainly arose from discussions at meetings in periods 1 and 2. For instance, six changes were made to the first version of Unico's plan after the top management team meeting in period 1. The second period was characterized by a university-wide consultation including Council (4 months). These discussions occurred in relation to five evolving versions of the plan. This was the period during which most changes occurred to the Research Mission's objectives. We selected extract 5 in this paper as an example of the type of changes to a strategic objective arising from strategy meeting talk during this period. As shown, these types of talk were primarily concerned to modify the text in order to better reflect specific academic values about research autonomy, whilst still retaining the commercial and international research objectives of administrative staff. Indeed, despite changes to increase the interpretive flexibility of some research objectives, so accommodating academic concerns, Unico's Research Mission still promoted a focused approach of funding only a few research areas in order to increase Unico's international reputation.

In the third period (2 months), the top management team met to discuss the content of Version 7, which had already integrated many of the comments voiced during period 2. While some discussions were triggered by differing academic and administrative viewpoints amongst top management team members (as seen in extract 4), top management largely supported these changes, as illustrated in the low number of amendments in that period (Figure 3). Their discussions and perceptions that the changes were valid in this version of the plan, helped to confirm to top managers
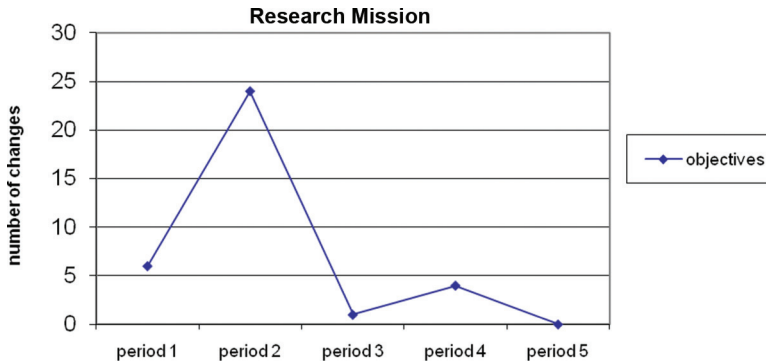
Figure 3. Evolution of Research Mission's objectives

that the communication process was leading to a plan that contained shared meanings developed through participation with the wider university community of academics and administrators. During the fourth period (2 months), four amendments were made to objectives as a result of a three-day strategy away. A selection of Unico's senior managers across academic and non-academic departments was invited to talk about specific actions to achieve the espoused strategic directions. Unico's strategic plan was then finalized and approved during the fifth period (1 month). At this point, strategy meeting talk that suggested further amendments were typically not able to result in a textual change (see extract 6), as the plan was seen to reflect agreed terminology as a result of previous consultations with a wide range of staff.

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A. Paul Spee is a Postdoctoral Research Fellow at The University of Sydney Business School. This paper was accepted during Paul's previous appointment as Lecturer in Strategy at Aston Business School (United Kingdom). His research interest focuses on the role of artefacts, such as strategy tools or strategy documents, within strategy processes. Paul published an essay conceptualising strategy tools as boundary objects in *Strategic Organization* and co-authored a review and future directions for the strategy-as-practice perspective in the *International Journal of Management Reviews*.

Paula Jarzabkowski is a Professor of Strategic Management at Aston Business School and a European Union Marie Curie Fellow. Her research focuses on the social practices of strategy-making, particularly in regulated, professional service and financial risk-taking contexts. She publishes on these topics in a number of leading journals, such as *Academy of Management Journal*, *Journal of Management Studies*, *Organization Science* and *Organization Studies*, as well as publishing the first book on strategy-as-practice, *Strategy as practice: An activity-based approach* (Sage, 2005). In this vein of research, Paula is currently conducting an ESRC/IICI funded comparative video-ethnography of processes for placing high-stakes, high-value reinsurance risks in different international markets and is co-editing a special issue of *Journal of Management Studies* on Strategy as Discourse.