STRATEGISING ORGANISATIONAL CHALLENGES WITH SENSIBLE FOOLISHNESS AND PROCEDURAL RATIONALITY

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Thesis abstract:

For March (2006), prevailing modes of intelligence, supported by technologies of rationality, are often inadequate, misguided and even disastrous when deployed by managers facing complex organisational challenges. March's (1971) concept of sensible foolishness is presented as an approach to combat the dominance of procedural rationality and a means to realise sensible foolishness is through play. Despite this proposition, managers continue to draw upon rational technologies and seek to use these tools in rational and objective ways to yield desired ends. Some research streams (e.g. the tools-in-use paradigm) have begun to challenge the dominant view within materiality studies, which tends to focus on the dichotomy between the correct and incorrect way to use tools. However, we still have a limited understanding of the process surrounding the interplay between sensible foolishness (i.e. play) and procedural rationality (i.e. reason) and how this unfolds in practice. This thesis therefore employs a sociomaterial lens to explore how serious organisational challenges can be navigated through playful means. I conducted this research within the context of three SMEs using a multiple data set comprising interviews, observations and video and audio-recorded episodes of strategy workshops. Three key findings emerged from the data. First, I show how play and reason undergo an evolving fluidity during strategy making sessions, where managers realise unintended process affordances that manifest from this interplay. Second, I show how existing hierarchical structures can be temporarily suspended through playful interaction. Third, I show how physical visuals stemming from play can support the sharing of tacitness during strategy making. Altogether, this thesis unpacks how organisational actors escape their logic of reason and temporarily suspend rational imperatives (March, 1971), offering contributions and insights into how sensible foolishness is actually performed in-practice during strategy making.

Keywords: Strategy-as-practice, play, sensible foolishness, procedural rationality, sociomateriality, process affordances

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List of Abbreviations

PCF: Participant consent form

PIS: Participant information sheet

SAP: Strategy-as-practice

SME: Small and medium sized enterprises

UK: United Kingdom

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CHAPTER 1:

INTRODUCTION

1.1 Introduction to the thesis

Strategy work is serious stuff. It involves high stakes decisions surrounding ambiguous and complex organisational challenges (Burke & Wolf, 2021; Kwon, Clarke, & Wodak, 2014). When these decisions go wrong, organisations can fail, people can lose their jobs, their livelihoods, and the rippling effects are felt by stakeholders and even wider society who also experience the consequences of strategic decisions. Given the devastating consequences that can arise from making strategic decisions, managers and researchers have been interested in how 'better' strategic decisions can be made, so that organisations are more equipped and able to contend with crises and changes (Wickert, Post, Doh, Prescott, & Prencipe, 2021). Hence, when faced with complex organisational challenges, managers turn to props i.e. strategy tools and materials, in the hope that these aids will help guide them through organisational uncertainty, generate viable options (Cabantous & Gond, 2011) and help them make the 'right' strategic decisions. In other words, managers turn to social science and theory for solutions, in the hope that they will be provided with a way forward (Wickert et al., 2021) out of uncertainty. In particular, the purpose of this thesis explores how March's (1971) concept of sensible foolishness can serve as a useful mechanism to aid managers when faced with complex strategic challenges. Importantly, this dissertation uncovers the process of how sensible foolishness unfolds in the context of strategy-workshops.

Studies on strategy tools and materials have thus largely been concerned with how these props and aids can support managers during strategy making (e.g. Jarzabkowski, Spee, & Smets, 2013; Jarzabkowski & Whittington, 2008; Knight, Paroutis, & Heracleous, 2018; Reckwitz, 2002; Whittington, 2007). The challenge with these studies is that they continue to fuel the prevailing perception that strategic decision making is a predominantly rational process (Cabantous & Gond, 2011). To achieve rationality in the decision making process, actors seek to use tools and materials in a logical and correct way at the appropriate time (Rigby & Bilodeau, 2011). The traditional view within materiality studies has therefore focused on the correct way managers can use tools in order to reach desired ends (Chia & Holt, 2023) and ultimately make good decisions for their organisations.

The process of how managers actually engage in strategy making and make strategic decisions falls under the strategy-as-practice research (SAP) agenda. The SAP field is concerned with the doing of strategy (Whittington, 2006) with particular emphasis on who does strategy, what they do and how do they do it (Jarzabkowski & Spee, 2009). Due to the research focus on the actual doing of strategy, SAP scholars zoom in on the micro-interactions between actors and critically explore these interactions in fine detail (Kohtamäki, Whittington, Vaara, & Rabetino, 2022). Such a perspective is vital in understanding how managers engage in strategising and how managers actually use tools and materials in practice. Hence, from a SAP perspective, we can begin to recognise tools and materials as essential components of the strategy making process, rather than being sources of the answer to strategic challenges (Jarzabkowski & Kaplan, 2015).

In line with the materiality turn in organisation studies (Orlikowski & Scott, 2008), SAP research has paid more attention to the role of materials and how materials can support strategy work. This coincides with the tools-in-use paradigm which recognises that tools do not cause managers to make right or wrong decisions but enable them to engage in strategy making (Jarzabkowski & Kaplan, 2015). The rise of the tools-in-use paradigm has therefore begun to challenge the prevailing view within materiality studies that focuses on the correct and incorrect way to use strategy tools. This false dichotomy between the correct and incorrect use of tools may obscure the improvisations that can occur when managers use tools in practice (Jarzabkowski & Kaplan, 2015; Worren, Moore, & Elliott, 2002). By understanding strategy tools as strategy tools-in-use, we can begin to recognise and further explore how managers may improvise with and even misuse tools, where the misuse of tools does not mean managers use tools incorrectly, but rather using tools in a different way than the creator intended the tool to be used (Jarzabkowski & Kaplan, 2015). Tool misuse may even lead to unintended process affordances that manifest during strategy making through interactions between actors (Burke & Wolf, 2021; Gibson, 1977).

How managers improvise and misuse tools is generally less explored within materiality studies. Part of the reason is because of the managerial desire to adopt critical thinking when analysing strategic problems, which has been identified as an essential mode of reasoning (Fisher, 2001). This logical mode of thinking is in accordance with the dominance of procedural rationality, which is the extent to which the decision making process reflects the efforts and intentions to collect and analyse all available information in order to make the best possible decision under the given circumstances (Simon, 1976, 1978). In line with this view, rationality

is often equated with organisational intelligence (Ocasio, Rhee, & Boynton, 2019). The desire to achieve procedural rationality is thus driven by the widespread belief that success in strategy is dependent on the "careful planning" and "reliance on instrumental, means-ends logic of rationality in making decisions" (Chia & Holt, 2023, p. 2). To help make these good decisions in strategy, managers turn to tools and materials to aid them in conducting analysis that foster connected and complex thinking (Wright, Paroutis & Blettner, 2013), which continues to reinforce the prevalence of procedural rationality in the context of strategy making. The dominant and traditional view that procedural rationality equates to organisational intelligence (Ocasio et al., 2019) and that strategy tools can help managers make rational, logical and 'correct' decisions (Rigby & Bilodeau, 2011) is thus deeply embedded into established organisational practices.

Within scholarly research, rationality and rational processes have generally been recognised as being pivotal for strategic decision making (Calabretta, Gemser, & Wijnberg, 2017; Elbanna & Child, 2007). Rationality relates to analytic, systematic and step-by-step mechanisms to reach a conclusion (Elbanna, 2006; Hodgkinson & Healey, 2011). In fact, when managers are faced with more important decisions, they feel compelled to demonstrate rationality in their decision making processes (Elbanna & Child, 2007; Hickson, Butler, Cray, Mallory, & WIlson, 1986). Some studies have also found a generally positive relationship between rationality and effectiveness in strategic decision making (Dean Jr & Sharfman, 1993). Despite the widespread view of rationality being a necessary requirement for managers when making important decisions, the issue with procedural rationality is that it often performs poorly in complex and ambiguous strategy scenarios (March, 2006) and it can confine managers pursuing ends that are in line with prevailing ideas and practices. The endeavour for managers to seek out tools in the hope that they can offer guidance in increasingly ambiguous situations can, according to March (2006), lead to huge mistakes and disastrous outcomes. Departing from rationality during times of serious decision making in strategy thus remains largely underexplored within the SAP research agenda. Critically, little is known about *how* managers depart from these prevailing norms as managers feel obligated to make significant decisions with logical and analytical processes. However, some research areas have begun to unpack strategy making that begins to diverge from these rational norms.

Research streams within SAP have started to hint towards the limitations presented by the rational-deliberate perspective, which underappreciates and perhaps even rejects other modes of exploration that do not assume action must serve pre-defined goals and correctly

apply rational procedures (March, 1971). For example, the tools-in-use paradigm emphasises the various affordances of tools that managers use improvisationally to make sense of issues that may or may not arise from the 'correct' or intended use of tools (Jarzabkowski & Kaplan, 2015). Studies have also shown how creating strategy tools de novo prompts strategy-making to unfold in unexpected directions (Burke & Wolf, 2021). These studies align with Chia and Holt's (2009, p. 164) dwelling worldview and the notion of strategy as wayfinding, where strategy making emerges through "knowing as we go" rather than navigating through strategic terrain to reach a pre-determined destination. Drawing on these approaches when engaging in strategy making is becoming an important theme in practice scholarship as SAP studies are beginning to go beyond rational means of strategic decision making and towards seemingly 'irrational' means.

Despite research on wayfinding (Chia & Holt, 2009) and tools-in-use (Jarzabkowski & Kaplan, 2015) beginning to challenge the view that strategy is an intendedly rational process where managers need to make logical decision in order to meet pre-defined goals, we still know little about how managers diverge from these established practices. Hence, this thesis builds on March's (1971, 1999, 2006) work on sensible foolishness, which holds significant promise to enable managers to temporarily suspend rational modes of thinking and escape their logic of reason (March, 1971). Yet, despite the potential held by sensible foolishness, research has still yet to uncover the process of how managers temporarily suspend rational imperatives and depart from embedded organisational practices. While the notion of sensible foolishness has generally received praise from scholars (e.g. Larsen, 2020), how organisational actors actually do sensible foolishness in practice, alongside rational modes of thinking remains an understudied and undertheorised research area. Research thus tends to continue to consider the 'usefulness' of materials and the extent to which they can help managers easily communicate with each other and to support them in reaching a conclusion (Wright et al., 2013). Such studies continue to follow the rational-deliberate perspective (Pavićević & Keil, 2021) of strategy that looks towards the effectiveness of material use in strategy making that enable managers to reach pre-determined goals.

March (1971) emphasises how individuals and organisations need to be supported in finding ways to experiment and do things for no good reason and he proposes sensible foolishness as way to for managers to do without immediate purpose. Sensible foolishness is a mechanism that facilitates the discovery of new goals by supporting managers as they temporarily escape the logic of reasoning (March, 1971). Hence, sensible foolishness, as

proposed by March (1971), is an alternative to procedural rationality. For Ocasio et al. (2019) organisations pursuing intelligence should balance both sensible foolishness and procedural rationality (Ocasio et al., 2019) as sensible foolishness is not intended to supplant but rather complement rational thinking. In March's (1971, 1999) work, he emphasised how individuals and organisations need to be supported in ways to experiment and do things for no good reason and proposes playfulness as an approach to realise sensible foolishness that enables actors to do without thinking; a purposeful purposelessness. For March (1971), playfulness is the deliberate and temporary relaxation of rules that enable the exploration of alternate possibilities and for actors to behave irrationally and foolishly for a transient time. Thus, according to March's work, play holds the potential to serve as a valuable mechanism to aid organisations.

The concept of bringing play into strategy-making sessions is however not a new phenomenon and has already been explored in serious play studies. Serious play is widely recognised as the deliberate pursuit of playful and fun activities to achieve serious goals or objectives (Statler, Heracleous, & Jacobs, 2011). In other words, serious play is goal-oriented and pursued with particular ends to reach (Statler et al., 2011). Yet, serious play studies tend to focus on the outcomes from the endeavour and the beneficial results for managers, which they can take back to their organisations. For example, enhanced capacity for imagination and creativity as well as facilitating dialogue (Roos & Victor, 2018; Roos, Victor, & Statler, 2004; Statler, Roos, & Victor, 2009) are some of the identified benefits of actors engaging in serious play. While the practical benefits for practitioners from bringing play into strategy is important, a theoretical understanding of the interplay between play and reason in strategy making remains a blurry area in both serious play and SAP research. In particular, the micro-practices and interactions involved in practicing both play and rational decision making remains largely unexplored (Ocasio et al., 2019). This is an important research agenda as building on the work of March (1971), sensible foolishness (i.e. play) as well as procedural rationality (i.e. reason) are necessary to navigate complex and ambiguous strategic issues (Ocasio et al., 2019).

Materials (namely Lego pieces) proved central to serious play studies as these materials helped boost creativity and imagination among managers. Prevailing SAP literature has shown how the use of materials contributes to strategy work, such as the use of photos, maps and spreadsheets in reinsurance (Jarzabkowski et al., 2013). While materiality is widely regarded as being an important component for SAP research, empirical studies on the topic are rare (Werle & Seidl, 2015) with only a few studies paying close attention to the non-discursive

(Jarzabkowski, Seidl, & Balogun, 2022) and material aspects of strategy. SAP studies that do focus on materiality tend to favour the more conventional stuff of strategy e.g. PowerPoint slides (Kaplan, 2011; Knight et al., 2018), which align with prevailing norms and practices. Moreover, materiality studies also tend to disregard those innately playful materials e.g. Play Doh and toys (Huang, Wright, & Middleton, 2022), which rarely make their way into managerial offices and scholarly research (with the exception of some serious play studies). As a result, we know less about how materiality creates opportunities for play in strategy and what this can lead to. Recent studies have also called for research to dive deeper into the role of different materialities (Boutinot & Delacour, 2022) and for ethnographers to carefully observe and track the unfolding sociomaterial dynamics using video-recording approaches (Dameron, Lê, & LeBaron, 2015).

For March (1971), sensible foolishness is a valuable and liberating means to explore alternative rules, discover more interesting goals and escape our logic of reason. However, we still know little about how actors can deploy sensible foolishness in practice when faced with complex strategic issues that technologies of rationality and generic strategy tools fail to address (Burke & Wolf, 2021). This remains a fundamental puzzle within the SAP research agenda regarding how practitioners can engender foolish interactions within serious, high-stakes strategy making sessions. While serious play studies have begun to touch upon the associated benefits of bringing play into strategy work the tensions, conflicts and pressures from the interplay between sensible foolishness and procedural rationality has received much less scholarly attention.

Studies on play come from various backgrounds including philosophy, sociology and psychology (Statler et al., 2011), with each discipline offering varying definitions of what constitutes play. However, what is recurrent within the literature on play is that it is an activity that is freely pursued with only intrinsic motivators (Csikszentmihalyi, 1975) and individuals seek to experience pleasure and joy from engaging in play (Piaget, 2013; Van Vleet & Feeney, 2015). Play has also been characterised as being pursued without immediate purpose (Rubin, Fein, & Vandenberg, 1983), in other words, play is a pleasure-directed activity rather than being goal-directed. This orientation of play aligns with March's (1971) sensible foolishness and presents significant promise for the future of SAP research. Yet, the interplay between the two practices of play and procedural rationality remains underexplored, with little theoretical understanding of how the two practices unfold in the context of strategy making and the process affordances (Burke & Wolf, 2021; Gibson, 1977) that arise from their interaction.

Building on March's (1971) technology of foolishness, this thesis explores an alternative means of how managers can engage and strategise complex organisational challenges using materials that may be characterised as 'carriers of foolishness' rather than 'carriers of rationality' (Cabantous, Gond, & Johnson-Cramer, 2010). Objects and artefacts provide scope to shape understandings and perceptions (Foucault, 1998; Zilber, 2011), where artefacts can create opportunities for actors in multifaceted ways (D'Adderio, 2011). Applying these materials with capacity to serve as carriers of foolishness in serious strategy making settings may lend itself to the opening up of novel discussions and insights for example, by facilitating an immersive sensory experience that can act as a sociomaterial springboard for discussions in strategising (Burke & Wolf, 2021). Bringing those innately playful materials (Huang et al., 2022) into strategy-making may thus pave the way for managers to adopt non-rational approaches in strategy, which can lead to new discoveries through the interplay between sensible foolishness and procedural rationality.

This thesis positions March's sensible foolishness as a promising middle ground between intentional (building) rational strategic action on the one hand, and unintentional (dwelling) emergent strategic action on the other (Chia, 2017; Chia & Holt, 2006). According to March (1971), sensible foolishness holds the potential to be intentionally unintentional for a given period of time. Despite the promise held by March's propositions and the value sensible foolishness (and play) hold for strategising, such behaviour and interactions rarely attract scholarly attention in organisational studies (Alvesson & Spicer, 2012; Karimi-Ghartemani, Khani, & Nasr Isfahani, 2022). This may be because 'foolish' behaviour challenges the "triumph of procedural rationality" (Ocasio et al., 2019, p. 237) and because of this, play continues to remain on the frontiers of organisation studies and maintains a "visitor's status in management and organization studies" (Hjorth, Strati, Drakopoulou Dodd, & Weik, 2018, p. 156).

In order to understand the value of sensible foolishness in strategising, it is important to unpack how the different practices of play and reason dynamically interact during strategy making. In their review of March's work, Ocasio et al. (2019) identify how both procedural rationality and sensible foolishness are necessary for managers to pursue organisational intelligence. Yet, despite the general recognition and praise for March's work, we know surprisingly little about the interplay between the two practices. Indeed, practice scholars tend to overlook this crucial interplay in the context of where strategy work takes place such as in

meetings, workshops and off-site retreats where strategy-making occurs (Seidl & Guerard, 2015). This remains a fundamental yet unanswered puzzle in practice scholarship, which this thesis aims to address.

Uncovering how practices of play and reason interact and unfold in the context of strategy making is important for two key reasons. First, it speaks directly to March's call for how sensible foolishness can allow managers to "temporarily suspend the operation of the system of reasoned intelligence" (1971, p. 263) and "escape the logic of [their] reason" (1971, p. 261). The temporary suspension from rational imperatives, for March, can enable the discovery of new and better goals, explore new possibilities and to experiment and invite behaviour and action that does not necessarily conform with the norms of behaviour associated with rational decision making. The question of *how* managers actually doing strategy-making can (temporarily) escape their logic of reason and engender the benefits from sensible foolishness is still to be unpacked in practice scholarship. This thesis advances our existing understanding of how play and reason unfold in strategy-making sessions (Seidl & Guerard, 2015). A practice lens allows us to zoom in on the sociomaterial interactions between practitioners, which has been typically overlooked in serious play studies that incorporate the role of play into strategy. Scholarly research has recognised March's contribution and the potential value of foolishness e.g. through embodied metaphors (Heracleous & Jacobs, 2008), humorous interactions (Lê & Bednarek, 2017) and positive emotions (Liu & Maitlis, 2014) and some studies (e.g. serious play) have shed light on the value of play in strategy making. However, research is yet to capture the enabling and constraining forces for sensible foolishness and theorise the dynamic interplay between play and reason, which are central to the pursuit of organisational intelligence (Ocasio et al., 2019). This thesis thus takes an alternate analytical approach to serious play studies and contributes to SAP scholarship by unpacking the dynamic interplay between sensible foolishness and procedural rationality from a practice perspective that deeply considers the sociomaterial interactions and manifestations that emerge.

Second, this thesis addresses the consequentiality (Jarzabkowski, Kavas, & Krull, 2021) of bringing play into strategy work. Serious play studies have already shown how interaction with Lego bricks can support scenario development (Jacobs & Statler, 2006) and create rich imagery from strategy content (Bürgi, Jacobs, & Roos, 2005), for example. These studies have largely been outcome focused, with researchers paying close attention to the results from serious play and what was achieved from the serious play workshops. By contrast, know much

less about the value that is generated in-situ from the interaction between play and reason and how value can at times be unexpected and how redundant practices and ideas may transform into fruitful contributions through spin-off strategising (Burke & Wolf, 2021). We also know little about how ideas generated from the interplay between play and reason find their way back into the organisation and (any) resulting impact on wider organisational strategy and/or practices.

Moreover, the tensions and 'dark-side' to bringing play into strategy work has seldom received in-depth research attention as even though pleasure and enjoyment are desired sentiments from play (Piaget, 2013), they are not guaranteed, thus giving rise to potential conflict and tensions, which may emerge. Uncovering how practitioners manage competing forces of play and reason alongside pleasure and conflict during strategy-making and ultimately how this transcends back to organisations remains widely unaddressed within existing literature. This thesis also unpacks how the interplay between play and reason can help overcome hierarchical structures within organisations and bring organisational members to the same hierarchical level. Additionally, this thesis explores how the combination of the two seemingly contradictory practices can support communication and sharing of ideas during strategy-making sessions. In sum, contributions from this thesis extend beyond the unpacking of the interplay between play and reason and show how the combination of sensible foolishness and procedural rationality in strategy making is consequential for organisations in terms of strategic inclusion (e.g. Hautz, Seidl, & Whittington, 2017; Langenmayr, Seidl, & Splitter, 2024; Splitter, Seidl, & Whittington, 2024) and the sharing of tacitness and resolving of ambiguity (Polanyi, 1966; Pyrko, Dörfler, & Eden, 2017).

Overall, this introduction chapter has pointed towards the criticality of understanding the process of how managers escape their logic of reason and temporarily suspend rational imperatives. While March's (1971, 1999, 2006) work has generally been accepted and praised by scholars (e.g. Larsen, 2020), empirical studies that unpack the process of how sensible foolishness alongside procedural rationality unfold in the context of strategy making is largely an untouched area within research. Furthermore, March's (1971, 1999, 2006) work relates to the organisational level and research that does consider March's technology of foolishness or sensible foolishness considers his concepts in broad organisational terms (e.g. Ocasio et al., 2019) or individual leadership terms (e.g. Fernández Fernández, 2022; Thaning, Zundel, Holt, Contu, & Vince, 2020). In this thesis, I deliberately focus on how managers actually do sensible foolishness *in-practice*, which offers three main contributions to knowledge. The contributions

stem from the primary research question. I will detail in my methodology chapter the emergence of two supporting research questions that emerged during the data analysis process, which complement the primary research question below.

How does the interplay between play and procedural rationality unfold in strategy workshops and help actors navigate strategic challenges?

As part of this thesis, I aim to offer three key contributions that extend our understanding of how managers can escape their logic of reason and temporarily suspend rational imperatives (March, 1971) and the possibilities that arise from doing so. First, I illustrate the interplay between sensible foolishness and procedural rationality and how managers oscillate between these two seemingly opposing practices to generate novel unintended process affordances. I show that actors escape their logic of reason through a process of evolving fluidity and how actors transition from the uncomfortable, intentional pursuit of sensible foolishness towards an unintentional comfort. From realising the pleasure that can come from play, actors also recognise the value that manifests in the form of shared interactions and experiences, rather than solely seeing value in the form of outcomes of strategic plans. Second, I show how play in strategy can enable organisational members to dissolve existing power dynamics for a transient time and to temporarily disregard hierarchical structures. I will also showcase how existing power structures can be mitigated through play to enable wider participation in strategy making. Third, I extend our understanding of visualisation in strategy by zooming in on how physical and tangible visuals can support the sharing of tacitness, that is those topics that people struggle to convey with spoken words alone, which can include feelings, ideas and even thorny topics (Knight et al., 2018).

1.2 Structure of thesis

This thesis is structured into seven chapters and it focuses on the interplay between sensible foolishness (play) and procedural rationality (reason) and how managers engage in the two seemingly competing practices during strategy making and the possibilities that arise from this interplay. Chapter 2 provides an extensive literature review, which is split into two halves. The first half of this chapter reviews prevailing research within SAP that covers four key areas. The chapter begins by detailing what we already know from existing SAP studies, highlighting areas that have appeared to be overlooked. Second, the chapter zooms in on the role of strategy-making taking place within the context of workshops (Seidl & Guerard, 2015) and

how these settings act as liminal spaces (Sturdy, Schwarz, & Spicer, 2006). Third, literature within the field of open strategy (e.g. Brielmaier & Friesl, 2023; Hautz et al., 2017; Langenmayr et al., 2024) is reviewed with particular focus on achieving wider participation and inclusion within strategy making. Fourth, the limitations and shortcomings from the dominant rational-deliberate perspective (Cabantous & Gond, 2011; March, 2006) within the prevailing SAP studies are reviewed. Here, the chapter introduces the concept of play and March's (1971) idea of sensible foolishness as a promising mechanism to help counter the shortcomings presented earlier in this chapter. The second half of the literature review chapter is centred on play and how play can offer a potential solution to the challenges facing SAP scholarship. The first section provides a detailed review of the origins of play and what play actually is. Second, the different perspectives of play (e.g. Piaget, 2013; Sutton-Smith, 1997; Vygotsky & Cole, 1978) are presented and how these perspectives hold the potential to advance the challenges presented earlier in the chapter. Third, this section introduces March's (1971, 1999, 2006) work on sensible foolishness and how the concept of play is still undertheorised and understudied in research. Fourth, a detailed review of serious play studies is showcased and here, the chapter focuses on the surprisingly limited theoretical role of play in these studies. This section underlines the importance of bringing play into strategy work and begins to construct a novel theoretical bridge between SAP and March's sensible foolishness.

Chapter 3 presents the research methodology, which is used to answer three research questions. The methodology chapter can be broadly divided into four areas. First, the philosophical orientation is outlined where social constructivism (Berger & Luckmann, 1971; Kukla, 2013) is identified as my positioning for this research project. Second, I detail my research methods, which draw on multiple case studies. As part of this research, there were three participating organisations, all of which are SMEs based in the UK who will be referred to under the pseudonyms of Rubix, Capricorn and Blueberry. Rubix deliver in-person coding and robotics training course for children ages eight to eighteen. Capricorn deliver workshops primarily to young people in schools with the focus to tackle hate crime and extremism. Blueberry deliver training programmes and mentoring schemes for new entrepreneurs. These cases provided a prime setting to explore the unravelling of play and reason in the context of strategy making and how the interplay between the two practices supported practitioners in navigating through their strategic challenges. Research has also called for more in-depth qualitative research to be conducted within SMEs (O'Regan & Ghobadian, 2004). Third, I explain the data collection process and the data sources used as part of this research, which comprise interviews, observations and video and audio-recorded episodes of strategy

workshops. These data sources were collected over a period of eleven months. Fourth, the data analysis process is justified alongside coding figures, which summarise the first order codes, second order themes and aggregate dimensions, which fed into the findings that emerged from the data. The data analysis section also explains the emergence of two further research questions that complement the primary research question.

Chapter 4 answers the primary research question and unpacks the interplay between sensible foolishness and procedural rationality and how the two practices unfold in the context of strategy workshops. The first findings chapter differs to that of serious play studies in two key ways. First, the process by which actors engage in play and reason and the interaction and oscillation between the two practices as strategy-making unfolds is the focal point of exploration. Second, this chapter considers the (unintended) process affordances that emerge from the interplay and how these action possibilities contribute to generative strategising. The video and audio-recorded episodes were vital in unpacking how practitioners oscillated between practices of play and reason during strategy-making as the recordings were able to capture both the micro-interactions between practitioners and the sociomaterial manifestations that emerged from the interplay. This chapter also illuminates the tensions and stresses associated with the injection of play into strategy work. This chapter concludes by presenting a theoretical process model showing the interplay between play and reason, alongside the process affordances that emerged from their interaction.

Chapter 5 addresses one of the emerging research questions and delineates how the interplay between play and reason can begin to level the playing field, where the hierarchical distinctions between managers and wider organisational employees are temporarily suspended. The findings from this chapter culminate in a process model that showcases how existing power dynamics can be suspended for a transient time through play. Moreover, this chapter illustrates how contributions and ideas generated from practitioners within the strategy workshop were translated back into the organisation and disseminated with wider organisational members. This was achieved through the interviews and observations that took place post-workshop.

Chapter 6 speaks to the second emerging research question and showcases how visualisations that emerge through material interaction and the body contribute to communication in strategy-making and specifically the sharing of tacitness, which are those topics that humans find difficult to express and convey using spoken or written discourse

alone. This chapter presents a mechanism for how sharing tacitness can be achieved and the mechanism also illustrates how ambiguity can also be resolved through simplifying ideas and giving them material representation. This chapter brings the focus of strategy towards the material and the body, which have received comparatively less attention within SAP scholarship with practice research typically focusing on the discursive elements of strategy (Jarzabkowski et al., 2022).

Chapter 7 comprises a discussion of the findings presented in chapters 4, 5 and 6 and finishes with concluding remarks. This chapter is composed of four key sections. First, a summary of the findings are presented. Second, the significant theoretical contributions are unpacked in depth and how they advance knowledge of SAP. These contributions detail how the research findings presented advance and also challenge the current understanding of practice scholarship. Third, the methodological and practical implications of this research will be considered. Fourth, the limitations of this research are detailed alongside possible avenues for future research.

CHAPTER 2:

LITERATURE REVIEW

PART I: Strategy-as-practice

2.1 Introduction

This literature review chapter is split into two halves, with the first half considering key studies within the research field of SAP. A critical review of the extant SAP literature is presented and this review will also highlight puzzles and questions that are still yet to be answered. To help shed light on these unknowns, the second half of this chapter will review prevailing literature on play and March's (1971) idea of sensible foolishness. The latter part of this chapter will thus showcase how play and sensible foolishness have the potential to offer novel theoretical contributions when joined with SAP research and how notions of playfulness and purposeful purposelessness can help overcome present shortcomings in our current understanding of SAP. The first half of this chapter will be split into four key sections. First, an extensive review of current SAP research will be presented, highlighting areas that have tended to be overlooked in scholarly research. Second, research on strategy taking place in the context of workshops will be reviewed and the scope of strategy workshops to act as creative spaces and processes of how strategy is shared and communicated. Third, research within the field of open strategy will be considered with particular focus on how organisations achieve wider strategic inclusion. Fourth, the limitations and shortcomings surrounding the rational-deliberate perspective of strategy-making is evaluated and here, I introduce March's (1971, 1999, 2006) work on sensible foolishness and how his ideas show promise to help overcome the identified limitations in current SAP research.

2.2 SAP: What do we already know?

Strategy has long shifted away from being conceptualised as something organisations *have*, to something people *do* (Hambrick, 2004; Jarzabkowski, 2004; Johnson, Langley, Melin, & Whittington, 2007), with particular focus on the managerial abilities of the strategy practitioner (Whittington, 1996) and the day-to-day activities (Jarzabkowski et al., 2022) they engage in to accomplish strategy work. The SAP perspective focuses on the doing of strategy and how strategy work takes place (Jarzabkowski, 2004; Jarzabkowski & Spee, 2009; Johnson et al.,

2007; Vaara & Whittington, 2012). By doing so, the SAP perspective is viewed as humanising organisation and management studies (Pettigrew, Thomas, & Whittington, 2002) by adopting a reflexive approach where scholars are able to constantly reflect on how social practices both enable and constrain strategy work (Vaara & Whittington, 2012). The proliferation of the SAP field catapulted from around 2007 and is now "one of the most prominent and vibrant approaches in strategy research" (Jarzabkowski et al., 2022, p. 1535). One of the key areas that is central to for SAP researchers, is uncovering how strategy unfolds over time, with focus on the actions and interactions between strategists (Jarzabkowski, 2005). In conducting research on SAP, scholars have shifted away from a macro analysis and focused "the strategy research agenda towards the micro" (Johnson, Melin, & Whittington, 2003, p. 14), thereby zooming in on the everyday practices and processes managers draw upon when they engage in the act of strategising (Carter, Clegg, & Kornberger, 2008). The first half of this chapter will be split into seven sections. First, the origins and background of practice theory are discussed. Second, the framework for SAP is detailed. Third, this section will move onto uncovering how (according to existing studies) managers strategise serious and complex organisational challenges using tools and materials. Fourth, the limitations of tools and materials are addressed. Fifth, the affordances of these tools are explored. Sixth, the value of using a sociomaterial lens to study SAP phenomena is considered. Finally, this section concludes with remaining unknowns that this thesis aims to address by bringing play and sensible foolishness into strategy making.

2.2.1 Origins and background of practice theory

For Schultze and Orlikowski (2004, p. 88) the practice perspective "focuses on people's everyday activities". Zooming in on the everyday doings of actors in strategy work coincides with the wider 'practice turn' in social theory (Whittington, Molloy, Mayer, & Smith, 2006). The turn to practice has seen a sharp interest in the 'everyday' (Reckwitz, 2002) doings and activities of actors. Here, practices are an approach to performing a(n everyday) particular task (such as gardening or cooking) that involves routinised forms of behaviour that rely on the body, the mind, things and discourse (Reckwitz, 2002). From the practice-based approach, we have come to understand phenomena such as strategy, as the nexus of interconnected human practices (Schatzki, Knorr-Cetina, & von Savigny, 2001). Practices can therefore be understood as being clusters of human activity with shared institutional meanings (Schatzki et al., 2001). The central theme in practice theory builds on the idea of emergent and deliberate strategy (Mintzberg & Waters, 1985) where strategy is constituted through the everyday

actions of organisational practitioners (Feldman & Orlikowski, 2011). What is central to the practice perspective is that social life is an ongoing production that is produced and reproduced through human action (Feldman & Orlikowski, 2011). For Feldman and Orlikowski (2011), practice theory is based upon three key themes of consequentiality, dualisms and mutually constitutive relations.

First, the central link between practice and action is the notion of consequentiality (Feldman & Orlikowski, 2011). Activity becomes practice when the act of engaging in the activity is consequential for the development of that activity (Feldman & Orlikowski, 2011). To be consequential, something needs to first, have significance or importance and second, an action or effect needs to arise indirectly from another action, rather than being an intended cause of the initial action (Jarzabkowski et al., 2021). In their review, Jarzabkowski et al. (2021) find studies tend to neglect the second component of consequentiality and the indirect effects of actors' practices on strategy-making. Given that the practice perspective takes into account both the intended and unintended consequential activities (Whittington et al., 2006) this is an important perspective to understand and explain how practitioners engage in new and novel approaches during strategy-making.

Second, practice theory recognises the connectedness with apparent dichotomies, such as objectivity and subjectivity (Reckwitz, 2002). For example, Chia and Holt's (2006) building and dwelling worldviews are commonly seen as opposing and unaligned but perhaps there is scope to form a complementary middle ground in line with the practice perspective. March's (1971) work on sensible foolishness and his advocacy of play is also seemingly opposed to traditional strategy work, which is ordinarily viewed as being based on rational thinking. The concept of bringing together seemingly contrasting and dichotomous components is important for advancing our understanding of SAP research.

Finally, practice theory recognises that phenomena are always connected by being produced and reproduced in mutually constitutive relationships (Feldman & Orlikowski, 2011). Hence, given the recognition that even apparent dichotomies like play and reason may still be complementary, the practice perspective provides the necessary foundation to unpack how these practices mutually unfold and develop during strategy-making.

Having explored what practice theory entails and the origins of practice, it is clear that the micro and daily interactions of everyday life are pivotal to the construction of the sociomaterial

world (Feldman & Orlikowski, 2011). With this understanding, the next subsection will consider Jarzabkowski, Balogun & Seidl's (2007) framework of SAP and the role of practices in strategising.

2.2.2 Three pillars of SAP

From a SAP perspective, strategy has been defined "as a situated, socially accomplished activity, while strategizing comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity" (Jarzabkowski et al., 2007, pp. 7-8). Three interrelated elements comprise the SAP framework, which involve practices, practitioners and praxis. The nexus between practice, praxis and practitioners signifies strategising (Jarzabkowski et al., 2007).

The practices of strategy refer to the wide variety of strategic tools, norms and procedures that make up strategy work (Vaara & Whittington, 2012), such as PowerPoint slides and flipcharts (Jarzabkowski & Whittington, 2008). They are the routines, norms, behaviours and traditions that are shared among a group of actors (Whittington, 2006). Therefore, the notion of 'doing' is an intrinsic part of practices (Jarzabkowski et al., 2007) as the 'things' of strategy such as whiteboards and Post-It notes (Reckwitz, 2002) only become meaningful and impactful when actors use them in their practices. These practices are spread across different levels; at one level, practices may be specific to particular organisations and these practices shape the strategising process (Whittington, 2006). At the higher level, there are societal practices such as types of discourse, that prescribe the legitimate approach to conducting strategy work (Barry & Elmes, 2017). Orlikowski (2007) conceptualises practices as being sociomaterial, where the doing of any activity cannot be separated from the material aspect where the activity takes place.

Praxis relates to the activity and the actual doing (Whittington, 2006) involved in strategy making such as strategic planning (Vaara & Whittington, 2012) and these activities can be both formal (Grant, 2003) and informal (Hoon, 2007). For Jarzabkowski and Spee (2009, p. 73), praxis can be understood as "a stream of activity that interconnects the micro actions of individuals and groups with the wider institutions in which those actions are located and to which they contribute". Praxis allows the micro actions of individuals and groups to be connected the wider institution (Reckwitz, 2002), where strategising can occur across three different levels (Jarzabkowski & Spee, 2009). Micro refers to strategy praxis at the individual

or group level, such as meetings (Jarzabkowski & Spee, 2009). Meso refers to the organisational, such as a change in strategy process (Balogun & Johnson, 2005). Macro refers to the exploration of praxis at the institutional level, such as action within a specific industry (Jarzabkowski & Spee, 2009). A large portion of strategy work can be seen to take place in episodes (Hendry & Seidl, 2003) like strategy workshops. Such episodes may be viewed as the labour of strategy that involves activities including meetings, discussions and debates (Jarzabkowski & Whittington, 2008). The core pillar of praxis centres on action, with particular emphasis on the actions of different people from diverse backgrounds and how their actions can result in contribution (Jarzabkowski et al., 2007).

The final pillar of SAP are the practitioners themselves, who are those individuals involved in strategy work (Vaara & Whittington, 2012) and carry out practices (Whittington, 2006). These individuals may be directly involved in the strategising process, such as managers and consultants or they may have an indirect influence like the media and educational institutions (Jarzabkowski & Whittington, 2008). Existing studies have found that the practitioner may refer to groups of practitioners as well as the individual practitioner (Jarzabkowski & Spee, 2009). There is also a distinction between internal and external practitioners, where internal practitioners have a role within the organisation's hierarchy and external actors who reside outside the organisations, but may still have a role in influencing the strategy of the organisation (Jarzabkowski & Spee, 2009). Practitioners define strategic activity through "who they are, how they act and what practices they draw upon" (Jarzabkowski et al., 2007, p. 10). Though strategy research has generally focused on senior managers (Vaara & Whittington, 2012), middle managers play a vital, if not equally important role in strategy making (Rouleau, 2005). The practitioners of strategy are thus, not solely limited to senior executives (Whittington, 2006), but encompass a variety of organisational actors who engage in strategising. Indeed, a wide body of work has centred on the role of middle managers in accomplishing strategy work (Burgelman et al., 2018). Research in the growing field of open strategy is also exploring the inclusion of wider organisational employees within strategy making (e.g. Brielmaier & Friesl, 2023). Ultimately, the role of practitioners is crucial in producing, reproducing, transferring and on occasion, innovating strategy practices (Whittington, 2006).

This overview of practices, praxis and practitioner offers an interrelated framework that underpins SAP and denotes the overlap between the three elements as the point of strategising (Jarzabkowski et al., 2007). Thus far, the opening section of this chapter has

detailed the meaning behind the practice perspective and what constitutes strategising from existing SAP research, that involves practices, praxis and practitioners. Taken together, research has pointed towards the critical role of tools, materials alongside other technologies of rationality, which managers draw upon to help guide them through strategic decision making using rational and logical means. The following sub-section will explore what we already know about how managers strategise complex organisational challenges and the tools and materials they draw upon.

2.2.3 Strategising with tools and materials

Managers frequently encounter ambiguous and complex challenges that face their organisations (Burke & Wolf, 2021) and to address these challenges, managers may gather together in meeting spaces to strategise and make high-stakes decisions when tackling strategic issues (Kwon et al., 2014). Strategic decisions are typically those made by top leaders within organisations where such decisions impact organisational survival (Eisenhardt & Zbaracki, 1992). Research has shown how managers use language to reach particular ends (Cornelissen, Holt, & Zundel, 2011), which can help shape understanding (Kwon et al., 2014) of organisational challenges. During strategy-making, managers draw upon discourses, technologies and tools that create possibilities for action (Giddens, 1984). These enable various practices, such as strategic planning and budget cycles, to take place (Jarzabkowski & Seidl, 2008). In seeking guidance and support, managers turn to materials and tools, which have been identified as an essential aspect of strategy work (Werle & Seidl, 2015), particularly in the face of complex organisational challenges. Before reviewing existing studies on how tools and materials support managers when faced with complex organisational challenges, some key terms will first be defined, namely: tools, material artefacts and epistemic objects.

Generally, research addressing the role of strategy tools has followed Clark's (1997) definition, describing them as the techniques, methods, models, frameworks, approaches and methodologies that are available to support strategic decision making. These strategy tools are intended to help managers analyse their environment or organisation (Jarratt & Stiles, 2010; Mintzberg, 1994). Such tools have been designed and formulated by academics to help managers tackle problems using theoretical formulations (Vuorinen, Hakala, Kohtamäki, & Uusitalo, 2018). Strategy tools, like Porter's Five Forces and SWOT analysis, are some of the most common materials used by strategists in practice (Jarratt & Stiles, 2010) and are characterised by their ability to codify knowledge about strategy making (Jarzabkowski &

Kaplan, 2015). Managers will select strategy tools based on their characteristics (Lê & Spee, 2015). For instance, managers will select a SWOT analysis based on its structural features i.e. strengths, weaknesses, opportunities and threats (Dameron et al., 2015). When conducting a SWOT analysis, people use things (e.g. pen and paper) to create drafts (Giraudeau, 2008). Drafts hold significance due the knowledge they embed, which is dependent on the nature of the tool and thus, drafts are strategy objects that represent some of the knowledge used in strategy making (Belmondo & Sargis-Roussel, 2015). Strategy objects comprise the materials of strategy, which will now be defined.

For Dameron et al. (2015), there are five categories of materials in strategy work: strategy tools, objects and artefacts, technologies, built spaces and human bodies. Material artefacts have been defined as "those 'things' that are part of the everyday doing of strategy (Jarzabkowski et al., 2013, p. 41). This 'stuff' of strategy like PowerPoint slides and Post-It notes are not innately strategic (Jarzabkowski et al., 2013) or are of strategic benefit to an organisation. It is only when these objects are used in the context of strategy work do they become meaningful. Material artefacts have also been referred to as strategy objects and material objects, which are the material devices that are part of the everyday doing of strategy (Jarzabkowski et al., 2013) and represent strategic knowledge such as strategic planning drafts (Belmondo & Sargis-Roussel, 2015). Within SAP literature, it is broadly recognised that materials comprise the practice of strategy, which allow the labour of strategy work to take place (Jarzabkowski & Whittington, 2008). Materiality studies tend to direct attention to the physical properties of artefacts (Voronov, Foster, Patriotta, & Weber, 2023) and have typically focused on particular material objects that align with prevailing strategy norms and rational practices. Whiteboard, Post-It notes (Reckwitz, 2002), flipcharts, spreadsheets and PowerPoint slides (Jarzabkowski & Whittington, 2008) are materials that are frequently used in practice by managers and feature in materiality studies. These objects comprise "the stuff of strategy" that enable actors to engage in strategy work (Whittington, 2007, p. 1579). Yet, materiality is flexible enough for managers to combine different material elements in different ways and use them in different purposes (Voronov et al., 2023). The sociomateriality perspective focuses less on the properties of materials and more on how materials are used in particular contexts (Orlikowski, 2007).

Epistemic objects have been conceptualised as objects of investigation that are "characteristically open, question-generating and complex" (Knorr Cetina, 1999, p. 181). Such objects do not have fixed properties but instead have properties that emerge and evolve during

investigation (Werle & Seidl, 2015). Given that epistemic objects are characterised by being continuously unfolding, raising questions and prompting answers, they help to generate knowledge and enable practitioners to provisionally grasp their object of enquiry (Comi & Whyte, 2018). They are therefore conceptualised as objects of inquiry and pursuit given that they lack completeness (Ewenstein & Whyte, 2009). In their study, Werle and Seidl (2015) conducted research within a manufacturing company as managers explored a new strategic topic of "flexible production", which was conceptualised as an epistemic object, due to the generative nature and capacity to provoke questions. Another example is in design work, where the instrument being designed can be viewed as an epistemic object that is partially (and incompletely) expressed through visual representations (Ewenstein & Whyte, 2009). Having set out the meanings between these different terms, this section will now move onto exploring what existing SAP studies have uncovered about the role of materiality in strategy-making.

Despite the broad recognition that tools and materials are central to strategising and without which, strategising could not take place (Whittington, 2007), empirical studies on the role of materials remain scarce (Werle & Seidl, 2015). Studies centred on the role of tools and materials have continued to support the widespread view among SAP scholars that materials remain integral to enable strategy work to take place. For instance, Jarzabkowski et al. (2013) examine how material artefacts (e.g. photos, maps and data packs) are used by managers in the process of appraising reinsurance deals. Their study demonstrates how seemingly mundane materials like photos become strategic through their situated use. Kaplan (2011) uncovers the mediating role of PowerPoint through which strategic knowledge is produced. In their study, Whittington et al. (2006) show how a cardboard cube was used to represent and communicate a new organisational strategy. Their study highlighted the need for strategy-making to be more 'hands-on' and how craft skills were necessary skills in strategy processes (Whittington et al., 2006). Furthermore, Stigliani and Ravasi (2012) uncover the supporting role of materiality in sensemaking, where the embodiment of ideas in material form (e.g. sketches) can make mental ideas more accessible and reusable. Studies have also explored how the material properties of tools shape visual interactions and how knowledge is produced, which ultimately influence strategic outcomes during strategy-making (Paroutis, Franco, & Papadopoulos, 2015).

Another stream of research on materiality in strategy making has uncovered the influencing role of materials in terms of future making. For example Thompson and Byrne (2022) analyse

how organisational actors interact with materials like sticky notes and whiteboards to visually represent and organise ideas about imagined futures. In their study, Comi and Whyte (2018) discuss how visual artefacts (material objects) are performative and go beyond simply representing ideas and actively shape how the future is imagined by giving material form to future ideas. Others have explored the 'anchoring' effect of materiality in terms of authenticity claims and the ability to make claims more plausible (Voronov et al., 2023). In terms of the learning process, Huang et al. (2022) show how materials like whiteboards and flipcharts influence team dynamics and can encourage more integrated thinking and collaboration.

The purpose of this subsection has been to review key prevailing SAP literature that investigates the role of tools and materials during strategy making. Research generally points towards the more traditional use of strategy tools with less attention being paid to their emergent properties (Vuorinen et al., 2018). The types of materials being the focus of research is also limited, with research typically considering the role of whiteboards, flipcharts for example. In other words, the more conventional 'stuff' of strategy (Whittington, 2007). Hence, a more comprehensive investigation on the interplay between different kinds of material artefacts and their impact on the strategy-making process is still required (Werle & Seidl, 2015). The next subsection will move onto the limitations of using tools and materials when strategising complex organisational challenges and in particular, the shortcomings of how managers use these tools in practice.

2.2.4 Limitations of tools and materials in times of crisis

Tools and materials are designed to serve practical purposes and are intended to support professionals to enable them to perform tasks efficiently (Robinson & Baum, 2020) and manage the complexities of their environment. However, despite their widespread use, strategy tools at times fail to provide useful outputs (Hill & Westbrook, 1997; Mintzberg, 1994) and a key challenge managers face is that generic strategy tools are of little use when facing complex organisational challenges (Burke & Wolf, 2021; Denis, Langley, & Rouleau, 2007). Wicked problems are an example of such challenges and the use of traditional tools may in fact exacerbate these problems (Camillus, 2008). This is perhaps unsurprising given the nature of strategy tools as they provide a model representation version of reality and thus, they have been viewed as simplified devices (Newell, Shaw, & Simon, 1962).

The limitations of tools and materials has resulted in a growing debate in SAP literature, which has centred on the efficacy of tools when strategising complex and ambiguous challenges (Jarzabkowski & Kaplan, 2015; March, 2006). Scholars have argued that it is especially during times of uncertainty and complexity where the use of strategy tools may be unfitting and even disastrous (March, 2006) as managers may overlook important factors of consideration (Jarzabkowski & Kaplan, 2015). Part of the reason behind this may be attributed to the desire to use these tools in the correct way and at the appropriate time (Rigby & Bilodeau, 2011). Ability to harness tools and to successfully wield these tools to yield desired outcomes has been identified as an indicator of the skill and expertise (Riemer, 1977) of organisational actors. Thus, while studies do maintain that strategy tools have merit in supporting managers (Wright et al., 2013). SAP research has already recognised the challenge facing strategists where the use of conventional tools have failed to provide aid for managers (Burke & Wolf, 2021; Jarzabkowski & Kaplan, 2015) in a world that for many years, has been in a constant state of turmoil (Wickert et al., 2021).

In line with the debate surrounding the efficacy of strategy tools, Jarzabkowski and Kaplan (2015) conceptualise tools as strategy tools-in-use, focusing on how managers actually use these tools in practice, rather than evaluating tool-use as simply right or wrong. The tools-in-use paradigm explains how managers can adapt tools to specific contexts and in ways that diverge from their intended use (Jarzabkowski & Kaplan, 2015; Jarzabkowski & Wilson, 2006). Studies have also found that managers may select tools (like Porter's Five Forces) based on their familiarity and their associated legitimacy, which managers then adapt to suit their own purposes (Jarzabkowski & Wilson, 2006). The tools-in-use paradigm has thus begun to shift materiality research away from exploring the outcomes from using strategy tools and their correct or incorrect use and instead, focusing on the actual use of tools in everyday practice and the recognition that tools enable managers to engage in strategy-making (Burke & Wolf, 2021; Jarzabkowski & Kaplan, 2015; Jarzabkowski & Wilson, 2006). Hence, despite their limitations, tools remain valuable props to aid managers during strategy work (Burke & Wolf, 2021) and the exploration of how they are actually used in the context of strategy making generates (unintended) affordances or action possibilities (Burke & Wolf, 2021; Gibson, 1977). This leads to the next sub-section of this chapter, which will discuss the relationship between materials, affordances and in particular the value from unintended process affordances (Burke & Wolf, 2021) and the implications for strategy making.

2.2.5 Affordances and process affordances

Material artefacts are endowed with affordances that enable or constrain a given strategic action (Eppler & Platts, 2009). Research unpacking affordances, otherwise known as action possibilities (Gibson, 1977), have tended to focus on the affordances of things and the extent to which the material properties of objects favour, shape and invite but also constrain specific uses (Gibson, 1977; Zammuto, Griffith, Majchrzak, Dougherty, & Faraj, 2007). The concept of affordances has been used to explain why people use the same material thing in different ways, where technologies are endowed with the same material properties but afford different possibilities for action based on how they are used (Leonardi, 2011). The affordances that arise from material use are thus dependent on their user and the manner in which materials are deployed in practice. Indeed, the designers of materials create objects with an intended purpose and this purpose gives rise to the possible affordances (Akrich & Latour, 1992). The creative and imaginative abilities of actors enables material properties of objects to go beyond their intended use (Faraj & Azad, 2012). While the human capacity for imagination can facilitate the possible uses a material object can afford, these possibilities are finite (Hutchby, 2001). For example, a chair may be used as a stepping stool but no amount of creativity or imagination can permit a chair to be used as a cook stove (Jarzabkowski & Kaplan, 2015). However, a risk of exploring the affordances of materials is that scholars may list all the possible affordances (Jarzabkowski & Pinch, 2013) with limited consideration of the implications of these affordances in their particular context.

Another body of research has begun to place emphasis on process affordances and in their study, Burke and Wolf (2021) explore how the process of strategy toolmaking may generate process affordances through purposive (conscious but non-deliberate) activity (Bouty, Gomez, & Chia, 2019). Process affordances are defined as “unfolding action possibilities rendered available when managers interact in a sociomaterial setting” (Burke & Wolf, 2021, p. 363). Research on affordances tends to study the affordances of things, which neglects the unintended affordances that arise from sociomaterial interaction (Burke & Wolf, 2021; Comi & Whyte, 2018). With a few exceptions (e.g. Burke & Wolf, 2021) the study of emerging process affordances from purposive action remains a valuable but largely overlooked research agenda. This is important to unpack as research has already recognised the limitations of the rational-deliberate application of materials (Jarzabkowski & Kaplan, 2015; March, 2006), which in turn limit the possible affordances that may arise. The exploration of purposive action and the idea of ‘purposeful purposelessness’ has the potential to offer novel theoretical insights that advance our knowledge of process affordances and tools-in-use.

The next section will explore sociomateriality as a lens, that highlights the interplay between the social and material world, as well as actors themselves. Sociomateriality provides an important lens to study SAP as the activities involved in strategising draw heavily on social practices, and material things and the role of the actor in doing the activity. The affordances of material interaction are also influenced by their sociomaterial setting (Burke & Wolf, 2021). Through this lens, the social and the material are inseparable and are inextricably bound (Orlikowski, 2007), which is important for the study of SAP research, given that "strategy work could hardly happen" without material components (Whittington, 2007, p. 1579).

2.2.6 Exploring SAP research through a sociomaterial lens

Within management and organisation studies, using sociomateriality as a lens to explore phenomena is becoming increasingly popular (Jarzabkowski & Pinch, 2013; Orlikowski & Scott, 2008). Scholars using a sociomaterial lens recognise the deep entanglement between social doings and objects (Jarzabkowski & Pinch, 2013). Sociomateriality has been defined as "the constitutive entanglement of the social and the material in everyday life" (Orlikowski, 2007, p. 1435). In being constitutively entangled, entities cannot exist independently (Barad, 2003) where the social cannot be without the material and the material cannot be without the social (Orlikowski, 2007). Sociomateriality is arguably the most important lens that informs existing work on how managers strategically engage complex organisational challenges using tools and materials. As Whittington (2007) note, managers can only engage in strategy work with materials and hence, strategy-making is only strategy-making with materials and tools.

Conducting research using sociomateriality as a lens can help us understand how human bodies, spatial arrangements, physical objects and technologies are entangled with language, interactions and practices in the doing of activities (Jarzabkowski & Pinch, 2013; Schatzki, 2006). This constitutive entanglement is echoed in the strong view of materiality's relationship with social activity, whereby the strong view assumes a deeply entangled relationship that the material and the social cannot be seen as separate (Dameron et al., 2015). In contrast, the moderate view holds that there is an interplay between the social and the material whereas the weak view merely recognises how materials may impact social behaviour (Dameron et al., 2015). While sociomateriality has been simply referred to as 'materiality' (Jarzabkowski & Pinch, 2013), scholars who adopt the term 'sociomateriality' would likely favour the view that

sociomateriality is a unique from of materiality that shifts attention away from the materials themselves and how these materialised are used (Leonardi, 2012).

Research on sociomateriality therefore moves away from seeing humans and non-human objects as entities that simply influence each other (Orlikowski & Scott, 2008), that is the weak view of sociomateriality (Dameron et al., 2015). Most SAP studies take a moderate view of materiality, where the social and material are distinct but mutually dependent components within strategy-making (Kohtamäki et al., 2022; Werle & Seidl, 2015). Using sociomateriality as a lens will help us understand the doings and on-going production (Orlikowski, 2007) of everyday strategising. In their review of SAP research, Kohtamäki et al. (2022) highlight the use of video technologies to study and capture the richness of sociomaterial interactions as well as the interplay between the social (discourses), material and embodied aspects of strategy work.

Table 2.1: Summary of main debates within SAP research

Key theme	Main arguments and debates	Reference
Practice theory	Emphasis on people's everyday activities	Reckwitz (2002) Schultze & Orlikowski (2004) Whittington et al. (2006)
	Practices are clusters of human activity	Schatzki et al. (2001)
	Strategy is constituted through everyday interactions	Feldman & Orlikowski (2011) Mintzberg & Waters (1985)
Three pillars of SAP	The nexus between practice, practitioners and praxis signifies strategising	Jarzabkowski et al. (2007)
Materiality in SAP	Materials enable strategy making to take place	Jarzabkowski et al. (2013) Jarzabkowski & Whittington (2008) Whittington (2007)
	Materials become meaningful when they are used in the context of strategy work	Jarzabkowski et al. (2013) Jarzabkowski & Whittington (2008)
	Tendency to focus on the properties of materials	Voronov et al. (2023)
Limitations of using materials in strategy-making	Materials fail to yield desired and/or useful outputs	Hill & Westbrook (1997) March (2006) Mintzberg (1994)
	Generic strategy tools are of little use in the face of complex organisational challenges	Burke & Wolf (2021) Camillus (2008) Denis et al. (2007)
	Managerial desire to use materials logically and correctly	Jarzabkowski & Kaplan (2015) Rigby & Bilodeau (2011)
Affordances theory	Affordances (or action possibilities) are the extent to which the properties of materials, invite and constrain their use	Gibson (1977) Zammuto et al. (2007)
	Research tends to focus on the affordances of things	Jarzabkowski & Kaplan (2015) Jarzabkowski & Pinch (2013) Leonardi, 2011
	Process affordances research begins to explore the emerging action possibilities in a sociomaterial setting	Burke & Wolf, 2021
Sociomateriality	Scholars using a sociomaterial lens recognize the deep entanglement between social doings and materials	Jarzabkowski & Pinch (2013) Schatzki (2006)
	There are three views of materiality. The strong view holds materials and the social world cannot be seen as separate. The moderate view holds that there is an interplay between the two. The weak view holds that materials only impact social behaviour	Dameron et al. (2015)
	Most SAP studies take the moderate view of sociomateriality	Kohtamäki et al. (2022) Werle & Seidl (2015)

2.2.7 Summary: Remaining unknowns

The first section of this literature review chapter has intended to review key literature within the SAP field to summarise what we already know from existing studies and more importantly, what we still seem to lack an understanding of and remaining questions to be answered. The review of key SAP research has revealed three lingering unknowns, which remain to be answered that will be tackled in the remainder of this thesis. First, we still seem to lack understanding of how different materialities can be of value during strategy-making and the process affordances that arise from their use. Research has tended to favour the more conventional 'stuff' of strategy such as whiteboards and Post-It notes and we know much less about other categories of materials, like toys, which are considered innately playful (Huang et al., 2022). Second, while research has started to focus more on how tools are used in practice (Jarzabkowski & Kaplan, 2015), there is still a tendency for managers to seek to use materials in the correct way (Rigby & Bilodeau, 2011) to realise expected and desired outcomes. Using video ethnographic approaches (Kohtamäki et al., 2022) to closely follow how managers use tools in practice through purposeful purposelessness is an area in need of further exploration. Building on the concept of purposive action (Bouty et al., 2019), I position purposeful purposelessness as actors who consciously engage in particular activity, but with no particular goal or intended purpose fuelling their action. This links to the third unknown, which considers the process of how actors do things for no good reason (March, 1971) and value that arises from this interaction, which remains largely unaddressed within SAP research. The next section of this literature review chapter will move onto the spaces in which strategy-making takes place, in particular, this thesis reviews research on strategy workshops.

2.3 Strategy workshops as creative spaces

Formal strategising episodes, like strategy workshops (also referred to as strategy retreats, away days and strategic 'off-sites') (Healey, Hodgkinson, Whittington, & Johnson, 2015), have been identified as interesting opportunities for SAP research to pay close attention to the social practices of strategy (Jarzabkowski & Seidl, 2008). These workshops have been identified as part of routine practices and are seen not as a 'one-off' event but rather as an essential component of organisational life (Hendry & Seidl, 2003; Hodgkinson, Whittington, Johnson, & Schwarz, 2006). The in-depth exploration of strategy making within these settings may also be particularly insightful when hidden micro-interactions and dynamics are revealed, which may not immediately appear as strategic (Rouleau, 2005). During strategy workshops,

participants draw on material, bodily and discursive practices to imagine strategic opportunities (Seidl & Guerard, 2015). As highlighted in the previous section of this chapter, SAP research in the context of strategy workshops has tended to focus on the use of those mundane materials such as PowerPoint slides (Kaplan, 2011; Werle & Seidl, 2015). With the exception of some serious play studies (e.g. Roos & Victor, 2018), we still know significantly less about the process of how actors use different materialities to support them as they engage complex organisational challenges.

For organisations, strategy workshops are a common practice (Hendry & Seidl, 2003) and are found to be influential in shaping strategy processes (Seidl & Guerard, 2015). These workshops are also typically lead by a skilled facilitator, whose role is to guide participants through a particular agenda and to help ensure the activity being pursued is group-driven rather than being pushed by a single individual (Heracleous & Jacobs, 2008). Strategy workshops tend to take place at an off-site location and are typically attended by senior managers, thus adhering to the traditional view of strategy workshops being exclusive events (Hodgkinson et al., 2006). However, the growing research agenda on open strategy and organisations obtaining wider strategic inclusion has sought to unpack how wider employees can be involved and have their voices heard during strategy-making (e.g Brielmaier & Friesl, 2023; Splitter et al., 2024). Indeed, research has found how wider inclusion within strategy workshops can lead to improved interpersonal outcomes and improve participant relationships (Healey et al., 2015). However, these studies tend to focus less on the process of how these interpersonal dynamics between participants unfold over time. These studies also generally fail to capture the process of how organisational members oscillate between periods of purposeful and logical thinking and periods of purposeful purposelessness.

Despite the strategy workshops providing opportunities for the emergence of practical understandings (Thomas, Sargent, & Hardy, 2011), the ideas generated within strategy workshops tend to fail to translate back to the organisation and feed into organisational strategy. To help overcome this limitation, scholars have argued for research to study a series of workshops, rather than one singular workshop in isolation, which can increase the influence of findings generated within the workshop series to translate back into organisational operations (Healey et al., 2015; Seidl & Guerard, 2015). Studies have also called for future research to explore the unfolding dynamics within workshops (Hodgkinson et al., 2006) that uncover the process by which dynamics emerge and unfold over the course of strategy-making taking place at these away days and off-site retreats.

2.3.1 Strategy workshops as liminal spaces

Strategy workshops are characterised by their (temporary) suspension of ordinary hierarchies, structures and rules (Johnson, Prashantham, Floyd, & Bourque, 2010), giving participants the freedom to express their ideas, opinions and even criticisms. They have thus been identified as liminal spaces, comprising environments that are not bound by everyday routines, nor being made entirely separate (Sturdy et al., 2006). Liminality has been described as the fluid state where participants are distanced from their everyday experiences (Johnson et al., 2010) and being in a 'sort of social limbo' (Turner, 1982, p. 24) that can help new ideas to emerge (Seidl & Guerard, 2015). Johnson et al. (2010) identify two key behavioural characteristics of liminal states. First, these states encourage 'anti-structure' where participants are freed from conventional norms and hierarchies. Second is the idea of communitas, which comprises feelings of confidence and enthusiasm. Put together, research has shown how liminality can serve as a creative state, though the liminality achieved in strategy workshops is temporary, as prevailing hierarchies resume once participants return to their normal organisational positions (Johnson et al., 2010). Therefore, while strategy workshops offer spaces for structures to be suspended, elements of organisational structures and organisational hierarchy may still persist in these liminal spaces (Sturdy et al., 2006).

In line with the research stream characterising strategy workshops as liminal spaces, another body of research has conceptualised strategy workshops as 'strategic episodes' where workshops act as spaces that temporarily suspend prevailing organisational structures and routines, thus providing space for potential change (Hendry & Seidl, 2003). To help bring about potential change practitioner mindsets (Heracleous & Jacobs, 2008) and strategic change, strategy workshops need to enable discursive structures to change e.g. tools and frameworks (Hendry & Seidl, 2003). However, studies have found that generic strategy tools, namely SWOT analysis, commonly feature within strategy workshops (Hodgkinson et al., 2006), which may shape and guide discussion. The continued focus on established theories and frameworks within strategy workshops presents an inherent limitation for managers, who tend to remain fixated on established practices when faced with novel and ambiguous challenges. Put together, studies on strategy workshops as liminal spaces and strategy episodes have shown how such spaces allow participants to be freed from their established organisational structures. These studies also identify the outcomes from strategy workshops, such as impact on relationships and understanding of strategic issues (Seidl & Guerard, 2015). Yet, what

these studies seem to neglect is the process of how organisational actors temporarily escape these hierarchical structures. The momentary freedom provided by strategy workshops however is not a switch that can be turned immediately on and off, instead, participants will undergo a transitional process to reach these liminal states. This process and how this process unfolds still remains to be addressed and is important to help us further understand how participants escape these established organisational structures and how they are resumed.

2.3.2 Sharing ideas and emotions during strategy-making

Strategy episodes can enable new forms of discourse to emerge, given the suspension of normal organisational structures (Hendry & Seidl, 2003). During strategy workshop spaces (and in strategy-making sessions), discourse and materials are inherently intertwined (Leonardi & Barley, 2011) where discourse has been defined as "any body of language based on communications" (Hendry, 2000, p. 964). For example, materials such as PowerPoint slides can influence the focus of communication and who participates in said communication (Kaplan, 2011). Strategy work is thus embedded within institutionalised conventions such as meetings and workshops and the accompanying materials, which provide discursive resources that influence the strategy work taking place (Balogun, Jacobs, Jarzabkowski, Mantere, & Vaara, 2014). Yet, despite the recognition of the influencing role materials have on discourse within strategy-making, research continues to lean towards the exploration of discursive practices and communication that takes place with spoken words or written texts, rather than other manners of communication that can unfold in liminal spaces, such as through the body and materials.

The interaction between actors is not solely dependent on spoken words but also emotion, whereby the emotions displayed during conversations between actors can have a significant impact on strategy development and implementation (Liu & Maitlis, 2014). The emotional tone, facial expressions and body language that accompanies spoken words can lead to vastly different interpretations and understandings (Liu & Maitlis, 2014). Research has found that when strategy is widened or opened up, managers engage in more elaborate discourse justifications (Tavella, 2021). By opening up strategy and allowing wider participation, the expertise of different actors can be leveraged, thereby fostering the creation of more superior strategies (Brielmaier & Friesl, 2023). Indeed, this ties in with Goffman's (1956) dramaturgical perspective, where actors present a different version of themselves (using spoken words, facial expressions, and body language) depending on their situation to lead to a desired

outcome. Based on Tavella's (2021) study, managers may therefore seek to present an authoritative version of themselves to reinforce their position in hierarchy by drawing on particular discursive practices. Discursive practices can therefore be seen to have a performative effect (Mantere & Vaara, 2008). However, the influencing role of materials in affecting strategy discourse and more importantly, the process of how materials shape communication remains largely undertheorised within research.

The use of stories in the strategising process has also gained increasing relevance (de La Ville & Mounoud, 2010) where storytelling can lead to practically advantageous strategic plans and the effective communication of strategic intent (Küpers, Mantere, & Statler, 2013). Metaphors are commonly present when actors present and share their stories as the construction and then interpretation of metaphors can allow meanings to be engendered that previously may not have been considered (Heracleous & Jacobs, 2008). Storytelling can also allow realisation of what needs to be done differently as individuals may become entrapped in previous modes of operating and fail to see the need for change (Küpers et al., 2013). The key challenge of any story or narrative is whether the audience is convinced and whether the story is compelling enough to action (Barry & Elmes, 1997).

So far, the second section of this literature review chapter has discussed key highlights from existing studies exploring strategy-making in the context of workshops. These studies have shown the ability of workshops to act as liminal spaces, for rules to be temporarily suspended and scope for wider inclusion in strategy. Studies have also paid attention to the role of discourse and subsequent impact on emotions through the influencing role of materials. However, a key unknown that remains is the process by which these practices unfold and in the context of strategy workshops. These studies have also considered the value of bringing in wider organisational actors into strategy workshops. The third section of this chapter will therefore review research on open strategy, in particular achieving wider strategic inclusion.

2.4 Opening strategy: Widening strategic inclusion

The third section of this literature review chapter will provide an overview of what existing studies in open strategy have already discovered about widening inclusion in strategy. This thesis is not intended to explicitly contribute to the growing research field of open strategy but instead, focus primarily on a growing theme in open strategy literature, that focuses on widening and the role of inclusion and how temporarily suspending power dynamics in the

context of strategy workshops may foster wider strategic inclusion. Thus, this section will review select literature within the field of open strategy, centred on strategic inclusion and how strategic inclusion is achieved while also paying close attention to remining unknowns about how wider organisational employees participate and get their voices legitimately heard during strategy making. This section will consist of two parts. The first part will review select literature and provide an overview of what existing studies have discovered about open strategy including benefits and challenges. Second, this section will zoom in on how strategic inclusion can be widened through discursive practices, the limitations of focusing primarily on discourse, and remaining questions this thesis aims to address.

2.4.1 Opening strategy: What do we already know?

Open strategy has been identified as a process rather than a goal to achieve and at its simplest, open strategy promises increased inclusion and transparency involving both internal and external stakeholders regarding strategic issues (Whittington, Cailluet, & Yakis-Douglas, 2011). It combines principles related to open innovation with traditional strategy to capture value in new ways (Chesbrough & Appleyard, 2007). The process thus challenges historic views of strategy being linked with the corporate elites and how strategy discourse has been associated with influence and power (Knights & Morgan, 1991). Open strategy comprises dynamic practices that 'affords internal and external actors greater strategic transparency and/or inclusion' (Hautz et al., 2017, p. 299). Studies have found that while organisations are increasingly adopting practice to open-up their strategy processes, firms may also adopt hybrid approaches and blend both open and closed elements (Appleyard & Chesbrough, 2017). Fundamentally however, open strategy involves both greater inclusiveness (i.e. who is involved in strategy) and greater transparency (i.e. sharing of information) (Birkinshaw, 2017; Hautz et al., 2017). In their study, Gegenhuber and Dobusch (2017) identify three modes of open strategy-making that are employed by firms. Broadcasting, which communicates relevant strategic information. Dialoguing, where managers ask for opinions and engage in conversation and including, which is the act of actively involving wider organisational actors in strategic decision making. Research has generally pointed towards the benefits of organisations opening up strategy-making and these benefits will now be explored.

In their study, Mack and Szulanski (2017) distinguish between two types of practices in open strategy. Participation relates to gathering information from wider actors whereas inclusion relates to the creation of ongoing connection and engagement from wider actors in strategic

conversations. In line with increased openness, more people are able to get involved in strategic conversation (Hautz et al., 2017) with studies finding a wide range of associated benefits. Stieger, Matzler, Chatterjee, and Ladstaetter-Fussenegger (2012) find a greater connection between organisational members and improved creativity through a wider range of contributions. In their paper, Brielmaier and Friesl (2023) find two key benefits of open strategy. First, the process enables strategic knowledge to be distributed across different organisational levels and second, open strategy initiatives allow the expertise of a wider range of actors to be leveraged, thus leading to the creation of superior strategies. More general benefits associated with open strategy relate to improved idea generation due to ideas coming from a wider pool of participants and improved decision making quality over the long term (Mack & Szulanski, 2017). Moreover, the opening up of strategy is also found to improve commitment and understanding in strategy implementation (Whittington et al., 2011). While these studies have identified a range of benefits of organisations making strategy-work, more inclusive and higher participation is not directly result in greater strategic value (Stieger et al., 2012) and there are also challenges associated with opening-up strategic practices.

Studies have found that while open strategy aims to increase contributions from wider organisational members, participation can still remain uneven with a small number of members providing greatest input (Dobusch, Dobusch, & Müller-Seitz, 2019). Others have also identified dilemmas associated with pursuing open strategy, for example, the escalation dilemma where opening up in one area puts pressures to open up in other areas also (Hautz et al., 2017) and the process can also create tensions among different groups of participants (Splitter, Jarzabkowski, & Seidl, 2023). Another dilemma is related to empowerment and while opening-up strategy can empower employees, it can also increase burden (Hautz et al., 2017). Moreover, research has found challenges related to information asymmetry, where wider organisational actors may not have the same access to strategic information, which can limit their ability (and willingness) to contribute to strategic issues (Luedicke, Husemann, Furnari, & Ladstaetter, 2017). Others have found challenges associated with anonymity and how employees may feel hesitant to speak (Stieger et al., 2012) and because of this, wider organisational employees may lack the confidence to share ideas and sentiments in strategy-making sessions. The body of research on open strategy thus illustrates a range of benefits but also challenges for managers and their organisations seeking to make strategy work more open and inclusive. The question of how this is achieved has typically been studied in relation to discursive practices, which will be discussed in the next section.

2.4.2 Achieving strategic inclusion with discursive practices

As detailed in the former section, open strategy processes to foster inclusion of non-managerial employees contrasts with conventional strategy discourse that emphasise exclusivity and secrecy (Langenmayr et al., 2024). These discursive practices refer to the different ways employees communicate, construct and share their ideas (Mantere & Vaara, 2008; Splitter et al., 2024). Such inclusive practices can be effective but non-managerial employees need to develop the discursive competence to be heard by managers, such as employees drawing on their local, operational knowledge (Splitter et al., 2024). A stream of research in open strategy thus explores the role of discursive practices in fostering wider strategic inclusion, which help us better understand how non-strategists build a strategist identity (Brielmaier & Friesl, 2023) to not only participate in strategy but legitimately have their voices heard and considered. For Splitter et al. (2024), it is not enough to simply include wider organisational employees in strategy meetings or workshops, these employees need to learn how to articulate ideas that successfully integrates their local knowledge with corporate level ideas. Non-managerial employees need to develop discursive competence, which they can achieve through experiential learning (interacting with managers) or vicarious learning (observing the interactions of others) (Splitter et al., 2024).

Moreover, in their paper, Luedicke et al. (2017) find how changing discourses and ways of talking about strategy is important for enabling wider inclusion and participation. Studies have identified how discourses can promote participation in strategy and the importance of dialogue in the strategy process to help give voice to other organisational members (Mantere & Vaara, 2008). Indeed, even if wider organisational actors have the opportunity to be involved and participate in strategy, these actors may actively choose not to engage in strategic discussion (Luedicke et al., 2017) as these actors may lack the discursive ability (Splitter et al., 2024) and/or confidence to do so. This may lead to decisions that are not truly representative as they are not collectively made by all organisational actors (Luedicke et al., 2017). Thus, the process of how wider organisational employees can be encouraged to participate in strategy and gain the confidence to do so are important questions to address.

Open strategy processes to achieve widened participation does not automatically lead to more inclusive strategy making (Splitter et al., 2023). Studies have shown how wider organisational actors need to develop their discursive competence to be included (Splitter et al., 2024). However, these studies tend to neglect the role of materials and non-discursive means of communication. It seems apparent that existing studies tend to focus on the discursive

practices involved in making strategy more inclusive, with comparatively less attention being focused on the bodily practices and role of materials in achieving openness. Achieving strategic inclusion is important for organisations to allow diverse perspectives to surface (Mack & Szulanski, 2017) though prevailing studies seem to address the question of how to reach strategic inclusion using discursive practices. Scholars have called for future research to explore the opening-up of strategy across different cases and for research to better understand the practices of increased openness in strategy (Hautz et al., 2017). Hence, an important yet largely neglected question in the research stream of gaining strategic inclusion centres on how inclusion in strategy can be achieved through non-discursive practices.

The final section of the first half of this literature review will explore what we already know about irrationality in strategy-making and practices that do not necessarily align with prevailing view of rational decision making. This final section will also address how questions raised in earlier parts of this chapter can be tackled using novel and unconventional practices. To address these questions, a perspective of play and March's (1971) sensible foolishness will be presented as a novel perspective to tackle current questions within SAP research.

2.5 (Ir)rationality within strategy-making

Thus far, the first part of this literature review chapter has reviewed what current research has told us about how managers strategise serious and complex organisational challenges using tools and materials, how strategy-making takes place in the context of workshops and how wider strategic inclusion is achieved through discursive practices. The use of such tools and materials during strategy-making promote procedural rationality; that is making sensible, logical and reasoned choices (March, 2006; Ocasio et al., 2019). Traditionally, research on strategic decision making has found that decision makers seek to make rational choices (Eisenhardt & Zbaracki, 1992). Such procedural rationality is driven by the widespread view that success in strategy is associated with a 'means-ends logic of rationality in making decisions' (Chia & Holt, 2023, p. 2). However, the dominant view that procedural rationality is a prerequisite for success in organisation has already been challenged by practice scholars (e.g. Chia & Holt, 2023; Jarzabkowski & Kaplan, 2015). These challenges coincide with March's (1971, 1999) ideas that prevailing models of intelligence can be misguided and even lead to disastrous outcomes. In light of this March (1971, p. 259) proposes that organisations need to "supplant the technology of reason" with other instruments of intelligence, such as sensible foolishness.

The final section of the first part of this literature review chapter will therefore consider studies that have begun to explore how managers strategise complex organisational challenges using approaches that diverge from prevailing models of intelligence and the dominance of procedural rationality. Hence, this chapter will draw on Chia and Holt's (2023) building and dwelling modes of strategising and the notion of strategy as wayfinding, where strategy is less about following a pre-determined map and 'knowing where to go' but about 'knowing as we go' and practical coping. Such studies challenge conventional modes of strategising and begin to incorporate different models of intelligence. In line with these new models of intelligence, this chapter will conclude with what March (1971) identifies as an important instrument of intelligence: play, which remains largely overlooked, understudied and undertheorised within SAP research.

2.5.1 Building and dwelling worldviews

Practice scholars have already begun to advocate for understanding strategy as an ongoing phenomenon that is centred on coping and adapting, rather than executing pre-determined plans (Chia & Holt, 2010). This is what Chia and Holt (2010) call building and dwelling perspectives of strategy. The building mode of strategising is associated with deliberate, purposeful and goal-directed strategic action where actions are outcome-oriented (Chia & Holt, 2010). Such a view of strategising coincides with the prevailing view that strategic decision making is a rational process based on logical and analytical thinking (Cabantous & Gond, 2011; Calabretta et al., 2017) to reach pre-set goals. In line with the building mode of strategising, managers pursue goal-directed behaviours (Kwon et al., 2014) and evaluate strategic issues (Liu & Maitlis, 2014) using "technologies of rationality" (March, 2006, p. 211) such as tools and frameworks like scenario planning. Indeed, materiality studies still tend to focus on the effectiveness of strategy tool use and these technologies of rationality. However, Belmondo and Sargis-Roussel (2015) find that strategy tools often fail to perform (as desired) because managers are unable reach an agreement on meaning or intention. Research is continuing to align with the rational-deliberate perspective of strategy and that tools should only be used when they are likely to benefit organisations (Arend, 2024). This view continues to feed the belief in both theory and practice, that managers need to use tools in the correct way and at the appropriate time (Rigby & Bilodeau, 2011).

On the other hand, the dwelling mode of strategising places focus on the tacit, internalised and largely unconscious knowledge and capabilities (Chia & Holt, 2010). This mode of strategising emphasises how strategy emerges without having deliberate strategic intent, which Chia and Holt (2010) argue is more closely aligned with how strategy-making unfolds in practice, where managers respond to changes in their environment and adapt and respond accordingly. Spotlighting tacit and unconscious knowledge that unfolds as actors navigate strategic challenges goes against the prevalence of procedural rationality and "sanctification of rational choice" (March, 2006, p. 207). Such studies shed light on other modes of practical intelligence (Chia & Mackay, 2023) that are not centred on the correct and rational application of tools and materials. The practice of knowing as we go, rather than following a pre-determined map when navigating strategy coincides with the view of understanding strategy as wayfinding, where managers attune themselves to their environment and respond intuitively to it (Chia & Holt, 2010), giving scope for spontaneous actions in strategising, rather than focusing on pursuing deliberate planning (Comi & Whyte, 2018). Notions of dwelling and wayfinding thus offer an alternative view to understanding strategy that is based on 'means-ends logic' and driven by deliberate intentions (Chia & Holt, 2023).

Drawing on the dwelling mode of strategising and notions of wayfinding, scholars are beginning to pay closer attention to unpacking the process of how strategy emerges and unfolds, which relies less on procedural rationality and guidance from technologies of rationality and instead, on unconscious action, intuitive responses and spontaneous action (Chia & Holt, 2010; Comi & Whyte, 2018). These notions coincide with March's (1971, 1999) work, who argues that procedural rationality and sensible foolishness are vital in pursuing organisational intelligence (Ocasio et al., 2019). The building and dwelling modes of strategising thus tend to overlook a promising and potentially attractive mode of strategising that can act as a bridge between the two modes. This bridge comes in the form of play, which March sees as essential to realising sensible foolishness. The final section of the first half of this chapter will briefly illustrate the importance of play, it's significance and the promise it holds for the future of SAP research.

2.5.2 What's missing? Play

In line with March's (1971, 1999) ideas of sensible foolishness, the concept of play has been put forward as a mechanism to help managers depart from existing mindsets and temporarily suspend rational imperatives and organisational norms. The idea of bringing play into strategy

work is however not a new phenomenon and has already been explored in a body of research known as serious play (Roos & Victor, 2018; Roos et al., 2004; Statler et al., 2009). Studies on serious play however continue to align with rational and building modes of strategising, focusing on outcomes (Chia & Holt, 2010) that arise from the interaction between play and strategising, given that serious play remains a goal-oriented activity (Statler et al., 2011). What we know much less about is how playfulness can invite behaviour that does not conform with traditional views of intelligence and the process by which this infolds in the context of strategy making. This is important to study for two key reasons.

First, for March (2010), play is a vital and generative instrument of intelligence but play is not designed to supplant conventional modes of strategising. Rather, play is a valuable complement but what research has not yet unpacked is the process by which play and traditional practices of procedural rationality unfold over the course of strategy-making sessions such as workshops (Seidl & Guerard, 2015). Hence, we still have a limited understanding of how practitioners actually doing strategy making can temporarily escape their logic of reason and realise the value from sensible foolishness (March, 1971). As March (1971) explains, playfulness helps to foster experimentation while also accepting reason and logical thinking. Sensible foolishness, while encouraging play, recognises that play cannot continue in perpetuity and so it will be eventually stopped as the suspension of rules and norms is only temporary (March, 1971). While March's work has received praise from scholars (e.g. Larsen, 2020), we still lack a theoretical understanding of how the interplay between play and reason unfolds during strategy-making, alongside the enabling forces of play as well as the constraining forces that pull practitioners back towards logical thinking.

Second, by unpacking the interplay between play and reason in strategy-making episodes, this can shed light on the power relations, norms and materials that will likely curtail sensible foolishness. For March (1971, p. 261), play and reason are "behavioral competitors" that draw upon different managerial orientations in strategising. The oscillation between the two forces will thus likely alter the dynamic between practitioners during strategy-making, revealing both enabling and constraining forces of play. Understanding how organisational actors shift between these different modes is thus crucial. It is also vital to explore the impact of the interplay between play and reason on inclusion in strategy, given that the incorporation of play will likely alter the dynamic in strategy-making sessions.

Having outlined the importance and need of incorporating play into strategy work, this acts as the point of departure for the first half of this literature review chapter. The second half of this chapter will review studies on play and explain in detail what play actually is and dive deeper into what existing studies have already told us about play in strategy work. Critically, this chapter will conclude with key questions that remain unanswered surrounding the interplay between play and reason, which will be addressed in this thesis.

Part II: Play

2.6 Play: An introduction

From the first half of this literature review chapter, it is clear that existing studies (e.g. Burke & Wolf, 2021; Chia & Holt, 2023; Jarzabkowski & Kaplan, 2015; Ocasio et al., 2019) have started to unpack the value of strategising that diverges from the means-ends logic that prioritises rational-deliberate thinking (Chia & Holt, 2023) and procedural rationality. This thesis aims to dive deeper into this body of research, exploring and thoroughly unpacking the process of how organisational actors are able to depart from institutionalised practices and norms. Part of the solution to enhancing the effectiveness of strategy-making using tools and materials and to extend our current understanding of how managers use tools in practice may lie in better appreciating the processes by which play can stimulate more creative engagement and interaction between actors and between actors and materials. This calls for research to uncover the processes and the interactions that the interplay between play and reason can cultivate to help practitioners as they tackle complex organisational challenges, which as studies have already found, technologies of rationality fail to adequately address (March, 2006).

The second half of this review chapter will argue that play, broadly defined as an activity that is freely undertaken for the purposes of pleasure and enjoyment (Csikszentmihalyi, 1975; Piaget, 2013; Vygotsky & Cole, 1978), offers essential yet largely overlooked insights that can significantly inform the study of SAP and research on strategy tools-in-use. However, because the play literature is highly fragmented, drawing on different traditions and theoretical perspectives, management and organisational scholars (including serious play scholars) have tended to omit the many rich insights offered by this literature. The second half of this chapter aims to first, highlight critical insights from play studies that can inform the study of strategy work and second, synthesis these insights to provide a theoretical basis for empirical explorations for the remainder of this thesis. The following section of this chapter will comprise five key sections. First, drawing on various disciplines, the origins of play are discussed. Second, the meaning of play and what play actually is will be clearly defined. Third, the various perspectives of play are uncovered. Fourth, March's (1971, 1999) work on sensible foolishness and the importance of bringing play into organisational studies are thoroughly explored, thus bridging the gap between play, sensible foolishness and SAP. Fifth, a critical review of serious play studies is provided and what existing studies of play in strategy have

already told us. Finally, this chapter concludes with the research questions this thesis aims to answer.

2.7 Origins of play

Play has been around since the dawn of time in both humans and nonhumans (Bjorklund & Gardiner, 2010) with play originating in the earliest mammals around seventy million years ago (Byers, 1984). When freely engaging in the act of play, animals draw on objects such as sticks or vegetation (Gray, 2018), which has been referred to as object play (Bjorklund & Gardiner, 2010). Object play can allow animals to gain an understanding of these tools, which they then use for their survival in adult life. For example, one study followed two groups of chimpanzees where one group of primates played with sticks and the other group did not. It was only the former group that engaged in object play that were able to join the sticks together to reach a banana that would have otherwise been out of reach (Gray, 2018). Other studies revealed similar findings about how actors who play with objects, learn about their affordances and are then able to manipulate these objects to serve other objectives (Lockman, 2000). Play thus has its antecedents with object and tool use and even though the playful interaction with these objects may not serve immediate or apparent benefits, the interactions provides scope for knowledge and understanding to emerge (Chia & Holt, 2023).

While the practice of play is not taught, people know exactly what to do and are biologically designed to do so (Gray, 2018). Play is arguably therefore engrained into the minds and bodies of actors but yet, due to the social structures and norms, the concept of adults engaging in play in the workplace is often met with resistance and negative associations (Rieber, Smith, & Noah, 1998). Despite resistance to play in the workplace, research has proposed that play can help actors develop social and communicative skills and play also helps determine hierarchical roles (Sutton-Smith, 1997). Beyond this, scholars have advocated the view that play can help actors cope with unexpected events (Gray, 2018). Studies on play have generally pointed towards the benefits of the activity but scholars have also highlighted that play takes up time and energy, which could have otherwise been used for growth and development (Sharpe, 2018). This coincides with the dominant view of play in organisational studies where play is seen as inferior to rational decision making. Rather than engaging in play, organisational members would have their time better spent on conducting logical analysis.

The purpose of this first section on the origins of play has been to show how the activity is embedded into the biology and make-up of humans (and animals). Yet, despite the value offered by play, due to the development of social norms and structures, organisational actors have come to reject the notion of play, especially when facing serious and high-stakes organisational challenges, which managers view as demanding logical thinking and procedural rationality. The next section will clearly define and unpack what play actually is and begin to tease out the elements that are already evidenced in strategy-making and the elements that hold significant promise to advance our understanding of how managers strategise complex organisational challenges.

2.8 Play: What is it really?

Studies on play are wide and varied but also fragmented, with understandings of play ranging from psychology to pedagogy. Due to the widespread literature, there seems to be little agreement on a single unified definition of what play actually is and there is also much ambiguity associated with the concept (Sutton-Smith, 1997). Despite the fragmentation within play studies, it is widely accepted that “all play means something” (Huizinga, 1950, p. 19). While a single accepted definition of play continues to elude studies, this thesis will adopt the definition of play provided by Eberle (2014, p. 231) who defines play as “an ancient, voluntary, ‘emergent’ process driven by pleasure that yet strengthens our muscles, instructs our social skills, tempers and deepens our positive emotions, and enables a state of balance that leaves us poised to play some more”. In line with this definition of play, this section will now unpack three primary characteristics of play.

First, play is an activity that is intentionally pursued for the purpose of pleasure and enjoyment (Millar, 1968; Piaget, 1945; Van Vleet & Feeney, 2015). Feelings of pleasure have been identified as a defining trait of play that encourages actors to continue to engage in the activity (Eberle, 2014). This pleasure can manifest in different ways such as through laugher, exaggerated body movements and playful facial expressions such as widened eyes (Bjorklund & Gardiner, 2010; Gray, 2018; Palagi et al., 2016; Sully, 1902). However, other scholars have interpreted laughter as representing hostile triumph (Cohen, 1993), rather than a physical indication of joy. The true meaning behind physical actions from play can thus only be truly understood by the actors themselves. Though the wider play literature tends to agree on physical indicators such as laughter and smiling being associated with the pleasure that arises from play. Play has no instrumental goals and actors who engage in play do so without desired

ends to achieve (Singer & Singer, 1990) other than feelings of pleasure. While studies have shown that pleasure is not guaranteed to arise from play, the intention is to enjoy the activity (Vygotsky, 1933). In particular, it is this fun-element that is the very essence of play (Huizinga, 1950) as other activities may be considered enjoyable, but not necessarily fun.

Second, play is considered an autotelic activity with only intrinsic motivators (Csikszentmihalyi, 1975; Gray, 2018). Users engaging in play have no defined purpose to fulfil (Dweck, Elliot, & Hetherington, 1983) apart from achieving feelings of enjoyment. In other words, play is an end in itself and is not pursued to deliberately achieve other means. Play is therefore intrinsically motivated, often driven by a desire to forget personal problems and transcend ego boundaries (Csikszentmihalyi, 1975). Play thus holds the potential to enable organisational members to let down their guard and adopt new modes of thinking that can support them in crafting their own roadmaps rather than following pre-defined ones. Despite the freedom offered by play, the activity "always involves rules" (Vygotsky & Cole, 1978, p. 94) but unlike 'ordinary' activity where rules are predefined, rules in play are created by the players and are flexible and open to change (Parker-Rees & Willan, 2006). This is again important for the study of SAP, which has begun to recognise the shortcomings of following pre-determined rules (Chia & Holt, 2023), which may no longer be fit for changing environments.

Third, play is a social activity (Perry, 1998) that individuals engage in voluntarily during their leisure time (Huizinga, 1950; Lehman & Witty, 1927) and it can also be spontaneous (Bjorklund & Gardiner, 2010). For play to be satisfying (and beneficial) for actors, a desire to play must be present (Howes, 2010). While the activity can be encouraged, it cannot be imposed otherwise play becomes a task and by nature, play is a voluntary activity that is freely pursued. The environment must also be supportive of play, as actors are unlikely to engage in play if their environment is under threat or their survival is at stake (Mainemelis & Ronson, 2006). The recognition that play can only take place under 'safe' conditions is thus a critical point of exploration as SAP studies have recognised that it is precisely during times of complexity and when faced with high-stakes decisions that the use of conventional tools and approaches is unfitting (Burke & Wolf, 2021; March, 2006). The paradox of addressing serious challenges in playful ways is therefore an important area of further research. Play studies have continued to argue that play is not a result of external factors (Millar, 1968), given that play is grounded in being intrinsically motivated. Yet, others have argued that the external environment needs be supportive of play, in other words, playfulness needs a playground (Ocasio et al., 2019). Play is consequently free but also limited, as it commences and concludes within limits of time and

space (Huizinga, 1950). Play is thus a captivating and all-consuming activity, free from organisation, structure and restraint (Piaget, 1945), which in turn allows play participants greater capacity to explore and create (Gray, 2018).

In sum, unpacking the make-up of play and the elements that are critical to realising play have shown how achieving feelings of pleasure are central to the activity, but they are not necessarily guaranteed. This pleasure can manifest itself in the form of laughter, surprise or anticipation. Given that play is freely undertaken without the presence of rules, it offers a unique opportunity for managers engaging in strategy-making to temporarily suspend their traditional practices and allow the emergence of new ideas to unfold and to enable managers the space to exercise their creative and imaginative ability (Singer & Singer, 1990). Having defined what play is alongside its key components, the next section will explore different perspectives of play that draw on emotion, materials and identity and how these historic perspectives can offer new insights when integrated into existing SAP research.

2.9 Perspectives of play

The following section of this literature review chapter will explore different perspectives of play, drawing on the work of psychologists Jean Piaget (1945) and Lev Vygotsky (1933), who offer contrasting but valuable perspectives of play. This section will review three key perspectives of play: symbolic play, pivot play, and identity play. In discussing the different play perspectives, this section will highlight areas of complementarity with strategy-making and in particular, underline the mechanisms that can help practitioners overcome the limits presented by procedural rationality and means-ends logic (Chia & Holt, 2023).

2.9.1 Symbolic play

Piaget (1945) explained how learning and development in children is supported by what he calls symbolic play. For Piaget (1945), play is extreme or pure assimilation, where behavioural techniques are repeated for the purposes of pleasure. He proposed how play provides scope for symbolic manipulations, which is important as actors replace the usual meanings associated with objects and actions with self-imposed meanings (Göncü & Gaskins, 2010; Henricks, 2018). Creating new meanings through symbolic play is valuable for SAP research as this enables organisational actors to diverge from the prevailing norms of adhering to established practices. Creating new understandings is important for managers and their

organisations as they need to adapt to changing environments. But SAP research has tended to fall short of unpacking how this can be achieved. Piaget's (1945) work on symbolic play starts to illuminate how new understandings can be cultivated. Using symbols can communicate "affective language" to express feelings, emotions and lived experiences as opposed to "intellectual language" to communicate objective thoughts (Piaget, 1945, p. 169). Indeed, the purpose of play is not to gain or express objective knowledge, rather to share and create a common understanding (Piaget, 1945). Given the nature of symbolic play, critics have argued that symbolic play "distorts reality" (Sutton-Smith, 1966, p. 109), which offers an inaccurate representation and conception of the world. Despite its criticisms, Piaget's (1945) work continues to hold prominence among play studies (Henricks, 2018) and helps us better understand the significance of symbolism and new meanings that can be generated through play.

Symbolic play is also associated with the role of materials and how play typically includes a diverse range of play equipment (Sutton-Smith, 1997). Actors who engage in play tend to bring in objects and material things. There is thus a creative entanglement between actors and the objects involved in play (Sicart, 2014). Fundamentally, play involves novel engagement with objects and exploring these materials through ludic interaction (Sicart, 2014), encouraging actors to unleash their creative ability (Bateson & Martin, 2013; Hunter, Jemielniak, & Postuła, 2010). While some materials such as Lego, soft toys and dolls are considered innately playful (Huang et al., 2022), any material can become an instrument of play (Sicart, 2014) as actors learn how to manipulate objects so that they become 'useful' (Bjorklund & Gardiner, 2010). Material play can thus lead to symbolic play and the creation of embodied metaphors, which can bring about shifts in practitioner mind-sets (Heracleous & Jacobs, 2008).

2.9.2 Pivot play

Vygotsky's (1933) work built on that of Piaget's but his work had stronger focus on action and interaction, rather than on thoughts (Henricks, 2018). In his research, Vygotsky (1933) critiques the theory of symbolic play as the overemphasis on the meaning of symbols would risk symbolic play generalising actual activity. Instead, play combines thought, meaning and actions where play serves as a mechanism to legitimise (and materialise) imagination by bringing thoughts into the real world through physical action (Elkonin, 2005; Vygotsky, 1933). In this regard, play serves as an instrument for change (Henricks, 2018) where objects and props (being used as part of play) serve as 'pivots' (Vygotsky, 1933). These pivots function as

symbols and have a different meaning in the mind of their users (Henricks, 2018). In contrast to Piaget (1945), Vygotsky's (1933) research has greater focus on action resulting from symbolism (rather than symbolism itself) and the impact from pivots in facilitating conversation between actors. The essence of pivots focuses on assigning meanings to objects and how actors use objects is determined by their thoughts and ideas, rather than on the innate properties of objects (Parker-Rees & Willan, 2006). Such contributions from play studies help to position play within SAP research and on the study of tools-in-use, where managers modify tools and materials and do not necessarily use them in the way they were intended (Jarzabkowski & Kaplan, 2015).

However, critics of this view argue that the theory of play leading to enhanced communicative skills lacks evidence (Sutton-Smith, 1997). Despite its criticisms, the concept of pivots holds promising value for the study of strategy-making, particularly in the context of workshops acting as liminal spaces where organisational actors can exercise their imaginative ability through pivots and these pivots can also support the communicating and sharing of new ideas (Henricks, 2018; Wood, 2009). Ultimately, both Vygotsky (1933) and Piaget (1945) support the view that play is about making sense of the activity (Göncü & Gaskins, 2010) and expressing their understanding through symbols and pivots. Play therefore serves as a medium to gain an understanding of their environment but affords the opportunity to exercise imagination.

2.9.3 Identity play

The final perspective of play, which will be summarised under the theme of identity play, will draw on Goffman's (1956) dramaturgical analysis and idea of impression management and how actors present themselves to the world. Goffman's (1956) work is important because it helps us to better understand how play can bring about different identities and in turn, new ideas and understandings. Dramaturgical analysis explores people as performers, who draw on impression management to present a different version of themselves depending on their audience (Goffman, 1956). In other words, actors have the ability to present a different identity depending on their context and other actors. This coincides with Monatgu's (1988) concept of psychosclerosis, or a hardening of the mind, where play begins to break down the exterior shell of actors, revealing a new identity. The concept of actors presenting different identities has also been referred to as 'generalized other' where individuals recognise who they are but will present a different version of themselves in different scenarios (Mead, 1964) and take on different roles. This is particularly relevant for advancing our understanding of how actors

engage in strategy-making as studies have already shown how embodied metaphors can bring about changes in practitioner mindsets (Heracleous & Jacobs, 2008). Yet, such studies tend to fall short of exploring the mechanisms that support actors in presenting different identities of themselves.

For Goffman (1956), the world is a stage and performers reside within establishments with fixed barriers and rules, which will shape the activity that takes place. Play can thus, act as a tool for actors to change identities and transform the performances that take place. Such transformations can give rise for new and imaginative possibilities, that the identity without play may have been unable to create. Play therefore serves as a frame for our identity and how we behave (Henricks, 2018), it shapes the language, mannerisms and mode of interaction and ultimately the outcome of the activity. Through changing identities, this may also impact the interactions between actors and also existing power dynamics. This coincides with Sutton-Smith's (1997) 'rhetorics' or narratives of play and the rhetoric of play as power, which explains that because players are focused on their intrinsic enjoyment, power dynamics have less of an influencing role (Sutton-Smith, 1997). Given that power dynamics feature less prominently during play, this may provide opportunity for actors to engage in bonding and function together more effectively in adulthood (Sutton-Smith, 1997). Changing power dynamics (even only temporarily) through play and presentation of new identities has the potential to advance our understanding of how strategic inclusion can be fostered that relies less on discursive capabilities and more on identities that are brought to surface through play.

Table 2.2: Summary of main themes within play research

Key theme	Main arguments and debates	Reference
Origins of play	People (and animals) are biologically designed to play	Byers (1984) Gray (2018)
	Play has its antecedents with object and tool use	Bjorklund & Gardiner (2010) Gray (2018)
Characteristics of play	Play is pursued for pleasure and enjoyment	Millar (1968) Piaget (1945) Van Vleet & Feeney (2015)
	Play is an autotelic activity	Csikszentmihaly (1975) Dweck, Elliot, & Hetherington (1983) Gray (2018)
	Play is a social activity	Huizinga (1950) Lehman & Witty (1927) Perry (1998)
Perspectives of play	Symbolic play - actors impose their own meanings to objects	(Göncü & Gaskins, 2010; Henricks, 2018) Piaget (1945)
	Pivot play – materials serve as pivots, which serve as a mechanism for change	Henricks, 2018 Parker-Rees & Willan, 2006 Vygotsky, 1933
	Identity play – people present a different version of themselves	Goffman's (1956) Henricks, 2018 Mead, 1964

2.10 March's sensible foolishness and play

The perspectives of play explained in the previous section pointed towards how the use of materials, symbols and different identities were brought about through play. These manifestations of play occur within given limits of time and space (Huizinga, 1950) as the act of play provides actors the opportunity to escape governing rules and structures (Piaget, 1945). The notion of 'escaping' ties closely with the work of March (1971, 1999, 2006), who maintained that normative theories of intelligent choice and the use of technologies of rationality can be sources of huge mistakes in complex situations. To mitigate the limitations of these prevailing theories, he proposed the concept of 'technologies of foolishness' to enable organisational actors to "temporarily suspend the operation of the system of reasoned intelligence" (March, 1971, p. 263) and "escape the logic of our reason" (March, 1971, p. 261). This next section will therefore unpack March's (1971) ideas of 'temporarily suspending' and 'escaping the logic of reason' and critically, how play can enable organisational actors to realise the value of 'suspending' and 'escaping' in the context of strategy-making.

Organisations pursue intelligence and in their pursuit, managers draw on different tools and materials (such as strategic planning) to make rational choices and these are otherwise referred to as technologies of rationality (March, 2006). These rational technologies form the basis for justifications of action and decision making (March, 2006). Recent studies (e.g. Pavićević & Keil, 2021) continue to focus on technologies of rationality in strategy and in strategic decision making, despite their limitations in aiding managers when they are faced with complex organisational challenges. To counter the limitations presented by technologies of rationality, March (2006) proposes technologies of foolishness. For March (1971), technologies of foolishness is a way to grapple with uncertain preferences and to discover new and more interesting goals. A technology of foolishness allows people to do things for which they have no good reason and sensible foolishness enables this means of experimentation (March, 1971). In particular, technologies of foolishness highlight the value of action and intuition in discovering new goals, rather than acting in accordance with pre-existing goals (March, 1971). In sum, the concept of technologies of foolishness is to provide organisational actors more flexible, explanatory and creative approaches to decision-making and goal-setting, especially in scenarios where the use of technologies of rationality are unsuited (March, 1971).

To realise technologies of foolishness, March (1971) proposes sensible foolishness, which has been put forward as an alternative to procedural rationality (Ocasio et al., 2019) and a mechanism to realise sensible foolishness is play (March, 1971). For March (2010), play is not a substitute of intelligence but rather a generative instrument of it. Sensible foolishness invites managers to challenge the dogma of pre-existing goals, explore possibilities of different rules and derive intelligence from experiences and practices that would typically be closed-off and ultimately develop more interesting wants (March, 1971). The act of being playful can therefore help individuals and organisations experiment and do things for which reason cannot understand (March, 1971). The notion of doing before thinking coincides with existing literature on purposive action (Bouty et al., 2019) and the idea of purposeful purposelessness, where action is consciously undertaken for no immediate purpose. Playfulness is the deliberate though temporary relaxation of rules that enable the exploration of alternate possibilities and ideas and is thus an instrument of intelligence, given its capacity to encourage actors to behave irrationally and foolishly for a transient time to explore alternate ideas (March, 1971).

The theoretical underpinnings behind March's (1971) sensible foolishness holds significant promise for the future of SAP research, though this phenomenon remains largely

underexplored within empirical SAP studies. By drawing on sensible foolishness and play to 'temporarily suspend' reasoned intelligence and rational thinking and 'escape' the logic of reason, this can offer novel theoretical contributions to the existing understanding of how managers strategise serious and complex organisational challenges and the process affordances (Burke & Wolf, 2021; Gibson, 1977) that arise from the interaction between play and reason. While play still remains on the fringes of management and organisation studies, a body of literature known as serious play has explored the idea of bringing play into strategy-making sessions. The following section will now review what serious play studies have uncovered about play and strategy and questions that remain unanswered.

2.11 The serious act play

At its core, serious play is the deliberate pursuit of playful and fun activities to achieve serious goals or objectives (Statler et al., 2011). Serious play, in contrast to play, is a goal-oriented activity whereas play is autotelic and intrinsically motivated (Csikszentmihalyi, 1975; Gray, 2018). Thus, it is the manner of interaction between actors that differentiates serious play from 'traditional' work-related practices as the interactions are intended to be playful and fun (Jacobs & Statler, 2006). This section will begin by providing an overview of what serious play is and then summarise what key serious play studies have found regarding the benefits of the processes. This section will then conclude with the dark side to serious play and what serious play studies have yet to unpack.

Serious play is defined as "a mode of activity that draws on the imagination, integrates cognitive, social and emotional dimensions of experience and intentionally brings the emergent benefits of play to bear on organizational challenges" (Roos et al., 2004, p. 563). Serious play can help create new meanings, allow for ambiguity and let purpose emerge rather than be predefined (Jacobs & Statler, 2006) through innovative thinking (Roos & Victor, 2018). Most serious play studies explore the phenomenon in strategy workshops or off-site retreats, where organisational members are (typically) provided with Lego bricks that they physically interact with to create physical representations of ideas (Roos & Victor, 2018; Roos et al., 2004; Statler & Oliver, 2008). The variety of objects can enable actors to draw on kinaesthetic knowledge when facing organizational challenges (Jacobs & Statler, 2006). To help reach maximum benefit from serious play, the process often involves warm-up exercises for participants to gain familiarity with the materials (Statler & Oliver, 2008). Serious play is also

a guided process, where there is typically a facilitator to help participants reflect and play effectively (Jacobs & Statler, 2006).

A wide range of benefits have been found when organisational actors engage in serious play. Beech, Burns, de Caestecker, MacIntosh, and MacLean (2004) showed how serious play can manage paradoxes and by keeping paradoxes open, organisational actors can realise creative action to transform problematic situations. Jacobs and Statler (2006) also advance the capacity of serious play to incorporate more creativity into strategy making, namely scenario planning practices. This heightened creativity can lead to more practical wisdom among leaders (Holliday, Statler, & Flanders, 2007). Bürgi and Roos (2003) uncovered how the multimodal nature of serious play that expanded beyond the verbal and visual can lead to a more concrete and deeper understanding of strategy. Roos and Victor (1999) explored how serious play can support imagination within a structured process and that serious play can help managers overcome the challenge of generating truly imaginative strategies. In their study, Bürgi et al. (2005) showed how strategy-making could be made more hands-on by involving construction activities to facilitate knowledge creation and meaning-making. More general findings of serious play studies focus on the improved cognitive and emotional experiences for participants (Roos et al., 2004) as well as creative problem solving (Statler et al., 2011) and how the construction and manipulation of metaphorical models can shape managerial strategic thinking (Statler, Jacobs, & Roos, 2008). Scholars have also found how serious play can minimise established power hierarchies (Statler & Oliver, 2008) and provide a safe context for emotional expression (Statler et al., 2011).

Despite the associated benefits with serious play, there is also a dark side to serious play, which has been touched upon by serious play scholars. For example, an initial challenge is overcoming the resistance to play and the view that play is seen as ‘bad’ (Statler et al., 2009), unproductive and pursued without a goal to achieve (Roos et al., 2004). While positive emotional benefits have been identified as an outcome from serious play, this is not always achieved and there may also be negative emotional reactions (Statler & Oliver, 2008). While most studies on play in the work place highlight the beneficial outcomes, the consequences, challenges and tensions have received far less research attention (Petelczyc, Capezio, Wang, Restubog, & Aquino, 2018).

In sum, from reviewing key serious play studies, it is apparent that scholars have already unpacked the benefits of bringing play into the workplace and into strategy making sessions.

However, these studies tend to be focused on outcomes and results, with much less research attention being paid to the process of serious play unfolding and the interplay between play and reason alongside tensions and challenges that arise during the process. Research on serious play thus provides the necessary foundations for this thesis, which aims to focus less on the outcomes arising from the incorporation of play into strategy-making sessions and more on the unfolding process and interplay between play and reason (Ocasio et al., 2019). Critically, this thesis aims to address the process of how actors temporarily suspend rational imperatives and escape their logic of reason, which March (1971) identified as an essential counterpart to the pursuit of organisational intelligence and to overcome the limitations presented by means-ends logic and procedural rationality.

2.12 Conclusion and research questions

In summation, the purpose of this chapter has been to condense and review what existing SAP studies have already informed us about the how managers actually strategise serious and complex challenges. Studies have begun to point towards 'irrational' modes of strategising that are 'purposefully purposeless' and do not necessarily conform to means-ends logic. What the literature has focused less on is the process by which actors can escape these rational imperatives and the confines of means-ends logic and goal-directed strategy. To help shed light on this, March's (1971) work on sensible foolishness and literature on play have been identified as promising avenues to help address shortcomings of rational-deliberate SAP studies. Sensible foolishness and play have been put forward as potentially powerful mechanisms to enable organisational actors to suspend rational imperatives and escape their logic of reason for a transient time. Studies on the interplay between play and reason are rare, and studies that do explore play in strategy work tend to remain outcome focused, seeking to unpack the benefits of the interaction between play and strategy.

Thus, a key question that remains to be addressed is the unfolding process of how the interplay between play and reason unfolds in the context of strategy-making, in particular, the tensions, challenges and conflicts that may arise from this interplay, which has also tended to be neglected. This thesis will therefore address the primary research questions below, after which, this thesis will move onto the research methodology chapter. The next chapter will explain in detail the research methods and empirical context that have been used to answer the proposed research question. The third chapter of this dissertation will also explain how

two further emerging research questions surfaced during the data analysis stage and how these emergent research questions complement the primary research question below.

1) How does the interplay between play and procedural rationality unfold in strategy workshops and help actors navigate strategic challenges?

CHAPTER 3:

METHODOLOGY

3.1 Introduction

This third chapter will detail the research methodology used to address the proposed research question, highlighted at the end of the literature review chapter. This chapter will consist of eight sections. First, I briefly go through my philosophical underpinnings with constructivism being the underlying paradigm within this study. Second, I will delineate my research methods, which fall under the umbrella of qualitative methods that encompass interpretive techniques in order to describe, decode and translate (Shah & Corley, 2006) the data into theoretical insights. I applied a longitudinal, interpretive case study approach (Eisenhardt, 1989) in order to unpack the micro interactions (Balogun, Huff, & Johnson, 2003) between participants as they practice play and reason. Third, I describe each of my case studies, all of which were SMEs based in the UK. Fourth, I explain the data collection process, which followed three phases: the pre-phase, the workshop phase and the post-phase. Data collection lasted approximately 11 months. Fifth, I will summarise the collected data sources. I collected interviews, observations and video and audio-recorded strategising episodes. Using multiple data allowed triangulation of the different sources and to ensure integrity of theory development (Guba & Lincoln, 2005). Sixth, I will discuss in detail the coding and data analysis process, where I adopted grounded theory so that the theoretical insights stemming from this research are rooted in the data (Glaser & Strauss, 1967). Seventh, I will provide an overview of how I established trustworthiness in this research. Finally, I will go through the ethical considerations and research limitations of this study. This chapter will conclude with a summary of the research methodology and outline the next chapter, which will detail the research findings.

3.2 Philosophical Orientation

To address the proposed research questions, I will briefly go through my ontological perspective (that is the theory of being) and my epistemological view (that is what we know about it). My view of the world falls under social constructionism or constructivism (Burrell & Morgan, 1979). According to this world view, actors invent and socially construct properties of the world (Kukla, 2013) and reality itself (Berger & Luckmann, 1971). Researchers adopting

constructivism recognise that actors create their own versions of reality and multiple realities can exist at any point in time in the minds of actors (Berger & Luckmann, 1971). Interpretative studies enable the researcher to gain insights about the phenomena being investigated (Burrell & Morgan, 1979). Given this, it is important for the interpretivist researcher to be able to gain close access to the lived experience of the research subjects (Lincoln & Guba, 1985), which often requires prolonged time in the field and interacting with the research participants (Creswell & Creswell, 2017). The subject within the research project is therefore someone who continuously constructs their own social reality (Denzin, 2001) and these research projects tend to focus on the interactions between the subject and their environment (Packer & Goicoechea, 2000). In this study, the research participants were in the process of navigating through their environments as they attempted to gain knowledge and understanding to craft out their organisational strategy.

In line with the constructivist view, this research unpacks how possible realities are constructed between actors and material artefacts (Giddens, 1976) through the interplay between play and reason during strategy-making. This interaction between actors and material objects supported actors in creating their own realities (Spencer, Pryce, & Walsh, 2014). Constructivism maintains open questions about how knowledge (and reality) are produced (Newton, Deetz, & Reed, 2011). Hence, by spending prolonged time in the field, I was able to uncover the process and interactions that emerged between actors and material objects that contributed to their understanding of strategic problems and possible realities to overcome these challenges. Within this research, I aim to reveal how the interplay between play and reason during strategy making offers valuable process affordances that support organisational actors in navigating through their strategic challenges. Through the constructivist approach, the aim is to achieve an understanding of organisational phenomena (Guba & Lincoln, 1994), in this research, it is the interplay between play and reason during strategy-making episodes. Relationships and experiences (Spencer et al., 2014) have been identified as vital components that enable knowledge and understanding to be constructed (Guzzini, 2005). Thus, I also conducted an in-depth exploration into how the relationships between actors may change when they engage in strategy-making using play and how potentially new dynamics within relationships can alter the crafting of organisational strategy.

3.3 Research Method

This section of the methodology chapter will explain why an in-depth case study approach was taken to address the proposed research question. The case study approach will permit the researcher to collect observations in real-time over a prolonged period in order to gain perspectives and insights from research subjects, as they construct their reality (Lincoln & Guba, 2003). This research method section will be split into three parts. First, I will go through the rationale of using case studies. Second, I will explain the justification for choosing SME organisations as part of this research. Third, I will briefly describe how I gained access to the three participating organisations, each of which served as a case study for this research.

3.3.1 A case study approach

I will draw on qualitative methods in order to provide descriptions of the phenomena and build theory (Van Maanen, 1979) that is grounded in the data (Gehman et al., 2017). One of the primary benefits of undertaking qualitative research, is that the researcher is able to discover new relationships and patterns, which can help explain complex phenomena (Shah & Corley, 2006) and how the research participants construct their realities (Berger & Luckmann, 1971). In this study I aimed to build theory from multiple case studies (Eisenhardt, 1989), which relies on constant comparison between theory and data (Glaser & Strauss, 1967) and the iteration between data collection and data analysis (Eisenhardt, 1989). A key advantage of the theory building approach from multiple case studies is the ability to generate novel theory (Eisenhardt, 1991).

The number of case studies can typically range up to ten (Eisenhardt, 1989) though studying ten cases would likely compromise the depth of the data. Hence, the choice to study three case studies is a pragmatic one, as this will still allow for a comparison between the studies and offer a degree of breadth (Balogun et al., 2003). It will also permit a thorough exploration of the research phenomenon in different settings, without compromising the depth of the data. Each of these case studies combined a range of data sources including interviews, observations (Eisenhardt, 1989), reflections and video and audio-recorded episodes (Heracleous & Jacobs, 2008) of strategy workshops.

As part of this research, I worked with three organisations, each of which served as a case study. Case studies were chosen because they have the capacity to provide rich empirical

descriptions of a particular phenomenon (Yin, 1994). Even though single-case studies have been cited as offering a rich description of the phenomenon (Siggelkow, 2007), multiple case studies are able to create more robust theory as the findings are more heavily grounded in the wide range of evidence (Eisenhardt & Graebner, 2007). The use of case studies are particularly appropriate when exploring new relationships (Gibbert, Ruigrok, & Wicki, 2008), in this case of this research, it is the interplay between play and reason during strategy-making and the process by which the interplay unfolds over time. Case studies also permit the researcher to illustrate abstract concepts in detail, which can provide the reader with powerful examples (Siggelkow, 2007). A challenge of case studies is that they do not permit for generalisations in the same way as research with large samples (Gibbert et al., 2008; Siggelkow, 2007). However, the purpose of this study is not to reach wide generalisability, but rather, to carefully unpack the process by which play and reason unfold in the context of strategy making.

Given that case studies allow for the researcher to explore how phenomena unfolds over time (Siggelkow, 2007), I adopted an ethnographic, longitudinal (11-month) study to investigate the micro-interactions between practitioners (Balogun et al., 2003; Balogun & Johnson, 2005) and how these interactions manifest in the context of play and reason and impact resulting strategy. This allowed me to obtain a holistic interpretation of events (Buehring, Cassell, Johnson, & Symon, 2006) and have a “close-up view” of pattens as they emerge and evolve over a continued period (Leonard-Barton, 1990, p. 248). Having long-term immersion in the field (Tracy, 2019) can permit deep gathering of data surrounding the unique circumstance of the organisations (Balogun et al., 2003). Conducting longitudinal research also allowed me to explore how past events impacted actions during the strategy workshops and consequential impact within organisations. The different data sources also enabled me to develop thick descriptions (Cunliffe, 2015) of practice over a prolonged period of time (rather than just looking at snapshots), which provides a more accurate illustrations of how organisational processes unfold (Pettigrew, 1990).

3.3.2 Research Setting: SMEs

For my research setting, I purposefully (Creswell & Creswell, 2017) selected SMEs based in the UK. SMEs have been defined as organisations comprising fewer than 250 employees (O’Regan & Ghobadian, 2004). The decision to conduct this research in the context of SMEs was underpinned by two main reasons. First, it has generally been regarded that particularly

in recent years and fuelled by the cost of living crisis, SMEs lack financial resources (Gordon, 2023) and also the capabilities (e.g. training and skills development) to allow these organisations to grow (Hoque & Bacon, 2008). As detailed in the Enterprise Research Centre (2022) report, one third of these small businesses experienced a threat to their survival within the last five years. Research has found that in order to respond to surprise and change (Bechky & Okhuysen, 2011), organisations need to have resources and the ability to respond to change, which SMEs struggle to possess. Altogether, SMEs face greater uncertainty regarding future challenges and threats. For example, the COVID-19 pandemic heavily impacted SME with company dissolutions and one in five small firms having to adopt entirely new business models (WBS, 2024). SMEs are therefore comparatively at a disadvantage when faced with challenges presented by complex and uncertain environments in terms of strategic planning and growth (Poutziouris & Sitorus, 2000). Second, SMEs offer a rich empirical setting to conduct longitudinal research. Research has called for more in-depth qualitative research to be conducted within SMEs (O'Regan & Ghobadian, 2004) to uncover the interactions between practitioners, which can be subtle and also complex (Curran & Blackburn, 2000).

3.3.3 Seeking access

In seeking out research participants, I first developed a research flyer (appendix 1), to advertise to participants what to expect from the study and the practical benefits of participating. The research flyer communicated key information about the research study including background of the research, purposes of the study and intended benefits for the participants and their organisations. I then reached out to my personal network, who had connections with practitioners and small business leaders. These connections kindly agreed to circulate and advertise my research flyer with their professional network of practitioners. Interested participants contacted me via email, which was the point of contact advertised on the research flyer. From then, an initial telephone or virtual call via MS Teams was arranged with the prospective participants, where I would provide them with more information about participation in the research project. This initial call also provided prospective participants with the opportunity to ask any questions they had about the research study. When participants confirmed they would like their business to participate in the research, they were emailed the Participant Information Sheet alongside the Participant Consent Form, which participants signed and sent to me via email, to confirm their voluntary participation in the study.

3.4 Case Description

I will now go through a case description for each of the participating organisations. All names of businesses and business participants used in this thesis are pseudonyms, to ensure business and participant anonymity (Tracy, 2019). The first organisation, Rubix, deliver coding and robotics courses to children aged eight to sixteen. All the preparation and delivery of teaching material is undertaken by the Rubix team. The second organisation, Capricorn, deliver workshops primarily to schools (both primary and secondary). These workshops are centred on tackling violence, hate crime and extremism. The final organisation, Blueberry, deliver training programmes and mentoring schemes to support (typically small and) growing businesses. These programmes are varied and can range from gaining sustainability knowledge to tactics to scale-up businesses. A summary of the participating organisations and organisational members is summarised in Table 3.1 and I will now provide a more detailed description of each of the participating businesses.

Table 3.1: Summary of research participants

Organisation	Organisational member	Role in the business	No. interviews pre-workshop	No. interviews post-workshop
Rubix	Kylo	Co-Managing director	2	1
	Amir	Co-Managing director	1	-
	Adam	Process lead	1	1
	Tam	Content creator	1	1
	Henry	Content creator	1	-
	Jane	Placement student	1	-
Capricorn	Zena	Co-founder	1	1
	Lois	Co-founder	1	1
	Claire	Head of programmes	1	1
Blueberry	Daemon	CEO	1	1
	Oli	COO	1	-
	Mila	Sustainability lead	1	1

3.4.1 Rubix

Rubix deliver coding and robotics courses to primary and secondary school children. The premise of their business is that the children to come to their learning centre where members of Rubix teach and deliver the courses. Observations began in November 2022 and concluded in July 2023. At the start of November 2022, Rubix were targeting schools to deliver coding and robotics classes as well as organisations to sell robotics devices. Rubix swiftly moved away from this strategy and in January 2023, Rubix were dedicated to delivering coding and

robotics classes to students in their centre. These created challenges relating to how Rubix would attract children (and their parents) to come to their centre and ultimately pay for the classes. The phrase of how to get “bums on seats” was frequently mentioned during team meetings, indicating the desire to have a continuation of students attending Rubix classes. Upon observing team meetings, there appeared to be tensions between Kylo and Adam relating to workload and communication of tasks. Observational data also revealed frustrations from team members regarding what they felt was a slow growth of the business.

Kylo is the managing director of Rubix and crafts the organisational strategy and assigns tasks to the rest of the team. Amir is the co-managing director alongside Kylo, though Amir is largely absent from the day-to-day running of the business. Amir is also based abroad and being away from the centre contributes to his sometimes lack of involvement in Rubix and the future direction of the business. The topic of Amir’s involvement sometimes arises during conversation in team meetings and Kylo has expressed a desire for Amir to be more hands-on in the running of the business. Henry and Tam work as content developers, where they design and create all coding and robotics courses and they also deliver the coding and robotics courses to students as well. Designing the teaching content in-house is a key point of differentiation for Rubix, as their competitors typically use content that can be purchased online. Finally, Adam delivers the courses alongside Henry and Tam, but he also works closely with Kylo in ensuring the day-to-day running of the business. Kylo, Adam and Tam are also brothers, which at times created communicative challenges between them, more so compared to when the discussion involved either Tam or Jane.

3.4.2 Capricorn

Capricorn’s core business focuses on workshop delivery to students in schools and the workshops centre on preventing violence, hate crime and extremism. A small proportion of these workshops are also delivered to adults in various sectors. Observations began in December 2022 and concluded in August 2023. During these observations, Zena and Lois made apparent their desire to diversify Capricorn’s business offerings away from solely pursuing workshop delivery in schools. This was due to Zena and Lois’ sentiment of vulnerability, being reliant on the public sector as their predominant source of funding. The wider Capricorn team (with the exclusion of the co-founders) either work part-time or are employed on a consultancy plan. Zena and Lois find themselves frequently engaging in the day-to-day running of the business, such as calling schools, booking accommodation and

travel for facilitators and responding to email queries. Given this, Zena and Lois feel they are unable to expand beyond workshop delivery in schools as they remain tied down to the mundane tasks at Capricorn.

As co-founders of the business, Zena and Lois revealed in their interviews how their role entails driving the strategic direction of Capricorn, applying for bids and grants for funding and managing the operations of the business. Both co-founders also shared their dissatisfaction with being “very much involved in the operational elements of the business” and the day-to-day running of Capricorn. Claire is the Head of Programmes and works closely with Capricorn’s facilitators including Michael and Jace, to deliver workshops in schools. Liz is Head of Research and also an Emeritus Professor at a university. She brings her knowledge of education and extremism to inform the content of the workshops. Geralt is employed part time undertake the administrative duties at Capricorn, though Zena and Lois still find themselves too involved in the administrative side of the business.

3.4.3 Blueberry

Blueberry deliver workshops and training programmes, which are designed to support entrepreneurs and small businesses. The observation process began in January 2023 and concluded in August 2023. The core team at Blueberry comprise three members: Daemon, Oli and Mila and the wider team consist of mentors who are employed on contract plans to support the entrepreneurs involved with Blueberry. Daemon, Oli and Mila draw on their own experiences and knowledge to design programmes to deliver to clients. Blueberry recognise there are other larger institutions clients can approach, that offer similar programmes and workshops. For Blueberry, they differentiate their business by designing their content in-house and being highly dynamic. For instance, as the sustainability project lead, Mila designs and delivers programmes focused on sustainability. She draws on her own knowledge, experiences and keeps up-to date with the research field. She is also able to rapidly incorporate any sustainability policy changes into her workshops, within a week of any policy changes. By comparison, Blueberry’s competitors are not as dynamic and may continue to deliver programmes which may outdated. The courses are delivered remotely, and this is a purposeful choice made by Blueberry, so that they are not restricted to clients in proximity and can target broader regions. However, the community of entrepreneurs Blueberry intend to serve and support is located close to where Blueberry’s office space is positioned. This office space is accessible to Blueberry’s entrepreneurs to collaborate and learn from each other.

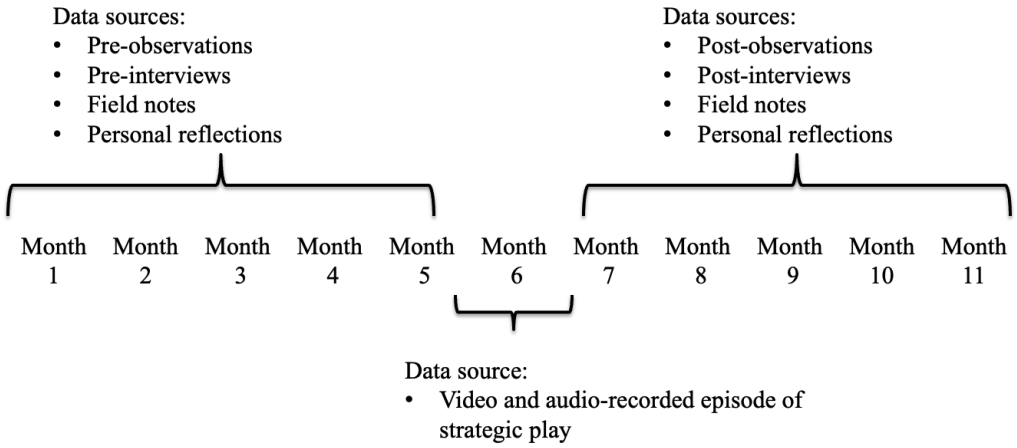
Hence, geographical limitations present a further challenge to Blueberry, given that the choice to target entrepreneurs located within proximity to Blueberry's office space.

As part of the observation phase, it became apparent that Blueberry were experiencing and uneven flow of incoming projects, which was problematic for the team in terms of incoming finances and also feelings of being "engaged and then being unengaged". Given this uneven flow, Daemon began accepting incoming projects for the purposes of generating cash, rather than due to their alignment with Blueberry's mission, that is to support a develop their community of entrepreneurs. The drift from Blueberry's mission was expressed by both Mila and Oli during their pre-workshop interviews and ultimately culminated in Oli leaving the business.

3.5 Data collection

Once participants had been recruited, I spent prolonged time in the field (Jarzabkowski, 2008) and data collection lasted approximately 11 months and began in November 2022 and concluded in August 2023. Data for each of the participating organisations was collected in parallel. For all three businesses, data collection ceased when I felt theoretical saturation had been reached and that no further insights would be revealed (Glaser & Strauss, 1967). Collecting qualitative data has been described as "asking, watching and reviewing" (Wolcott, 1992, p. 19) where the observations and recorded workshops enabled me to gain a close-up perspective of how strategising unfolds by zooming in on the sociomaterial interactions. The interviews also provided me the opportunity to gain deeper insight into participant perspectives. The duration of the data collection for all three business followed a three-stage process, which is summarised in figure 3.1 and provides an approximate timeline for the data collection. The process of data collection comprised three phases, which I refer to as the pre-phase, the workshop phase and the post-phase and I will discuss each phase in turn.

Figure 3.1: Timeline for data collection



3.5.1 Pre-phase

I refer to phase 1 of data collection as the 'pre-phase', which lasted approximately five months and this involved conducting pre-interviews and pre-observations. This stage was vital to allow me to gain an understanding of the participants, their organisation and organisational routines (Feldman & Orlikowski, 2011). I began this phase of data collection sitting in on strategy and team meetings that took place either on-site in participant offices or occasionally online using virtual platforms such as Google Meets. Observing these pre-meetings served two purposes. First, they provided me with the opportunity to understand the nature of the challenges that were facing the organisation. Second, these pre-meetings helped me understand participant's current practices and routines and the nature of their interaction during strategy-making. The pre-interviews helped me gain understanding of organisational member's current challenges they were experiencing and gain insight into their perspectives and identity within the business (Balogun, Beech, & Johnson, 2015). During the pre-phase, reflections after interviews and observations were made to create a chronological diary of events that occurred over the course of data collection. There were a total of ten collected interviews from Rubix, six from Capricorn and five from Blueberry.

3.5.2 Workshop phase

Once I felt I had a solid understanding of the organisation's current position and present challenges, phase 2 of data collection commenced, which I refer to as the 'workshop phase'

where participants attended a facilitated workshop that would be audio and video-recorded (Heracleous & Jacobs, 2008; Paroutis et al., 2015). One strategy workshop took place for each case organisation. During this phase, each organisation attended a workshop that would be guided by a facilitator (Roos & Victor, 2018). The facilitator was a member of my supervisory team who kindly offered to facilitate the workshops so that I could maintain my position as a participant observer. The purpose of the workshop for the participants was to navigate through their organisational challenges with 'different approaches' to what they were familiar with. From my perspective as a researcher, the episodes allowed for an in-depth exploration of the sociomaterial interactions that arise from practicing play and reason.

The strategy workshops took place outside of participant offices to help foster a 'not-at-work mindset' and to create the 'mood of play' (Roos et al., 2004). An image of the room set-up for the workshop can be found in appendix 2. For each of the workshops, organisational members were provided with a wide range of toys including Lego bricks, building blocks, Play Doh, animal figures and connecting pipes. The facilitator and myself were present at each of the workshops. The purpose of the facilitator was to guide the participants through the workshop and prompted them to keep to time allocations as well as encouraging them to play with the materials when the participants seemed reluctant to do so. As the participant observer, I distanced myself from the participants and sat in a corner, writing down immediate reflections and took field notes. For Rubix, there were four attendees (Kylo, Adam, Henry and Jane). For Capricorn, there were three attendees (Zena, Lois and Claire). For Blueberry, there were two attendees (Daemon and Mila).

Each of the workshops lasted approximately four hours in length, which was dictated by the time availability of research participants. The workshops were (loosely) structured around strategic challenges that had been observed during the pre-phase and organisational members were tasked with navigating through these challenges through play, in a similar fashion to previous serious play studies (e.g. Roos et al., 2004). This was an intentionally loose structure as the creative and hands-on nature of the workshop was designed for participants to self-direct the progression of the workshop in line discussions and debates that emerged. In other words, there was no pre-determined goal to achieve and the participants were exploring strategy through play and 'knowing as [they] go' (Chia, 2017), which is a differentiating factor of this research and serious play studies. Serious play has been defined as being goal-directed (Statler et al., 2011) whereas play as no ends to achieve and this is what participants were encouraged to do by the facilitator during the workshops. Participants

had no pre-defined goal and instead, used the workshop as a space to navigate, explore and unpack their organisational challenges using practices of play and reason. The facilitator began by introducing the workshop and time allocations to focus on each of the challenges and encouraged participants to let their physical action guide thought, to 'not think too much' and to physically represent their ideas and feelings through the materials.

3.5.3 Post-phase

After the workshop had taken place, I progressed onto the final phase of data collection, which I refer to as the 'post-phase' and this mirrored the pre-phase and involved post- workshop interviews and observations. The post-phase of data collection served two purposes. First, I resumed observations of strategy and team meetings to uncover whether insights generated from the workshop were translated into organisational strategy. Second, whether actions of play manifested outside the walls of the strategy workshop into participant's organisational setting. The post-interviews were a valuable data source to gather the reflections of participants and to uncover in detail the meaning behind specific activities (Smets, Morris, & Greenwood, 2012) from the workshop.

3.6 Data sources

"Like all good qualitative research, we employ multiple data sources" (Gioia, Corley, & Hamilton, 2013, p. 20) and as part of this research study, there were three data sources: observations, video and audio-recorded strategy workshops and interviews. A summary of the complete data set can be found in table 3.2. It was necessary to video and audio-record the workshops in order to zoom in and uncover the micro-interactions between practitioners that arose when participants practiced play and reason, which would have been impossible to gather without video recordings. Together with interviews and observations, this qualitative data set proved central to advancing our understanding of SAP (Abdallah & Langley, 2014) together with play during strategy-making episodes. Having a multiple data set will allow for triangulation and more dependable (Denzin, 1978) research findings, to help ensure integrity of the developed theory and analysis (Guba & Lincoln, 2005).

Table 3.2: Summary of data set

Rubix		Capricorn		Blueberry		Total
No. semi-structured interviews						
Phase 1: 7	Phase 3: 3	Phase 1: 3	Phase 3: 3	Phase 1: 3	Phase 3: 2	21
Hours of observations						
Phase 1: 11	Phase 3: 8.5	Phase 1: 18.5	Phase 3: 6.5	Phase 1: 2	Phase 3: 3	49.5
Hours of video and audio-recordings (Phase 2)						
4		4		3		11

Throughout data collection, I remained a participant observer (Howard-Grenville, 2007). For this research, I positioned myself in-between participant-as-observer and observer-as-participant as the former may spend more time acting as a participant rather than observing (Gold, 2006), which is unfitting for this study. On the other hand, the latter relies on formal encounters and only has brief and superficial encounters with participants (Gold, 2006), which is also unsuitable. Indeed, almost all forms of social research draw on participant observation, as one cannot study the social world without becoming part of that world (Hammersley & Atkinson, 1983).

As a participant observer, I "[established] a place in some natural setting on a relatively long-term basis in order to investigate, experience and represent the social life and social processes that occur in that setting" (Emerson, Fretz, & Shaw, 2011, p. 352). By spending prolonged time in the field, I grasped "how everyday behaviour in organizations creates strategic choices and consequences" (Balogun et al., 2003, p. 197). Throughout the data collection process, the level of engagement with participants depended on what participants permitted including the frequency and type of meetings I observed. I observed as much as I was permitted to do so. The following section will now detail the three sources of data used in this research: observations, video and audio-recorded strategy episodes and interviews.

3.6.1 Observations

Observational data can be broken down into pre-observations (undertaken before the workshop) and post-observations (undertaken after the workshop). These observations allowed me to capture first-hand the doing of strategy and the practices and materials participants relied on in order to engage in strategy-making (Langley & Abdallah, 2011), I began data collection by sitting in on team and/or strategy meetings. The pre-observations were vital to allow for familiarity with participants and their practices (Emerson et al., 2011)

and helped build rapport (Creswell & Creswell, 2017). The initial observations were at times a little difficult to understand (Geiger, Danner-Schröder, & Kremser, 2020) and so I clarified any questions I had after the observation by speaking to managers, who in fact invited me to ask them questions after each meeting I observed. The primary purpose of the pre-observations was to gauge the strategic issues being faced by each organisation, which helped deepen my understanding (Farny, Kibler, & Down, 2018) of the business.

During the post-observations, I continued to take detailed notes (Jarzabkowski, 2008) and wrote down all impressions that occurred, rather than deciding to only write what may seem important (Eisenhardt, 1989) at the time, to minimise the risk of missing any valuable insights. The post-observations were vital in allowing me to capture whether ideas generated from the workshop made their way back into the organisation and whether there were any changes in participant interactions during post-workshop meetings. After each day in the field, I rewrote my notes and recorded my overall experiences and reflections (Glaser, 2017). Notes and reflections after every meeting were compiled to produce thirty single-spaced pages of ethnographic field notes (Emerson et al., 2011). My personal reflections included the physical setting in which the observation occurred, activities and interactions between participants, conversations that occurred and subtle factors such as nonverbal communication (Merriam & Tisdell, 2015). My own involvement in the case setting (Dyer & Wilkins, 1991) helped provide contextual detail that fed into the creation of vignettes to convey my lived experience (Jarzabkowski, Bednarek, & Lê, 2014) of 'being there' and to also offer the reader a more comprehensive understanding.

The use of observations has been criticised due to its subjective nature, thus rendering observational data as being unreliable (Merriam & Tisdell, 2015). To help overcome this limitation, I asked participants to clarify their positions during the interviews to ensure I had an accurate understanding. Another limitation of observational methods is that the researcher may not be equipped with the necessary skills to effectively observe participants (Creswell & Creswell, 2017). To minimise this risk, I made sure to write down all my interpretations and observations and not solely the ones I deem to be valuable at the time (Glaser, 2017).

3.6.2 Video and audio-recorded episodes

After I had undertaken pre-observations and pre-interviews, participants were invited to attend a 'facilitated strategy workshop' where they would navigate and tackle their organisational

challenges using ‘creative’ and ‘novel’ approaches. In line with the PIS, participants were aware that they would attend a facilitated workshop with myself as the observer and a facilitator present. They were also made aware of the hands-on and creative nature of the workshop, but they were not informed that they would be engaging in play. This was so I could capture the (expected) initial hesitancy, reluctance and uncertainty of participants through the video recordings and their immediate reactions to play. Two of the strategy workshops lasted four hours in length and one workshop lasted three hours in length. The duration of these workshops was sufficient to allow me time to observe in detail and zoom in on the sociomaterial interactions between actors (Lincoln & Guba, 1985) as they practiced play and reason. The duration of the workshop was based on participant availability and previous serious play studies, where serious play workshops also lasted for approximately half a day (Roos et al., 2004). I designed and planned the running of the workshop and communicated this with the facilitator ahead of each workshop. By separating myself from the role of facilitation, this permitted me to continue to act as a participant observer (Glaser, 2017).

The strategic play workshop served both theoretical and practical purposes. Firstly, and from a theoretical standpoint, to advance our understanding of the interplay between play and reason when strategising organisational challenges. While serious play studies have found a range of practical benefits such as enhanced creative and problem-solving ability (e.g. Heracleous & Jacobs, 2008; Petelczyc et al., 2018; Rieber et al., 1998), these studies fail to inform us about the process by which play and reason unfold in practice. In particular, we still know little about the process how actors escape the logic of reason and temporarily suspend rational imperatives, as put forward by March (1971). Secondly, and from a practical perspective, it was anticipated that the oscillation between play and reason would provide participants with a new means to tackle organisational challenges and allow unintended process affordances (Burke & Wolf, 2021; Gibson, 1977) to emerge that will further support participants in uncovering new approaches to strategising that are not based on the conventional means-ends logic (Chia & Holt, 2023).

The using of video and audio-recorded strategy workshops as a data source aligns with the growing call to use videos as a means to capture strategy practices as they unfold (Dameron et al., 2015; Johnson et al., 2007). Video recordings illuminate how interactions occur and enable actors to share and create knowledge (Paroutis et al., 2015). The minute details including bodily and spatial cues that video-recordings can showcase would likely be missed if conducted using real-time observation alone (Smets, Burke, Jarzabkowski, & Spee, 2014).

The recorded data also offered a prime opportunity to capture the affordances (Hutchby, 2001) that surface during the interaction between play and reason and how the two opposing practices progressed during strategy making sessions. Thus, video-recordings were essential for this research project.

3.6.3 Interviews

In similar vein to the observational data, the interviews took place during the pre and post-phase of data collection. The interviews all took place virtually, either using Microsoft Teams or through a telephone call. Microsoft Teams was the preferred approach, as I was able to see the participant and their facial cues. However, on occasion when there were technical difficulties or when the participant requested to speak over the phone, this is when the interview took place through a telephone call (Brinkmann, 2014). The interviews provided me the opportunity to understand the meaning behind specific activities (Smets et al., 2012) alongside participant perspectives (Shah & Corley, 2006).

All interviews were semi-structured and I began with broader questions before becoming more specific (Smets, Jarzabkowski, Burke, & Spee, 2015) and I prepared a list of guiding questions (Merriam & Tisdell, 2015) ahead of the interviews. An example guide for interview questions for the pre-interview can be found in appendix 3 and an example guide for interview questions for the post-interview can be found in appendix 4. During the interviews, I made sure to avoid imposing constructs to allow for a more accurate representation of the interviewee's opinion, to help ensure rich opportunity for new discoveries (Gioia et al., 2013). In order to retain the interview content for subsequent analysis (Merriam & Tisdell, 2015) the interviews were all recorded and transcribed (with the exception of two interviews) with participant consent. For the two interviews that were not recorded, I made sure to repeat back my notes to the participants so that they could confirm accuracy in my understanding.

The purpose of the pre and post-interviews (Corley & Gioia, 2004) was to gather information about participants alongside their thoughts and reflections, in order to "flesh out details about how and why" particular actions took place (Jarzabkowski, Lê, & Balogun, 2019, p. 857). The interviews also allowed me to ask about participant perceptions, feelings and opinions that cannot be observed directly (Patton, 1990). I made sure to interview managers as well as non-managers to help limit bias from the interview data (Eisenhardt & Graebner, 2007). Specifically, the pre-interviews were centred on understanding the current perspectives of

participants and their opinions regarding organisational strategy. The post-interviews were centred on gathering reflections and insights from participants regarding the workshop and uncovering the meaning behind particular actions.

3.7 Coding and data Analysis

Adhering to the constructivist view, I adopted an inductive mode of theory development (Pouliot, 2007). However, a number of qualitative studies typically use the term 'inductive' as a general term for theory development, which has been criticised for a lack of specificity (Graebner, Martin, & Roundy, 2012). Hence, this research applied an iterative-inductive approach to theory development (Paroutis et al., 2015) where I circled back and forth between theory and data (Farny et al., 2018; Locke, 2000), to develop theoretical knowledge (Orton, 1997) from the "bottom-up" (Cunliffe, 2015, p. 436). In particular, I focused on prioritising novelty (Corley, Bansal, & Yu, 2020) so I went into the field without any prior commitments so as to discover new insights as they emerge (Lincoln & Guba, 1985).

In line with the bottom-up discovery approach, I applied grounded theory, where data is collected and analysed simultaneously (Glaser & Strauss, 1967) and there is a constant comparison between theory and the data (Suddaby, 2006). Grounded theory is based upon transforming raw data into new theory through coding and analysis (Suddaby, 2006; Turner, 1982). In other words, "in grounded theory we do not know, until it emerges" (Glaser, 1992, p. 95). Hence, by adopting the grounded-theory approach, this paved the way for unexpected findings to emerge that extended beyond the scope of the intended research question. Thus, two further supplementary research questions were presented that explore how the interplay between play and reason influences the role of power dynamics and sharing of tacitness during strategy making. Given the exploratory nature of the initial research question, I aimed to discover new processes and modes of interaction between actors (Suddaby, 2006) and tied these to existing studies about a given phenomena (Golden-Biddle & Locke, 2006). Hence, grounded theory is the most suitable approach for this research.

The analysis process aimed to develop credible theoretical inferences to connect the empirical data with existing contributions in the literature and ultimately develop new theoretical insights (Jarzabkowski et al., 2019). The data was organised on an NVivo database, which allowed for an efficient codification of the collected data (Smets et al., 2015) and help reduce the enormity of the data down to a more manageable size (Crofts & Bisman, 2010). The choice to use

NVivo is a pragmatic one, given Aston University possesses a license for the software and utilising software like Nvivo, can support the coding and analysis stage (Wright, Meyer, Reay, & Staggs, 2021). During the coding and data analysis stage, I made sure to be aware of theoretical sensitivity (Glaser, 1978) and so I focused on the sociomaterial interactions that were highlighted from the video data. The analysis unfolded in three main stages as I circled between data and emerging insights to develop a thick description (Langley, 1999) of how practices of play and reason interact and unfold over time. I will go through each of these stages in the following sub-sections.

3.7.1 Developing a landscape of interactions

Analysis began during the pre-phase, where managers organised team meetings to go through targets, goals and objectives for the business. These meetings also served as an opportunity for the wider team to 'catch-up' with the work they had been doing. I paid close attention to the tools actors relied upon when conducting these meetings. For example, Capricorn's co-founders always came with a prepared PowerPoint slide deck, that set out the structure for the meeting. Blueberry's meetings were centred around their management software: Monday.com and Rubix came with their laptops. During the pre-observations, the sociomaterial interactions e.g. tone of voice, bodily gestures, eye contact, reliance on supporting tools, how tools influenced direction of conversation, and any evidence of playfulness and how this manifested were closely observed and recorded through field notes (appendix 5). This step allowed me to capture practices of reason and rationality as they took place in their natural setting and I observed how 'differences of opinion' began to emerge when discussing the future of the organisation and how the 'practical relevance of ideas' is also questioned.

I continued with this approach during the workshop phase and post-phase of data collection. The first time I re-watched the recordings, I added to my existing field notes and wrote down reflections of what I found particularly insightful, novel and interesting. For example, actors seemed to 'let their guard down' as they continued to engage in play, and this was evidenced through actors engaging in casual banter with each other. The second time I rewatched the recordings, I watched the videos without audio. This was so that I could focus directly on the bodily and material interactions (Dameron et al., 2015). Here, I took notes on the bodily gestures of actors e.g. the movement of their bodies, when they were smiling and where the participants were looking. Altogether, these field notes and reflections allowed me to create a

landscape of interactions across the different phases of data collection. At this point, my personal reflections and field-notes were recorded on Microsoft Word, where I essentially undertook open-coding to develop initial concepts (Strauss & Corbin, 1990) began to emerge from the landscape of interactions.

3.7.2 Identifying emerging themes

The second stage in analysis involved identifying emerging themes that came to surface when actors engaged in practices of play and reason. For example, the video-recordings revealed how actors gradually let down their guard and shared 'suppressed points of view' that they previously kept hidden during the pre-phase. Descriptions also captured the involvement of the body and how materials were brought to life as organisational members became 'liberated' and set themselves free with a 'not-at-work mindset'. During this stage, I fed the data from observations, interviews and descriptions from the video-recordings into Nvivo (appendix 6) to create a database (Reinecke & Ansari, 2021). I subsequently coded the interactions and sociomaterial manifestations into themes e.g. 'practices of logic and reason' and 'practices of play and foolishness' that emerged over the course of the strategy episodes. The patterns that emerged from the sociomaterial manifestations formed a further theme, the 'evolving fluidity', which captured the increasing comfort from participants as they continued to engage in play through the strategy workshop.

At this point of data analysis, I critically reflected on the reduction process by asking two questions: "Is this code similar to that code?" and "Are these codes different to those codes?" (Jarzabkowski, 2008, p. 626). This critical reflection also helped to avoid the coding trap of creating needless codes (Davidson & Skinner, 2010). While I grouped the data into various themes, I referred back to existing literature (Cunliffe, 2015), in particular the work of March (1971) and questioned whether these themes I created were helping to explain the phenomena of interest (Gioia et al., 2013) that is, the interplay between play and reason and how this process unfolds during strategy-making.

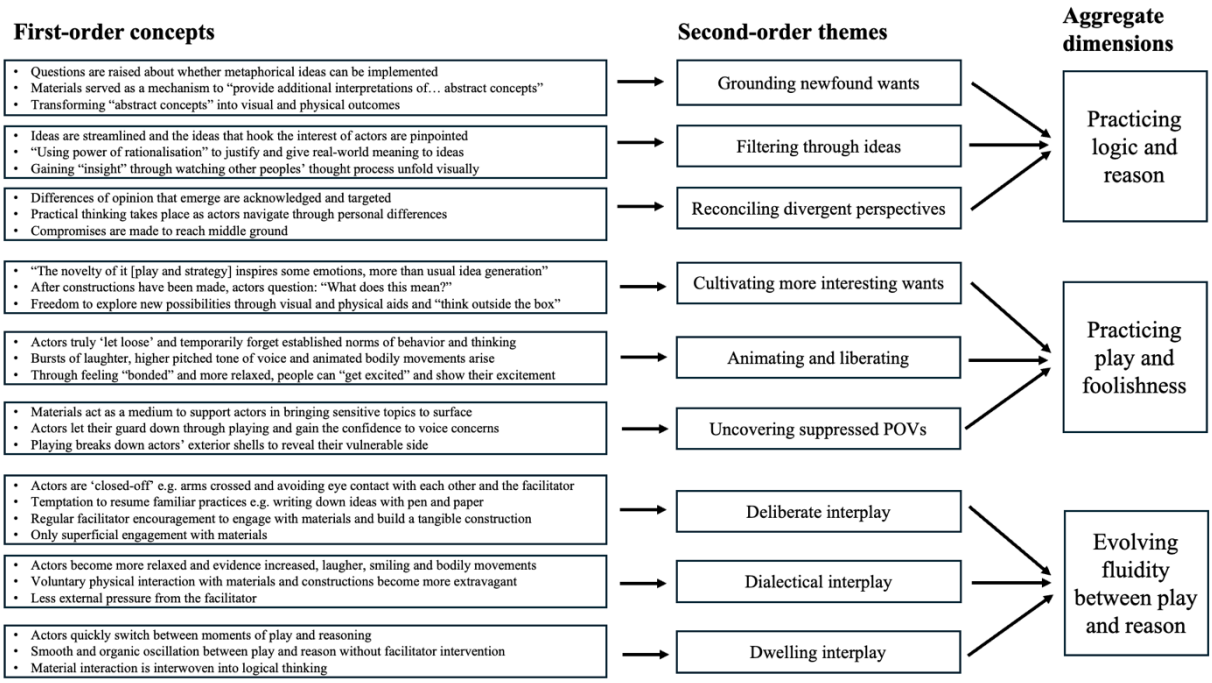
3.7.3 Making connections between play and reason

Throughout coding and data analysis, I reviewed existing literature and in particular, March's (1971) work on sensible foolishness. His ideas of 'escaping' and 'suspending' proved critical

in the analytical process of unpacking the interplay between play and reason. For March (1971) playfulness is not intended to permanently supplant rational decision making, rather, it is a necessary accompaniment. With this notion in mind, I went back to the data and zoomed in on the sociomaterial interactions that contributed to the process of 'escaping' and 'suspending' rational imperatives and how this took form in the context of strategy workshops. For example, in my personal reflections I wrote down that organisational members would make their bodies more dynamic and engage in more sarcastic and humorous dialogue, which created a springboard for actors to bounce ideas off each other as they literally felt and sensed their way through strategy using the toys. Field notes also showed how the materials supported actors as they revealed personal sentiments and the sharing of tacitness. During this final stage of data analysis, I carefully considered how existing themes related to the prevailing literature and could advance our understanding of play in strategy. This comparison resulted in the creation of aggregate dimensions (Boghossian & David, 2021) that formed the basis of my three findings chapters.

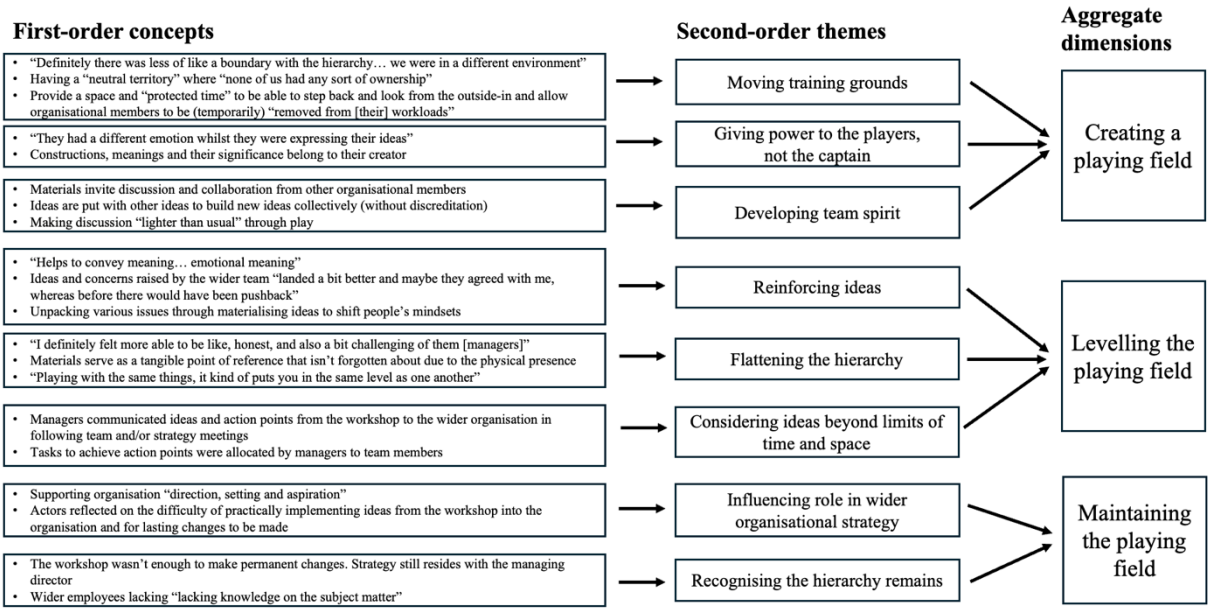
Data structure A in figure 3.2 showcases my three-tiered data structure (Gioia et al., 2013). This coding structure in figure 3.2 looks to address the intended research question, which asks how the interplay between play and reason unfold in strategy workshops. In particular, the second-order themes of deliberate, dialectical and dwelling interplay illustrate the progression of how actors escape into play. These themes are grounded in existing studies, where dialectical interplay draws on the concept of dialectics, that showcase how change and value emerge from the struggle of opposites (Gottlieb, 1972). Moreover, the theme of dwelling interplay draws on Chia and Holt's (2006) concept of the dwelling worldview, where actors respond intuitively to cues and their environment. Taken together, the coding structure in figure 3.2 speaks to the intended research question and summarises how the interplay unfolds through the three key themes of deliberate, dialectical and dwelling interplay.

Figure 3.2: Data structure A



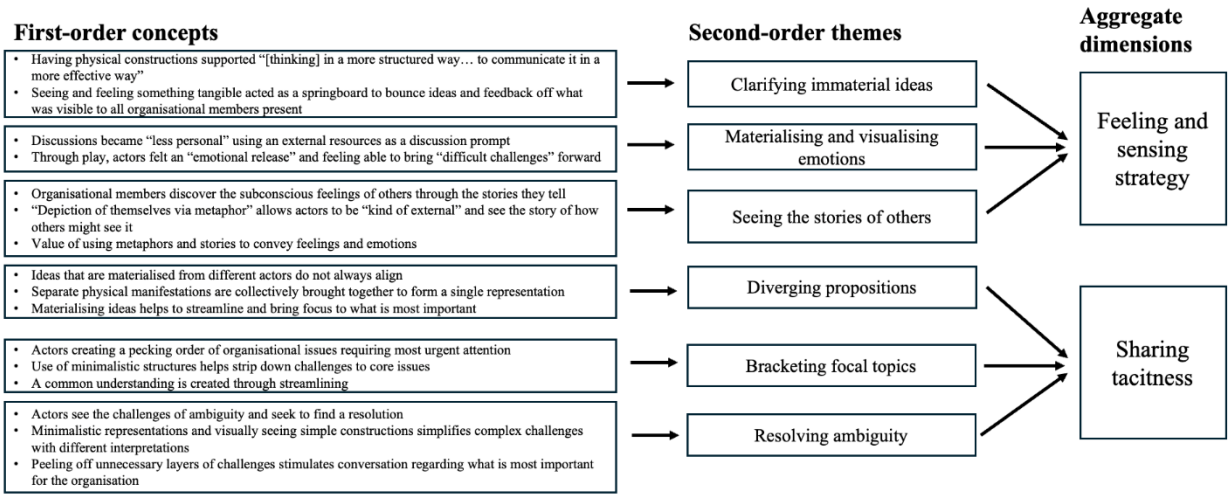
As part of the analysis process and identifying emerging patterns from the data, an unexpected theme surfaced that related to the power dynamics between managers and non-managers. From reviewing the data, it seemed the interplay between play and reason also gave way for existing power dynamics to be temporarily suspended. This coincides with March's (1971) articulation how sensible foolishness can enable actors to suspend rational imperatives for a transient time. Data structure B presented in figure 3.3 illustrates the themes that emerged, which centre on how hierarchies could be temporarily flattened during the interplay between play and reason. The themes related to how power dynamics changed, which occurred as a result of the interplay between play and reason. This emerging pattern did not speak directly to the intended research question but was nonetheless identified as a significant theme as part of the data analysis process. Thus, the coding structure in figure 3.3 leads to a supplementary and emergent research question, which asks: How can play in strategy temporarily suspend existing power dynamics? The central themes of reinforcing, flattening and considering feed into chapter 5, which illustrate how existing power dynamics can be temporarily suspended as a result of play.

Figure 3.3: Data structure B



A second emergent theme that arose during data analysis centred on how actors communicated with each other using non-verbal means and in particular, how they communicated tacitness. Building on the concept of tacit knowledge, I present tacitness as encapsulating any topic, feeling or idea that actors find difficulty in communicating with spoken words alone (Martin & Salomon, 2003). Similarly to the theme concentrating on power dynamics, the theme of sharing tacitness during strategy workshops was also identified as being of significance and worthy of discussion, though not directly related to the intended research question. Thus, this resulted in the second emergent research question, which asks: How can visualising strategy through play support the sharing of tacitness? The coding structure presented in figure 3.4 highlights the central constructs of diverging perspectives, bracketing focal topics and resolving ambiguity as core mechanics that contribute to the sharing of tacitness.

Figure 3.4: Data structure C



The coding structures presented in figure 3.3 and 3.4 showcase how data-analysis was a truly emergent process, where central patterns presented themselves at times unexpectedly. In particular, I found myself regularly referring back to existing theory and comparing the patterns I identified in the data with existing literature (Farny et al., 2018). The themes relating to power dynamics and sharing tacitness showed to be related to the interplay between play and reason, though not directly addressing the intended research question. Given their significance, it seemed appropriate to identify two supplementary research questions, that complement the first research question.

3.8 Establishing trustworthiness

Several steps were taken to help ensure trustworthiness of data. Researchers can achieve trustworthiness when they can demonstrate that their findings are credible, transferable, dependable and confirmable (Lincoln & Guba, 1985). Credibility was achieved through triangulation of different data types and maintaining a prolonged period in the research setting (Shah & Corley, 2006) to help build rapport with participants and gain an in-depth understanding of their business. I also verified findings with research participants (Seale, 1999) and submitted a report to participants to provide practical takeaways and this also enabled the participants to check through and correct any information. Creating thick descriptions of concepts, categories and processes revealed in the data helped achieve transferability. I also kept a detailed trail of events to produce a case story, which helped to

create a thick description. Dependability was achieved by keeping track of all interviews, recordings and observational notes. Participant anonymity and the security of collected data was guaranteed (Shah & Corley, 2006). Interview recordings and the video and audio-recorded strategic play episodes were immediately uploaded onto Aston University's BOX cloud drive, which is an encrypted platform that only I can access with a secure password. Finally, to ensure research confirmability, meticulous attention was paid to managing the collected data (Lincoln & Guba, 1985) and coding using Nvivo.

3.9 Ethical Considerations and Research Limitations

A core component of ethical research is informed consent, whereby it was essential for research participants to provide their voluntary consent that was free from coercion (Campbell, 2017). In line with ethical research, the PIS (appendix 7) and PCF (appendix 8) clearly detailed that participants have the authority to withdraw from the study at any time they wish and have full freedom to decline to answer particular questions during the interview. However, as put forward by Gioia et al. (2013), qualitative researchers should avoid promising confidentiality to participants as this would essentially prohibit reporting. Instead, it is more appropriate to ensure participant anonymity (Gioia et al., 2013) by using pseudonyms and excluding any participant identifying information. Pseudonyms have been used throughout this research study and no participant or business identifying information has or will be revealed as part of this research. To protect the participants of the study, I will also guarantee the security of collected data (Campbell, 2017). For data security, I stored the collected data in a secure Internet location, which was Aston University's Box platform, as this is an encrypted platform. Box is also a cloud platform, which is password protected and I as the researcher, am the only one with the password to access this Box account. Using Box also overcomes the risk of ever losing the data as the data is secured securely on a cloud platform.

This research has a focus on thorough immersion in the case but the risk with such an approach is that the findings may be distorted by the values of the researcher (Evered & Louis, 1981). Indeed, this is a major criticism of qualitative research due to what critics argue as a lack of objectivity (Walker, Holloway, & Wheeler, 2005). With regards to the data set, for the collected field notes to be useful, they do not need to deliver an accurate representation of events, but they must be able to deliver the experience of being in the scenario and capture the nuances of the event (Jarzabkowski et al., 2014). To achieve this, I translated my fieldnotes and personal reflections into vignettes for the findings chapters to create a sense of

déjà vu (Langley, 1999) and to help the reader feel as if they were in the room. The use of interviews also presented certain limitations, for example, participants may feel concerned with regards to the interview being recorded (Allmark et al., 2009). Inability to record the interviews could present issues with coding and data analysis. Out of all the conducted interviews, only two interviews were not recorded. For these interviews, I paid extra attention to what the participant was saying and repeated back my understanding to the participant so that I could confirm my notes.

3.10 Summary

To summarise, this chapter detailed the research methodology, which began with the constructivist paradigm, which underpinned this research project. In line with ethnographic approaches, the research methods followed participant observation techniques to collect data from multiple case studies to advance theory development (Eisenhardt, 1989). The full data set comprised observations, interviews and video-recordings, which allowed for triangulation to ensure more dependable (Denzin, 1978) research findings. By this point, coding and data analysis took place, where I applied grounded theory to circle between theory and data to inform theory production. The ethical and research limitations were also considered. No participant or organisation identifying information has or will be revealed as part of this research. The next chapter will detail the first set of research findings.

CHAPTER 4:

THE EVOLVING FLUIDITY BETWEEN PLAY AND REASON

4.1 Introduction

To reiterate the first research question: How does the interplay between play and reason unfold in strategy workshops and help actors navigate strategic challenges? Using a sociomaterial lens, this chapter zooms in on the micro-interactions of actors as they engaged in practices of play and reason during strategy workshops. The analysis of video recordings, supported by follow-up interviews and follow-up observations, revealed how organisational members demonstrated visible signs of increased comfort and relaxation as the workshop progressed. In line with increasing indicators of comfort, organisational actors underwent a process of evolving fluidity, that comprised three cycles of deliberate, dialectical and dwelling interplay. In each of these cycles, actors realised unintended process affordances (Burke & Wolf, 2021; Gibson, 1977) that surfaced through purposive (conscious but non-deliberate) action (Bouty et al., 2019). This purposiveness was also balanced with logical reasoning, where actors would intuitively ground fictional ideas back into reality. In addition, this chapter shows how value from strategy-making is not aways considered in terms of outcomes but also in terms of value of experience for example, that holds the potential to lead to greater commitment among organisational members to enact ideas back within their organisations.

This chapter is structured into four sections. The first section illustrates the challenges of organisational actors engaging in play and how actors demonstrated a visible resistance to abandon familiar practices, even if only temporarily. Table 4.1 provides a summary of these playful and familiar practices actors evidenced during the strategy workshop. Despite actors frequently regressing back towards familiar modes of interaction, even momentary instances of play proved to catalyse debate where participants revealed previously suppressed views. The second section delineates how organisational members gradually began to display signs of increasing comfort and relaxation. The practice of play became less forced, evidenced by reduced facilitator guidance. In line with increasing signs of comfort, actors animated themselves and displayed signs of liberation, being freed from the constraints of traditional work practices. The third section explains how organisational actors eventually reached a phase where they self-manage the oscillation between practices of play and reason. Here the two opposing forces of sensible foolishness and procedural rationality become mutually

constitutive where playful interactions became infused with logical justifications. This amalgamation produced a plethora of imaginative ideas and given the infusion between play and reason, these ideas were simultaneously grounded in reality. The fourth section considers the interplay between play and reason as an overall process, with particular attention being paid to the tensions and challenges within this process and how the evolving fluidity proved consequential for the participants' wider organisations. The chapter will conclude with a summary of the contributions from the findings of this chapter to the wider SAP research field and how this chapter begins to construct a novel theoretical bridge between SAP and March's (1971) sensible foolishness.

Table 4.1: Practices of play and reason

	Practices of sensible foolishness (playful practices)	Practices of sensible strategising (familiar practices)
Empirical gestures	• Ganging up on each other • Becoming protective of toys • Making sarcastic comments • Freely moving the body and toys • Searching for toys • Moulding Play Doh into shapes • Building a physical construction with toys • Creating metaphors	• Questioning the feasibility of ideas • Following facilitator guidance • Using objective language • Neutral facial expressions • Speaking with level tone of voice • Controlled body movements • Sitting upright in chairs
Field notes	• Participants displayed signs of play by using dynamic bodily gestures such as standing up from their seats and acting out scenarios, which resembles role play. Here, participants put on different voices to impersonate others they had come into contact with. • Participants appeared to be enjoying themselves as they were regularly seen laughing and smiling. • Participants looked surprised and even disappointed when the facilitator informed them that they had a few minutes left. The participants seemed to want to continue to continue to play with the toys. • When participants were physically interacting with materials (e.g. searching through boxes of toys, fiddling with a Lego car in their hands, or moulding Play Doh), this seemed to be an instance of play as participants did not immediately assign meaning to their materials.	• When participants were bringing their ideas to reality, they point to different materials in their construction to reinforce their argument. • Participants have a sterner facial expression as they bring their ideas to reality and recognise the seriousness of their position, particularly when they are discussing the future of their organisation. • When participants are discussing the feasibility of ideas, there is little material engagement. • Senior level organisational members were observed pointing to the constructions made by their team and reinforced the meaning of these constructions. This seemed to be a sign of acceptance of the views of wider employees. • Sometimes, an individual member will pull the rest of the team back to reality when the other members are seen to be having 'too much fun'.

4.2 Deliberate interplay

The cycle of deliberate interplay occurred at the start of the strategy workshops, where organisational actors engaged in play purposefully and deliberately. Here, play typically only occurred through facilitator encouragement and instances of play were short-lived, where actors engaged in minimal material interaction. Following this, participants swiftly reverted towards familiar practices, that did not involve any physical interaction with toys. These familiar practices were observed during the pre-observation phase, which actors were swift to resume during the cycle of deliberate interplay. Consider the vignette in Box 1.

BOX 1 – LOIS COMPLETING A TASK

The strategic episode with Capricorn began with the facilitator introducing that the workshop would involve the team navigating through their organisational challenges and that the participants should use the toys to guide the progression of the workshop. The facilitator asked the participants to begin by using the toys to physically represent what their challenge looked like. Their challenge related to the current working culture at Capricorn, where Zena hoped to transform the culture and for it to be "less relaxing" and closer towards "here's an expectation [that is required from the team]." Lois echoed this sentiment and wanted to create a culture that has "accountability without breathing down people's necks". Lois looked at Zena and asked, "what do we need?" and before waiting for Zena to respond, she started rummaging through one of the boxes and pulled out various animal figures: a fox, tapia and beaver. Lois placed these in the centre of the table and folded her arms. Claire followed Lois' initiative and searched for different animals to bring to the centre of the table. The team then sat upright in their chairs and began discussing the challenges associated with the current working culture at Capricorn. Zena said how there is a "lack of commitment" from the wider team who don't share their level of "investment" in the business. (Field diary)

The vignette in Box 1 describes how participants followed facilitator instruction and engaged in purposeful material interaction, where Lois grabbed a box of toys and decided to pull out some animal figures. Her initiative also prompted Claire to do the same, who followed Lois exactly and added different animal figures to bring to the table. This however, concluded the scene of play as actors sat back in their chairs and began to discuss their dissatisfaction over the wider Capricorn team, who Zena, Lois (and Claire) feel do not share their commitment to the business. The act of Lois grabbing a box of toys, looking inside the box and feeling around the box with her hand, deciding on an object (an animal figure) to take out of the box and place in the centre of the table, was in response to facilitator instruction. Here, Lois' facial expression

was neutral, and she displayed no physical or verbal indicators of enjoyment. This act was thus, not really considered play at all, as play is characterised by being freely undertaken to yield positive emotions (Eberle, 2014; Millar, 1968; Piaget, 1945), which was not evidenced within this scene during the workshop. The atmosphere of the room still felt as though the actors were engaging in a 'normal' meeting, as they had done so previously during the pre-phase of data collection. The mood of play was not yet evidenced among actors and the atmosphere of play, had also not yet been cultivated (Jørgensen & Beyes, 2023).

From field notes and immediate reflections, at this commencing stage of the workshop, Capricorn participants displayed no evident signs of positive emotions e.g. exaggerated body movements or comical facial expressions (Bjorklund & Gardiner, 2010; Gray, 2018). Instead, their physical and verbal interactions mirrored what was observed during the pre-phase of data collection where participants sat stationary in their seats and engaged in verbal discussion around the topic matter. At this point, participants only superficially engaged with the materials, for example, by choosing particular toys and placing these in the centre of the table. The participants looked uninterested in the materials and seemed to prefer avoiding interacting with them. Box 1 also shows how the participants treated play as a task to fulfil, where Lois took out the animal figures following facilitator instruction and then folded her arms, which appeared as though she had completed the task and began to engage in verbal discussion with Zena surrounding Capricorn's culture.

For the Rubix team, there was also evidence of a reluctance to continue to physically interact with materials as participants were swift to resume traditional practices of strategy that they were familiar with. Consider the vignette in Box 2. In this vignette, the facilitator tasked the team with creating a construction of what they think Rubix looks like as a business and what do they see as being the most important elements for the business. The team obediently follow the facilitator's instruction and begin working on their solo construction, searching for materials and piecing these together. Kylo shares his construction with the team and emphasises the importance of Rubix having foundational pillars to support the successful execution of their strategic vision.

BOX 2 – KYLO RETURNING TO FAMILIAR PRACTICES

Kylo had been working on a physical construction on what he feels represents Rubix as a business, which he and the rest of the Rubix team were tasked to do by the facilitator. Kylo produced a 'DNA construction' which he explains reflects the core values of Rubix and are essential pillars of the business. He goes onto explain how Rubix's DNA is directly connected with the strategic vision (represented by yellow and green connecting tubes), which need to be strong as these components form the foundational pillars of their business. Adam asks Kylo what the different colours represent and Kylo explains how they represent different elements and building blocks of the company. Building on Kylo's construction, the team then engage in discussion surrounding the roles of different team members in achieving their organisational strategy. Kylo then asks: "what is everybody doing?" and then proceeds to take out a piece of paper and a pen and writes down the tasks each team member is responsible for. (Field diary).

In the vignette depicted in Box 2, after Kylo explained the meaning of his construction, the team then engage in verbal conversation about how the work of each team member is contributing to achieving the strategic vision, which Kylo represented using interconnected yellow and green tubes. At this point, Kylo brings out a piece of paper and a pen to write down the tasks each team member is currently undertaking. This deliberate action signalled Kylo's desire to finish engaging with the toys and to clearly define the tasks being undertaken by each team member using written words. The shift back towards familiar materials and practices is another indication of organisational participants showing their resistance to physically interact with the toys and only did so because the facilitator instructed them to. Regressing back to these familiar practices (e.g. writing on paper) is an example of actors seeking to resume documentation of their task allocation, a typically rational process. During the pre-phase of data collection, the Rubix team came to meetings with their laptops and various documents including teaching notes for example. Seeing written words on paper or on a laptop that documented the responsibility of tasks proved to be a practice that the Rubix team (especially Kylo) were keen to resume.

Later, Kylo goes onto say how "feedback is important" and Tam responds by saying "how do we represent that [with the toys]". Kylo says he will start "with this thing [Lego vehicle]. I think there needs to be some kind of moving channel." The exchange between Tam and Kylo indicates that despite a visible reluctance to interact with the toys, participants can prompt

each other to do so. Following the actions of others shows how participants can unintentionally fall into play where even small physical interactions with materials can serve as powerful prompts that cause actors to fall into play. For instance, in Box 1, Claire was seen following Lois' initiative to search for animals and during the Rubix workshop, Tam encouraged his managing director to physically represent his ideas using the toys. Ultimately, both these examples show that instances of play were short lived and that actors were keen to revert back to familiar working practices that did not involve physical interaction with the toys.

The examples illustrated above show how Claire and Kylo were influenced by their colleagues to engage with the materials. This did not appear to be the case for the Blueberry team where Mila's interaction with the toys was not enough to prompt Daemon to do the same. Consider the vignette in Box 3. Daemon deciding not to interact or even look at the boxes of toys indicated his resistance to play. However, he did eventually engage with the toys following further facilitator encouragement, which reinforces the view that strategy workshops and serious play workshops would benefit from a skilled facilitator to help guide participants (Heracleous & Jacobs, 2008).

BOX 3 – DAEMON FOLLOWING FACILITATOR INSTRUCTION

Mila promptly pulled one of the boxes towards her and looked inside the box. She appeared to take her time and spent a few moments deciding which materials to bring out of the box. Daemon on the other hand was sat upright in his chair with his arms folded, looking aimlessly at the desk in front of him. He had blank facial expression and sat motionless with little indication of any intention to play. Noticing this, the facilitator prompts Daemon to have a look at the materials. At this point, Daemon then pulls one of the boxes of toys towards him and looks inside. He takes time to look at the materials and familiarise himself with the toys that are available. Daemon then picks out different coloured Lego bricks and slowly begins piecing them together. (Field diary)

In the vignette in Box 3, Mila appeared more open to the idea of play and seemed keen to explore the materials that were at her disposal. By contrast, Daemon's bodily gestures (e.g. arms folded and sitting back in his chair) indicated that he was reluctant to interact with the toys. Ultimately, both Mila and Daemon began to build physical constructions with the toys following facilitator encouragement (and further encouragement for Daemon). For all the participants across the workshops, the stage of deliberate interplay was characterised by neutral facial expressions with no visible signs of joy, interaction with materials occurred as a

result of facilitator encouragement and participants were swift to resume traditional practices that did not involve the use of toys.

The first phase during the interplay between play and reason evidenced actors engaging only in minimal material interaction (e.g. placing an animal figure in the centre of the table). This material interaction occurred as a result of facilitator encouragement but also sometimes due to prompts from colleagues during the workshop (e.g. Tam asking Kylo to physically represent his ideas), where actors at times fell into play. The unwillingness of participants to engage in play was observed through their regression back towards familiar practices (e.g. verbal discussion and using pen and paper to write down ideas). Actors also displayed signs of uncertainty as they spent time simply looking at materials before physically toughing them, bringing them out of the box and moving them across the table. Part of the reason for this can be attributed to fear of judgement from others and actors feeling anxious about presenting a different (or more playful) version of themselves (Goffman, 1956). Hence, they find themselves automatically reverting to familiar norms and behaviours due to their rigid exterior shell (Montagu, 1988), which play had not yet broken down.

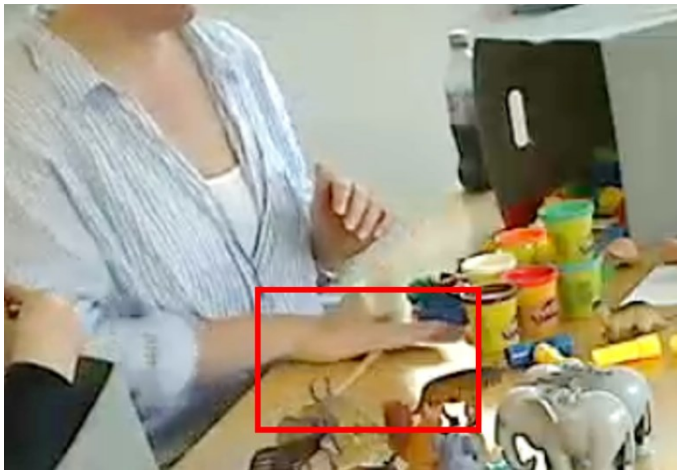
Importantly, at this phase of the workshop, the atmosphere of play was evidently missing. Atmosphere relates to the mood and feel of the room (Jørgensen & Beyes, 2023) and actors having a not at work mindset. Yet, as evidenced in the vignettes, the atmosphere seemed to mirror what was observed during the pre-phase and the vignettes also illuminate the desire for actors to resume familiar working practices like documenting task allocation. Despite the limited interaction with the toys at this stage in the workshop, even the minimal engagement with toys presented itself as a springboard for two unintended process affordances to arise: uncovering suppressed points of view and reconciling divergent perspectives, both of which will be unpacked in the following sub-sections.

4.2.1 Uncovering suppressed points of view

Uncovering suppressed points of view occurred as organisational members used the materials and the practice of play as a means to convey hidden feelings that they had previously not felt comfortable to raise within workplace settings. For the Capricorn team, as the workshop progressed, there seemed to be some more physical interaction with the materials where Claire was seen reaching over to a box of toys and picked out different coloured connected tubes. She seemed focused on piecing the different coloured tubes together. At the same time,

Lois appeared to be 'in her own world' as her gaze remained fixated on the cluster of animals she and Claire had earlier placed in the centre of the table. After a while, Lois comments about her aspiration to reach a "flat culture." Claire, who had shifted her attention away from the connecting tubes and towards orange Play Doh, quietly responds by saying "we're relatively boundary-less" while she roles out the piece of Play Doh into a long string (Figure 4.1) then places this to one side.

Figure 4.1: Claire rolling out a piece of Play Doh



The act of rolling the Play Doh prompted Claire to uncover her suppressed point of view that Capricorn lacked working boundaries, which she feels results in greater work for her due to a lack of commitment from other team members. Later on, Claire connects the ends of Play Doh string to create a circle and places an aardvark inside of this circle, whose tail extends beyond the circumference of the Play Doh This act of first doing (rolling the Play Doh into a string) and then later assigning meaning (the Play Doh string signifying missing boundaries) showed how the materials offered a means for actors to reveal their feelings and to bring sensitive topics to surface, as evidenced in the quote below.

> "I definitely felt more able to be like, honest and also a bit challenging of them [co-founders]… when we were talking about it with the play involved, they [co-founders] heard it a bit better and it kind of landed a bit better and maybe they agreed with me." [Claire]

Claire's reflective quote from her post-workshop interview draws attention to how she felt more able to be honest of her feelings and how she felt in a position to be more challenging of her co-founders. Specifically, Claire goes onto say how given she felt that she is undertaking comparatively more work compared to other team members, which she attributes to her

commitment and personal dedication to Capricorn. Claire also explained how raising her view of a lack of working boundaries at Capricorn "landed a bit better" and was better received by the co-founders because she raised this during the workshop where play was involved. Uncovering suppressed points of view thus occurred as organisational actors interact purposively with materials during play (e.g. Claire rolling the Play Doh). This purposive act prompts them to share their personal sentiments as participants feel "more able" to be "honest" in the presence of managers. This also begins to point towards the capacity of play in suspending power dynamics (Bakhtin, 1981) and rules (March, 1971) for a momentary period of time.

4.2.2 Reconciling divergent perspectives

Reconciling divergent perspectives occurred when play prompts actors to bring forward their individual ideas, leading to different perspectives being presented, which results in a process of practical thinking to coordinate and manage differing views. For example, during his pre-workshop interview, Kylo expressed his frustration that the Rubix team were not wearing their uniform when interacting with customers. Despite Kylo informing the team to wear the company uniform, the team failed to do so and the issue continued to persist. During the Rubix workshop, the Rubix team had moved onto discussing customer acquisition and how to retain customers in the long run. Kylo raised the topic of representation and how the team present themselves to customers. "For me… this first impression is really important and I must mention how we dress and… how we dress and this is important." He then proceeded to search through the toys and he takes a tiger and an antelope and creates a physical construction (Figure 4.2) on the table in front of him. Kylo goes onto explain his construction and how he is a tiger that is trapped and unable to do anything as he watches the antelope walk away without carrying its responsibility of the bridge, that it left behind.

Figure 4.2: Kylo's trapped lion

While this issue of uniform is not a strategic issue, it is a topic of serious concern for Kylo and reflects the internal tensions at Rubix that digress focus away from the more serious strategic challenges. In raising this issue, Adam was visibly displeased and when Kylo bought up the topic of uniform, this caused strategic discussion to spin-off (Burke & Wolf, 2021) into seemingly unsignificant topics, which in fact presented themselves as unaddressed and deep-rooted issues that affected team dynamics. Adam did not share Kylo's sentiment that wearing the uniform is significant and said that by being forced to wear the uniform "you're no longer yourself." However, Adam eventually revealed that he doesn't find the uniform "very comfortable" to which Kylo responds immediately and without hesitation by saying the uniform can be changed. For the Rubix team (and Kylo in particular), their interaction with the materials enabled certain topics to be addressed that had previously been looked over. For the rest of the team, wearing the Rubix uniform was not seen as a significant issue and not an area of concern. For Kylo, this issue had been bubbling beneath the surface and so Kylo re-raised the matter again but this time, the issue was reinforced through metaphorical and physical representation. The interaction also prompted Adam to reveal that the reason why he chooses not to wear the uniform is because he finds it uncomfortable, to which Kylo responds that the uniform can be changed and that a more comfortable uniform collectively agreed upon by the Rubix team. Given this decision was made collectively and not an instruction made by Kylo, this helped foster commitment among the Rubix team to wear the uniform when interacting with customers. As Kylo reflected on his experiences during the workshop in his post-

workshop interview, he revealed how play and the toys allowed him to raise topics in different ways.

> "I think it [play] helps communicate things in a different way… it was good for in terms of getting the message across." [Kylo]

Later during his post-workshop interview, Kylo explains how after the workshop, the Rubix team went to try on and pick out their own uniform, so that they could wear something they chose collectively and found comfortable, as reflected in Kylo's quote below.

> "There were some issues revolving around uniform, which was an issue at the time. But then it wasn't until many meetings later, where the issue of uniform came up again [during the workshop] and then the solution [came]… They [the Rubix team] went and chose their own style of jumper that they were comfortable with then we put the logo on and that solved the jumper issue." [Kylo]

Kylo's reflections reveal how the use of toys afforded him the opportunity to raise topics that were of importance to him (i.e. the uniform issue) through play and raise his concerns to the wider team through different channels. This also coincides with Claire's reflections and how raising topics in the context of play permits organisational members to raise different perspectives where the toys help participants better understand the views of others through a different manner of communication. The multimodal nature of the workshop that expanded beyond verbal and visual means thus helped supported participants in creating a deeper understanding (Bürgi & Roos, 2003) of the perspectives of others and supported organisational members in reconciling these perspectives.

4.2.3 Summary

The first cycle of deliberate interplay revealed how participants were (unsurprisingly) hesitant and visibly reluctant to engage in play and physically interact with the toys. As a result, there was more regular facilitator encouragement, where the facilitator was observed prompting participants to interact with the toys. There seemed to be a dominance of actors regressing towards their familiar practices, like documenting tasks. Unexpectedly, another prompt for material interaction came in the form of participants encouraging each other, where participants would follow the material interactions of their colleagues and probe their colleagues to show their ideas with the toys rather than simply share their ideas verbally. Overall, this first cycle showed the dominance of traditional practices and different hurdles (i.e.

resistance to play) that needed to be overcome. However, despite the reluctance to play, the affordances that emerged during the (minimal) playful interaction helped to encourage the shift into more authentic play, that was more relaxed and less probed by the facilitator. Thus, the affordances depicted above in section 4.2.1 and 4.2.2 are not necessarily conceptualised as outcomes from play, but rather, entangled with the move into more moments of authentic play, which is less forced and more relaxed. For instance, actors use the materials to share divergent perspectives view, which leads to reconciled positions among the team members. These positive emotions arising from material interaction pave the way for more authentic play, which I will now unpack in the second phase of dialectical interplay.

4.3 Dialectical interplay

In line with Marxist thought, dialectics relates to the principle of the struggle of opposites, where all phenomena contain internal opposites or contradictory aspects and it is this struggle between opposing components that can drive change and development in society (Gottlieb, 1972). While the roots of dialects are associated with bringing about societal change, the principles of the struggle of opposites were also evidenced during the strategy workshops, where participants faced tensions between play, fun and laughter, and opposing forces of logical thinking and composed behaviour. Dialectics recognises how change and development can arise from internal contradictions within systems (Gottlieb, 1972). Hence, building on the historic understanding of dialectics, this section will unpack how contradicting forces of play and reason, and fun and seriousness, can impact the development of organisational strategy.

Dialectical interplay occurred as actors gradually began to show physical signs of relaxation and displayed visible indicators of enjoyment and pleasure from play (e.g. laughing and smiling), while also evidencing indicators of composure and logical reasoning. Here, organisational members began to self-manage the opposing forces of play and reason and were less reliant on facilitator guidance. Given that the facilitator was less involved in terms of encouraging participants to play, this signals that participants had gained the confidence to play and were comfortable to do so. The significance of this cycle during the interplay between play and reason rests upon the displayed signs of comfort, relaxation and joy from participants as they appeared more eager to interact with materials. However, participants also continued to show signs of reverting towards familiar practices. Consider the vignette in Box 4.

BOX 4 – LOIS AND CLAIRE GANGING UP ON ZENA

The facilitator guided the participants to move onto their second challenge, which centred on Capricorn's current reliance on public sector funding, which Lois and Zena were keen to branch away from. Lois added elephants, a cow, tapia and with some yellow Play Doh that she had rolled into little balls to the centre of the table. She sat back momentarily, looking at the toys in front of them and then added a net to cover the yellow Play Doh balls, which were placed next to the tapia. As they were bringing different toys to the table, the participants remained relatively silent as they appeared to be selecting and moving toys freely and openly. Later, Zena mentions a particular funder for Capricorn, to which Lois responds by saying that funder should be "over here" and points to the tapia "guarding" the yellow Play Doh balls. Lois comments that they are the "bad people" and Zena echoes this by saying they're the "baddies." Zena sighs and sits back in her chair as she explains how Capricorn are in "almost an abusive relationship" with their funders who "have the power to cut off funding" whenever they like. After a period of verbal conversation with little material interaction, the facilitator repeated himself and asked the participants to show their thoughts. Zena then picked up a Lego builder and positioned the builder in the centre of their material construction. Zena turned to the facilitator and said, "do you know you haven't got any female people?" to which Lois responded "you can't just assume what gender they are." Claire and Zena start laughing before Claire echoes Lois' statement and says "we can't decide what gender someone is based on how they look" to which Lois smirks and gives Zena the 'I told you so' look and says "yeah [Zena]", which Claire repeats even more sarcastically. This humorous exchange soon ends as Zena, who seems keen to change the topic, diverts attention back to the construction and the issue regarding their funders. (Field diary)

The vignette in Box 4 captures how over time, the participants still seemed to demonstrate a preference towards familiar modes of strategising, that was free from toys, metaphors and banter. For example, when the topic of Capricorn's funders is raised, Zena sits back down in her chair and comments on the power of the funders to cut off Capricorn's funding. Her choice of words is direct and logical and as she explains the challenges of public sector funding. Zena avoids any interaction with the materials, which she is explaining the difficulties of Capricorn's funding source. Yet, when prompted by the facilitator, Zena does engage with the toys and upon closer interaction with the toys, her curiosity is sparked about the material properties of the toys (e.g. the figures appearing to be male). Box 4 also shows how Zena swiftly concludes the humorous encounter by reverting towards familiar modes of strategising, where she

evidenced a neutral facial expression and avoided interaction with the toys. This encounter thus captures the tensions between the opposing forces of play and reason and how actors can be encouraged to play by the facilitator and from each other (e.g. Lois and Claire 'ganging up on' Zena). Yet, the video-recorded episodes showed a desire for familiar modes of strategising and a reluctance to change (Montagu, 1988) despite the dialectics.

Box 4 further highlights the role of the facilitator and how through gentle facilitator encouragement, the participants once again engage in play and the scene illustrated in Box 4 shows how Zena's casual question towards the facilitator catalysed a humorous exchange where participants displayed signs of comfort, relaxation and joy. Claire, Lois and Zena were observed laughing and smiling as Claire and Lois made a point that Zena shouldn't have assumed the gender identity of the Lego people. The unfolding of this humorous interaction indicated that participants felt relaxed enough to engage in playful banter with each other. Given that Claire was also involved in 'telling-off Zena' in a light-hearted and playful way, this continued to enforce the capacity of how hierarchies can be overturned alongside shifts in power dynamics (Bakhtin, 1981). For example, during the pre-observation phase, Claire was not observed engaging in humorous banter with either of the co-founders. Play thus serves as a mechanism to overturn norms and temporarily suspend rational imperatives (Bakhtin, 1981; March, 1971). Immediate reflections of the workshop showed that had the nature of the playful banter not been directed towards Zena, this could have continued longer but instead, Zena seemed keen to move the attention away from her and so she resumed conversation regarding their funders. This pulled actors away from play and fun and back towards sensible strategising (see Table 4.1).

In contrast, the Rubix participants rarely showed signs of laughter during their strategic episode. The participants were observed smiling less so, compared to the participants from Capricorn and Blueberry. The visible signs of enjoyment and pleasure were less apparent from the Rubix team. Despite this, post-workshop reflections with Rubix revealed how participants found the activity of play to "be a good bonding exercise" and how play was "good in terms of inspiring creativity." The dynamics revealed in the workshop for Rubix showed that while obvious signs of enjoyment were slim, the participants did evidence indicators of greater immersion and engagement with materials as the workshop progressed. Consider the vignette in Box 5. Here, participants are seen engaging more in the activity of play as they lean in towards the centre of the table, explore the available materials with their hands and selected pieces to bring to the centre of the table.

BOX 5 – ADAM'S PLANK OF PUNISHMENT

As the Rubix team are discussing the allocation of tasks among the team, they are all seen physically interacting with the toys and collectively creating a physical representation of their allocation of tasks. While Adam and Tam are seen adding different toys to the construction (e.g. a Lego builder and shaped pieces of Play Doh), Kylo is seen taking the lead and explaining the meaning of their construction. He points to a Lego builder and explains that Adam (symbolised by the Lego builder) will carry the tasks into week two and Kylo rolls the Lego vehicle across the construction. Adam pauses and says they need "enforcement" and something to ensure tasks are completed. Kylo does not respond to Adam's comment and continues to modify the construction. Later, the facilitator notices Adam has created his own model with Lego bricks and asks Adam what it means. Adam responds by saying "This is my punishment… You start here, then start climbing this ladder, and then you walk the plank". Following on Adam's punishment metaphor, Kylo says he's missing his "whip" and passes Adam a piece of Lego, that appears to symbolise the whip. Adam smiles and gently nods as he takes the Lego piece from Kylo. This then results in a frank conversation about consequences (or a lack of consequences) that are in place at Rubix and the difficulties this is causing (for Kylo especially). (Field diary)

The above vignette in Box 4 presents different unfolding team dynamics between the Rubix team. Participants are first seen physically engaging with the materials and playing with various toys, freely moving them across the table and selecting toys that hook their interest. As participants continue to engage in play, this prompts new thoughts to emerge, which they share with the team (e.g. Adam raising that they need enforcement to ensure tasks are completed). However, Kylo appears to not take notice of Adam's comment and continues working the collective construction. This instance is contrary to what occurred in the other two workshops for Capricorn and Blueberry, where the comments of organisational actors were often treated with attention and focus when they were raised. It is only when the facilitator asks Adam to explain the physical construction (see figure 4.3) he had been working on, are his views on introducing a form of punishment taken into consideration and focused on by the team. What follows is a period of verbal debate, with the team discussing the importance of having punishment and the ability to fire people, which Kylo fears he doesn't have, given that Rubix is comprised of three family members and other employees who are very close to the family. The vignette in Box 5 shows organisational actors actively engaging in play with less facilitator encouragement, which indicates the increasing comfort and confidence to engage in play. While the Rubix team did not evidence obvious signs of joy (e.g. laughter and playful

banter), this scene during the workshop showcased their active physical engagement with the materials, that shaped the direction of strategic discussion and brought important topics to surface.

Figure 4.3: Adam's material representation of punishment

For Mila and Daemon, instances of laughter and banter were also less regular. However, the video recordings showed Blueberry participants smiling and engaging in dynamic bodily movements (e.g. waving their arms in the air), which indicated signs of relaxation and comfort as they practiced play during the workshop. Consider the vignette in Box 6.

BOX 6 – (LITERALLY) KNOCKING DOWN BLUEBERRY'S BARRIERS

One scene during the workshop for Blueberry showed how Mila seemed quickly drawn to the animal figures and placed a lizard and an aardvark in the centre of the table. Mila later explained how these animals represented her and Daemon and that she chose those two animals specifically because they were the "less ugly ones", prompting Daemon (and the facilitator) to chuckle. Daemon was also seen interacting with the toys as he brought connecting pipes and Lego bridge to the centre of the table. He moved them around the table, as if he was trying to find the optimal place to position the objects. During this scene, the participants engage in only minimal verbal interaction, with only a few words (e.g. "this can go here") being quietly uttered. Mila and Daemon appear concentrated on the toys in front of them and they soon piece together various toys and create a visual landscape of what Blueberry looks like. Daemon takes the initiative and begins pointing to different parts of the construction and explaining the challenges facing Blueberry. While he is talking, Mila is seen fiddling with a connecting tube in her hand. He points to the start of the construction and says, "we get to here, then we turn back to the start." Daemon goes onto say "rather than spending more time here, we need to try and work out how… [accidently knocks bridge down] how we do that!" Mila laughs in response Daemon's clumsiness and nods eagerly. Daemon continues to verbally annotate his and Mila's landscape and the subsequent debate between Mila and Daemon centres on breaking down bridges and entering into the long-term operations for Blueberry, rather than being trapped in the short term. (Field diary)

As with the case of Rubix, Daemon and Mila were seen quietly working on their physical constructions. The lack of verbal dialogue between them at this point indicated their immersion in play as participants appeared focused on the toys and concentrated on which toys to bring to the centre of the table and how they would position the toys. The use of toys also helped to strip-down organisational challenges and simplify them, as reflected in Mila's follow-up interview below.

> "I think it [play] just simplified it because I think for a lot of businesses, you can over complicate things when they're actually really simple issues. So that was really nice." [Mila]

While Mila's facial expressions and physical movements were not always dynamic or exaggerated, her reflections after the workshop revealed the value of play in helping her (and Daemon) simplify Blueberry's challenges. The scene depicted in Box 6 showcases how participants seem to demonstrate a greater willingness to engage in play. Mila and Daemon

were observed working on their physical construction without further facilitator prompts. As they were doing so, neither Mila nor Daemon exhibited visible indicators of happiness or enjoyment from the activity as their facial expressions remained neutral. Yet, what seemed apparent was the increased willingness to engage in play, as participants seemed to gain confidence and familiarity to interact with the materials freely and openly. The practice of play concluded when both Mila and Daemon paused from interacting with materials and took a moment to look at their construction. They seemed satisfied and then Daemon began to verbally annotate their construction. By decoding the meaning of different parts of their construction (e.g. the building blocks and the Lego bridge), Daemon reverted back towards familiar strategising practices and began discussing his concerns related to being in the short term. The act of self-driving the direction of the workshop showed the increased confidence participants had gained in managing a dedicated period of play before then engaging in a period of assigning meaning to the objects of play. In Box 6, while Daemon is explaining his interpretation of their physical construction and pointing to different parts, he accidently knocks down a Lego bridge and explains how he and Mila need to be able to do the same, which is reference to Blueberry knocking down barriers, which prevent the business from growing. Mila responds with a wide smile and nods eagerly, understanding Daemon's literal reference of knocking down the bridge.

From the vignettes illustrated in this section alongside collected fieldnotes and immediate reflections from the workshop, it appeared that participants gained an increased level of comfort and confidence to physically interact with the toys and engage in play. This was evidenced through reduced facilitator involvement as well as participants picking up different materials and fiddling with them in their hands. There were also clear indicators of joy and pleasure, where actors purposefully made jokes and engaged in humorous banter. However, other physical indicators of joy and relaxation appeared to be more subtle, such as smiling and free-flowing and continuous physical interaction with materials, also surfaced. Yet, despite these indicators, participants still self-directed the progression of the workshop towards familiar practices that involved filtering through ideas that arose from animating and liberating themselves during play. These two processes will now be considered in turn.

4.3.1 Animating and liberating

Animating and liberating occurred as organisational members freed themselves for a transient time from the confines of rational behaviour. Liberation has been referred to as the temporary

release from psychological restrictions (Oh & Pham, 2022) where actors can act and behave without fear of judgement from others. Here, actors feel free and able to present a different (and more playful) version of themselves (Goffman, 1956). In liberating themselves, actors animate their bodies (and the materials) as they engage in dynamic and at times exaggerated physical movements that also sometimes involve the toys. As described in Box 6, when Daemon accidently knocks down the Lego bridge, this sparks a discussion between him and Mila regarding how they can break into the long-term goals for Blueberry. As the discussion continues, Daemon is seen reaching his arms into the air (Figure 4.4) and pointing in different directions, as he apparently uses his arms to express his desire to break down the boundaries, currently entrapping Blueberry. Daemon's animation of self was a new practice of play, which hadn't been observed during the pre-phase of data collection and Mila, who seemed to look a little surprised, smiled as she saw the CEO of Blueberry display signs of enthusiasm.

Figure 4.4: Daemon waving his arms in the air and Mila smiling in response

Displays of animation and liberation thus indicated signs of being freed from expected work practices and norms, which play enabled participants to achieve (March, 1971). This freedom from embedded organisational norms manifested itself where participants showed more expressive and non-verbal cues (e.g. dramatic movement of arms and toys). The interaction with toys thus offered participants the means to "act foolishly without justification" (Beckman, 2021, p. 8) and to freely move the toys and piece them together without the need to justify immediate meaning. Animating, liberating and acting foolishly however were not always correlated to the direct tackling of organisational challenges and did not always enable actors to discover new and better goals, as put forward by March (1971). At times, these interactions

brought about feelings of connectedness, commitment and generated modes of affirmative thinking, which provided motivation during strategy making. This was reflected in Mila's follow-up interview, as seen below.

> "You could actually be quite honest about how you felt... it was good and I think it's helped me in the work that I do to be able to see what to prioritise and what not to prioritise" [Mila]

Animating and liberating therefore enabled actors to realise other forms of value, e.g. being able to be honest about how they were feeling, which actors felt they couldn't share without engaging in play. In her interview, Mila also shared the retrospective value she held from looking back on the workshop. As Blueberry's Sustainability Lead, Mila explained how she was not involved in the strategic direction of the business but after the workshop, she recognised the value this had on her own role in the business in terms of prioritisation of tasks.

4.3.2 Filtering through ideas

Filtering through ideas occurred as organisational actors went through ideas generated from play and pinpointed hidden gems that sparked resonance. Practicing play stimulated the creation of different ideas and the discovery of new goals (March, 1971), which formed a physical landscape of ideals (represented by the toys), many of which would remain ideals and not extend beyond the strategic episode. For example, during their strategic episode, Mila and Daemon had created a landscape of possible avenues for future funding that would ideally result in Blueberry being less reliant on incoming projects, which proved to be an unsteady and unreliable income stream. Figure 4.4 shows the five different funding streams that were created. First, the monkey (cut out of shot in figure 4.5) represents Blueberry evolving over time to reach a wider range of clients and serving entrepreneurs outside Blueberry's local region. Second, the group of Lego people represent a network of advisers to help expand the business and to also bring in industry experts. Third, the ladders represent private funding for business support and the elephants symbolise past community members (Blueberry alumni) who are valuable in terms of building Blueberry's reputation and the value of Blueberry's service offerings. Fourth, the treasure chest sitting on top of the bridge represents a venture fund and finally, the house made of building blocks represents the opportunity to generate funds through an "entrepreneurial housing" scheme and to rent out workspaces to entrepreneurs. This landscape of ideas emphasises the creative potential of play, which previous studies have also found (Bateson & Martin, 2013; Sicart, 2014). However, some of

these ideas generated from play are redundant and do not get enacted in practice, thus prompting actors to unearth hidden gems amongst the rubble of ideas.

Figure 4.5: Blueberry's visual and physical landscape of ideas

As Mila and Daemon were sharing their reflections regarding these diversification options, it became apparent that certain options, like the venture fund, were unlikely achievable in the foreseeable future. When the participants directed their attention towards evolving Blueberry as a business, Mila asked "who are we evolving for?" As Mila asked this question, she picked up the monkey (that symbolised Blueberry's evolution) and fiddled around with the monkey in her hand. Before waiting for Daemon to respond, Mila explains the reason she joined Blueberry was due to the focus on supporting entrepreneurs and providing services for entrepreneurs to enable them to grow and make a difference to their own clients. Currently, Blueberry are not operating to fulfil the organisational mission, that is to support their community of entrepreneurs. After sharing her thoughts, Daemon is in agreement and the participants recognise that through the process of filtering possible options presented in their landscape, evolving the business proved to be most significant and that Blueberry should either evolve to re-align with its existing mission or a new mission should be created. In her post-workshop interview, Mila commented how the practice of play enabled her to raise concerns about Blueberry's operations.

> "I've been feeling like… Upset and angry with the way the business is going and mainly towards [Daemon]. So I think it was quite nice to deal with that in a very like,

> non-hostile environment, where you could actually be quite honest about how you felt and in a polite way and that didn't get sort of argumentative." [Mila]

Mila's reflections emphasise how the value arising from the interplay between play and strategy work manifested in terms of feeling confident and comfortable to discuss potentially sensitive matters that may be a cause of argument between organisational members. Filtering through ideas thus enabled Daemon and Mila to pinpoint evolution as the most important option for Blueberry to pursue, given their current operations do not align with their mission. Doing so, created avenues to raise concerns that had previously been concealed, allowing assumptions to be challenged. Other options such as the venture fund, which were indeed creative ideas stemming from play, proved to be redundant. This underlines that while play holds potential for more creativity, not all ideas hold promise and value to be enacted in practice.

4.3.3 Summary

In summary, there were two central observations that characterised this second cycle. First, there were increased signs of participants organically engaging in play. These indicators of play did not always manifest in obvious forms (e.g. laughter and banter) but sometimes actors would freely pick up an object and fiddle with the toy in their hand. Collectively, these physical displays showed signs of greater relaxation from actors and reduced resistance to engage with the materials. However, facilitator guidance was still necessary, as actors continued to resume familiar practices as they physically closed themselves off from play (e.g. by sitting back in their chairs and folding their arms) and regressed towards sensible strategising. This leads to the second observation, where actors appeared to face a struggle between the opposing forces (Gottlieb, 1972) of sensible foolishness and familiar strategising. At times, actors were observed joking with each other but then, they were pulled back to familiar practices, upon unearthing a hidden gem. Equally, actors seemed keen to continue sensible strategising but prompts from the facilitator pushed them to interact with the toys. Taken together, this tension between play and reason supported organisational actors in crafting out changes to their strategy that stemmed from the tension between playful and familiar practices.

4.4 Dwelling interplay

Up until this point, actors had largely been conscious and aware of their playful interactions, for instance, actors would purposefully search and bring materials out of boxes because the facilitator encouraged them to do so. Practices of play were deliberate as organisational members were conscious and even cautious of their actions as they interacted with the toys. Over time, there was a gradual shift in these interactions, which became more instinctive rather than forced and the atmosphere of the room also became more light-hearted. For instance, actors became more expressive with their bodies (Knight, Lok, Jarzabkowski, & Wenzel, 2024) and these signs of relaxation and comfort helped foster a positive and more lively atmosphere. This change in dynamic also influenced team interactions (Jørgensen & Beyes, 2023) and helped promote greater collaboration between organisational actors. This gradual shift away from awkwardness and towards a more holistic and relational atmosphere, underpins the final cycle of the interplay between play and reason: dwelling interplay.

Here, I draw on Chia and Holt's (2006) and Heidegger's (1962) concept of dwelling, which conveys a particular mode of being in the word. In the dwelling mode, actors are immersed in their environment and respond fluidly to situations and cues, in other words, actors are in an almost absorbed state (Chia & Holt, 2006) of being-in-the-world (Dreyfus, 1991). Like a pianist playing piano in concert, they are fully immersed in their practice and absorb themselves with the music and the piano keys. The pianist does not think about each individual note before playing it, rather, they are relaxed and 'at-one' with the piano. Hence, dwelling interplay occurred where actors displayed signs of being fully immersed in the practice of play and self-managed the oscillating dynamic between play and reason. During this cycle, actors had transitioned from a purposeful, deliberate and conscious practice of play, towards a more absorbed state of being immersed in play.

Consider the vignette in Box 7. Here, the Capricorn team were observed engaging in humorous banter with each other and Zena took the initiative to bring the discussion back to reality, rather than continuing the playful exchange.

BOX 7 – CAPRICORN'S BOAT TO SAFETY

The workshop for Capricorn was drawing to a close and in the essence of time and to reach a conclusion, the facilitator guided participants to reflect on what they had considered during the workshop and to look towards the future and where they see Capricorn progressing towards. The participants engage in some small talk while searching for toys and the conversation between Lois and Claire shifts towards their influence in schools and how they would like to have topics of "preventing extremism and hate crime" being prioritised in schools. While they are talking, Zena is seen standing up from her chair and orchestrating a visual landscape, shifting and moving toys across the table. Following Zena's initiative, Lois joins and brings the three elephants to the centre of the table (who had represented her, Zena and Claire throughout the workshop). Lois finds a boat and adds this to the material landscape. Zena nods, points to the boat and explains how Capricorn exist to help save young people from spiralling into extremist behaviour. Lois responds saying that Capricorn do not save young people the young people save themselves, but Capricorn provide the boat to safety. Zena nods eagerly and then places some different Lego people inside the boat. She then takes one of the elephants and positions it away from the centre of the landscape. Claire sarcastically says, "[Zena's] running away from us" which Zena responds by saying "yeah, see ya, guys!" as she waves goodbye to Lois and Claire, and then walks off briefly. Claire laughs loudly and a little sarcastically. Zena quickly comes back to the table and says "but seriously, we want this [Capricorn] to last when we're not here." (Field diary)

The vignette in Box 7 showcases Zena 'in-the-zone' as she creates a material landscape using the toys. By standing up from her chair, Zena was able to gain a birds-eye view of the materials, which provided her with a broader perspective of the available materials across the table. Her gaze remained centred on the toys as her hands moved the toys into different positions. Her absorption in play also prompted Lois to join her, who then adds a blue coloured boat into the landscape. At this point, Zena immediately offers a grounded logic that the boat symbolises the purpose of Capricorn, that is to help save young people from entering extremist groups. The act of Lois bringing the boat into the construction prompted Zena to offer rational insights behind the meaning of their landscape (which she has not yet provided), while simultaneously playing and freely moving toys across the table. However, Lois didn't share Zena's view and explained how Capricorn provide the tools (e.g. their workshops) to help save young people and it is the young people who save themselves. This interaction regarding the purpose of Capricorn originated from playful interactions and the building of a material landscape. The exchange between Zena and Lois draws attention to how tools serve as a

springboard for strategic debate (Burke & Wolf, 2021) and creating a shared understanding (Bürgi & Roos, 2003; Roos et al., 2004).

Another instance of actors being immersed in play is illustrated towards the end of Box 7, where Claire jokes that Zena is running away from the business. Initiating this teasing comment towards her manager indicates the playful atmosphere and mood of the room, which was sensed (Knight et al., 2024) by Claire and prompted her to initiate playful banter. Zena, also absorbed in play responded intuitively to Claire's jokey comment and physically acts out her exiting of the business by walking away from the table, thus continuing the playful and humorous exchange. Despite signs of being immersed in play and banter, the discussion of Capricorn's future appeared to be the anchor that prevented the continuation of humorous and playful practices, which prompted Zena to pull the team back towards familiar practices. This interaction demonstrates how actors were able to infuse logical reasoning into play and to self-manage the oscillation between periods of play and reason, depending on the direction of strategic debate.

For Rubix, the cycle of dwelling interplay manifested in a different form. Throughout the strategic episode for the Rubix team, obvious signs of enjoyment from play such as purposeful banter and laughter occurred less frequently. However, actor immersion in play and the oscillation between practices of play and reason occurred organically without facilitator intervention. Consider the vignette in Box 8. The process of escaping into play seemed to be more challenging for the Rubix team as they were often observed regressing back to familiar interactions and talking about their issues, without the use of material aids. However, the video-recordings captured instances of when the participants organically interacted with the materials and relied on the toys to support their ideas, which then uncovered further points of concern that catalysed subsequent strategic debate.

BOX 8 – RUBIX'S ASCENDING PLATFORM

The mood felt tense between the Rubix team members. They were discussing the pressures of not having enough students enrolling onto their teaching programme and conversation shifted to the importance of marketing to attract students and parents to come to their learning centre. Kylo looked down and sighed, looking visibly stressed and frustrated as he says "We don't know what we don't know. Like, we don't even know what marketing is." There is a pause from the team before Tam eventually comments that Kylo is "thinking too objectively." Tam then brings his gaze towards the material landscape that has been constructed by the Rubix team. He picks up a yellow circular platform made from Play Doh and slowly moves this up a Lego ladder as he explains "This is where we start. Then every week perhaps, we go up the ladder, eventually when we get to where we want to, we're on the platform. After one year, we get to the platform... This can be repeated, every single year." Kylo responds by saying he's unable to dedicate "quality time" to marketing and he expresses further concerns that their business strategy has changed too many times. (Field diary)

The vignette in Box 8 shows the Rubix team in the middle of a tense discussion regarding the future of the business and their unstable customer base (i.e. not having enough children attending their robotics and coding classes). The topic of marketing came up, to which Kylo laments that the team have no experience in marketing. In response to this, Tam draws attention to the toys and animates the materials to illustrate the gradual progress Rubix needs to make by slowly climbing up the vertical ladder. In this instance, Tam shifted toward practices of play by interacting with the materials as he explained how it will take a long term (maybe one year) before Rubix can have a continuous and reliable intake of students attending their classes. His animation also indicates that Rubix will go through phases of peaks and troughs.

The practice of play and material interaction is however short-lived as Kylo expresses his lack of time to dedicate to marketing. This prompts Kylo to further reveal concerns relating to their content delivery and how their strategy has changed too frequently "Just a few short few months ago [we had] like 15 courses, which was crazy. Now it's down to 2. To have such a drastic change like that takes a lot of time and effort." Kylo goes onto say how "last week when we had a conversation, you said it wasn't done… not to pick on you [Tam], but just as an example." Kylo revealing different topics of concern to him, such as the incomplete tasks, illustrates how Tam's interaction with the toys prompted discussion to spin-off into different directions (Burke & Wolf, 2021). While the concerns shared by Kylo were not always related

to organisational strategy, his concerns were directly related to workings within the team that would impact the pursuit of organisational strategy. Ultimately, while evident signs of joy and pleasure from play were not always evidenced during the cycle of dwelling interplay, the Rubix participants were observed self-managing their oscillation between play and reason and using physical and playful practices to convey meaning and understanding. The mood of the room contrasted to Capricorn's (depicted in Box 7), where there did not seem to be an atmosphere of playfulness or banter. Yet, organisational members showed their capacity to self-manage the oscillation between play and reason, where Tam injected moments of playfulness as he animated the material construction. Kylo then resumed familiar practices as he continued to share his concerns.

For the Blueberry team, the cycle of dwelling interplay served as a mechanism to enable Daemon and Mila to navigate through their challenges of being reliant on a single source of funding, that came from interested clients seeking to undertake Blueberry's course of workshops. Consider the vignette in Box 9. Daemon and Mila are seen oscillating between playing and modifying their material landscape by adding in different toys. With the addition of the toys, this prompted Mila and Daemon to share their personal reflections and worries regarding the current positioning of Blueberry.

BOX 9 – REALIGNING WITH BLUEBERRY'S VISION

Daemon and Mila were seen intently focusing on creating a material landscape for the current position of Blueberry. The landscape comprised a series of connected tubes in a relatively straight line. Daemon and Mila are both looking at the single connected pipeline before Daemon says "If you take that single source away, we have nothing at all." Daemon then proceeds to physically take a portion of the connecting tubes out of the material landscape. This prompts a discussion between Daemon and Mila about how Blueberry doesn't exist for profit but having a strong financial position is important for Blueberry to be able to reinvest those funds into the business. Daemon and Mila then modify their landscape and plastic green shrubs are placed inside a golden Lego trophy. Mila then explains how the shrubs represent money being re-invested into Blueberry. She goes onto say "This is where we're kind of supporting and giving back to like, local community because we are a social enterprise, we're about that community aspect." (Field diary)

From the vignette in Box 9, the toys served as a prompt to support Mila and Daemon as they navigated through their misalignment with their current organisational mission, that is to

support their community of entrepreneurs. Taking different material elements and using these toys to construct a material landscape enabled Mila and Daemon to craft a roadmap. Here, the Blueberry team would seldom assign meaning to the toys in isolation but when they were positioned in the context of their material landscape, the toys prompted Mila and Daemon to craft their roadmap to realign Blueberry's operations with their vision. This triggered Mila to reveal how she felt "this is what we've lost in the last year" given that Blueberry were prioritising "bids, grants and projects." In piecing together different components of their material landscape, Mila crafts out a roadmap that leads to the green shrubs inside the golden trophies, symbolising Blueberry giving back to the community the organisation was built to support.

The vignettes illustrated in this section indicate that participants do not always show obvious signs of liberation in play (e.g. sarcastic laughter and exaggerated body movements) or having a continued atmosphere of playfulness. Dwelling interplay draws attention to organisational actors being absorbed in the activity and interacting with materials intuitively and without thinking. Taking materials and animating them or moving them across the table freely and confidently were indicators of actors being immersed in the practice of play, even though more obvious signs of play (e.g. humorous comments) were not always present. Dwelling interplay also draws attention to organisational members self-managing the oscillation between play and reason, with significantly reduced guidance from the facilitator. In gaining the confidence to play, organisational actors did so intuitively and without facilitator encouragement. Through this self-oscillation, two further process affordances emerged from this combination: cultivating more interesting wants and then grounding these newfound wants in reality.

4.4.1 Cultivating more interesting wants

Cultivating more interesting wants and exploring new possibilities occurred through a physical interaction between the actor and the material, where organisational members unlocked their creative potential by drawing on different material aids, which prompted imaginative thinking. As actors became more confident and visibly more comfortable with physically interacting with the toys, organisational members showcased instances of thinking outside established boundaries and current practices. For example, for the Capricorn team, Lois was playing around with some elephant figures with building blocks on their backs. The Capricorn team had added building blocks onto the elephants, to symbolise Claire, Zena and Lois being tasked with jobs they believe they shouldn't be undertaking (e.g. Zena and Lois booking accommodation and transport for facilitators to deliver workshops). Upon Lois removing these

blocks from the elephants, Claire responds with a loud and elongated “Yeah.” Zena then proceeded to place a Lego person on top of each elephant, which prompted Lois to tun the elephants so that they were facing different directions (Figure 4.6). Lois then explained how she was one elephant and builder who was focusing on research and Zena was another elephant and builder, targeting corporates. Zena immediately punched her fist into the air and responded with an elongated “Yes” as Claire had done previously.

Figure 4.6: Capricorn’s newly developed goals

By immersing themselves with material interaction, organisational members showcased their capacity to think outside established norms and were guided by the materials and visual cues to discover new goals (March, 1971). For Capricorn, this manifested in the pursuit of new funding streams coming from research and corporate sectors, rather than continuing to pursue workshop delivery in schools. By physically removing the building blocks from the elephants, Lois visually showed her intent to step away from the day-to-day running of Capricorn and focus less on their current business model, that is delivering workshop in schools. This was much to the delight of Claire who expressed interest to pursue “really dynamic and interesting” projects that contrasted with but also compliment the purpose of Capricorn. Zena’s addition of Lego people inspired Lois to put forward the idea of her and Zena focusing on research and corporates as new diversification options to Capricorn. Material interaction thus provided actors with the space to first do without thinking, which allowed them to realise their imaginative ability and resulted in the materialisation of more novel and interesting wants (March, 1971).

4.4.2 Grounding newfound wants

Grounding newfound wants in reality occurred as actors ceased their expressive bodily dynamics as they regressed back towards logical thinking in order to understand how newfound wants could be implemented in practice. In their collective construction, Mila and Daemon created a material landscape with Lego bridges and hurdles made of building blocks in the middle of the landscape. Daemon revealed his concern that Blueberry is unable to progress towards the medium and long-term as he and Mila are preoccupied sustaining the short-term viability of Blueberry. In doing so, Daemon shares his reflections of Blueberry being "stuck" in short-term operations.

> "I think capacity falls in this stage [start of construction], whereas we've seen, because of all hands on deck, there's no one working on these bids [points to the hurdles in the middle of the construction]. Ideally, whilst all this is happening, somebody is still chipping away here [in the middle of the construction]. But year, that's always been something, that's where capacity is short. Once we can move these to here [proceeds to move the aardvark to the middle of the construction], again as you say, because of cash, it's just getting something so we can go there." [Daemon]

While Daemon was expressing his concerns regarding the challenges of having a lack of resources, Mila was seen looking through the boxes in search for toys. She then added different animal figures to the landscape. Afterwards, Mila also echoed Daemon's sentiment, and she expressed her concerns regarding the acceptance of projects that do not always align with Blueberry's mission, but are accepted in order to keep the business running. The shared discontent between Daemon and Mila prompted them to engage in practical thinking, which resulted in the mutual agreement that Blueberry needed more team members to accommodate demands facing the organisation. However, this proved to be an unrealistic solution given the resource constraints facing Blueberry already. In adding animal figures to the material landscape, Mila expressed her view for Daemon to hire more core team members, but the practicality of this solution when grounded in reality proved to be unrealistic, given resource limitations. While play offered participants a mechanism to generate new ideas, there was also scope for these ideas to be brought back to reality. This process revealed how ideas were not always implementable and that the ideas from play in strategy can often be redundant.

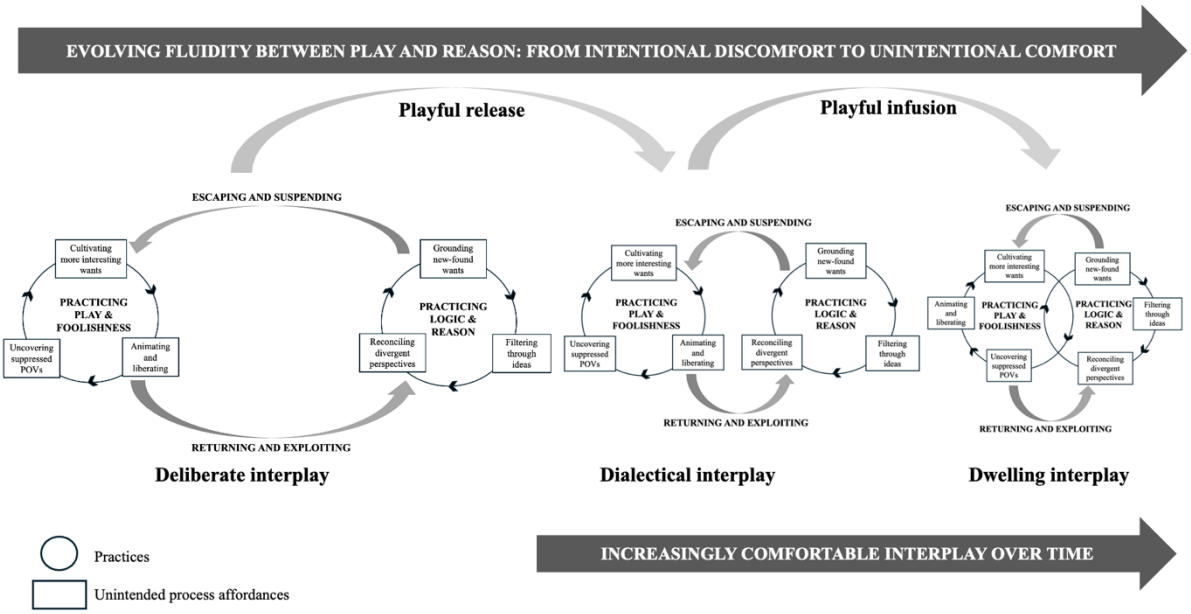
4.4.3 Summary

The final phase during the interplay between play and reason encapsulates the self-regulation of actors as they manage their own oscillation between play and reason, based on their own feeling and intuition. This proved essential as actors displayed signs of being absorbed in play and being truly 'in-the-zone' before then being pulled out of this playful state to then ground ideas in reality. By this stage, organisational members appear confident and comfortable with playing and seem relaxed as they engage in playful encounters before then assigning meaning in retrospect. Dwelling interplay showcases how, in line with a changing atmosphere and mood of the room (Knight et al., 2024), organisational actors can become absorbed in the practice of play.

4.5 The interplay between play and reason

This chapter has sought to unpack how play and reason unfold during strategy making sessions. Through a fine-grained analysis of the sociomaterial interactions between actors and between the actor and the material, the process model (Figure 4.7) below illustrates the evolving fluidity between play and reason during strategy-making episodes. Each of the three cycles (deliberate, dialectical and dwelling interplay) within the evolving fluidity released unintended process affordances (Burke & Wolf, 2021; Gibson, 1977) that emerged through practicing play and foolishness and practicing logic and reason. These affordances are depicted as being constituted within the cyclical process of temporarily suspending rational imperatives (March, 1971) to enable escaping into play, before being pulled back into logical thinking and exploiting newly generated wants.

Figure 4.7: A process model of the unfolding interplay between play and reason



At the start of the strategy episodes, organisational members displayed signs indicating their visible discomfort and reluctance to practice play (e.g. arms crossed, minimal material interaction, using pen and paper rather than toys). Actors therefore began with deliberate interplay where moments of play were intentionally forced and actors continued to follow pre-determined goals (Chia & Holt, 2010). Organisational members were pushed to engage in playful behaviour through facilitator involvement and actor swiftly resumed familiar work practices at the earliest instance. In line with the building mode of strategising (Chia & Holt, 2006), during *deliberate interplay*, actors showed signs of purposeful and intentional engagement with the toys. Periods of play and reason were distinctly separate with the latter dominating the first phase of evolution. This phase also showed a tension between the process of escaping into play and returning to logic and reason, where actors were challenged with the process of escaping and immersing themselves in an environment of play.

Gradually, actors began to experience a playful release where signs of pleasure started to emerge in a process of *dialectical interplay*. Through playful release, organisational members appeared more relaxed and confident in managing the competing forces of play and reason. A more organic interaction with materials began to appear, which resulted in signs of joy and pleasure to transpire (e.g. laughter and open-mouth smiles). However, participants were also faced with opposing forces of logical reasoning, which caused actors to regress back towards familiar practices. The struggle between competing forces of play and reason during dialectical

interplay (Gottlieb, 1972) prompted actors to filter through their ideas and unearth hidden gems and realise new changes.

Over time, actors seemed to grasp the art of playing and temporarily suspending established work practices and were able to fully immerse themselves in play and participate in a process of *dwelling interplay*. Actors eventually underwent a process of organic oscillation and self-managed practices of play and reason where the two forces became infused. These dynamics illustrate the progression from intentional discomfort in practicing play and reason towards unintentional comfort where actors exhibit relaxation and a deep immersion as they manage the competing forces of play and reason. Here, actors were in an absorbed state of play as they showed signs of immersion in the activity (Chia & Holt, 2006) and were responsive to environmental (Chia & Holt, 2023) and even atmospheric changes.

The evolving fluidity also saw the surfacing of various process affordances that occurred as a result of the interaction between play and reason during the strategy workshops. These process affordances however are not specific to a given cycle during the process of evolving fluidity and can arise during any stage during the interplay. Rather, they are constituted through the recursive interplay between practices of play and reason. The findings from this chapter thus extend our understanding of how process affordances (Burke & Wolf, 2021; Gibson, 1977) can emerge from purposive action, namely through playful and purposefully purposeless actions and interactions. Studies on affordances (e.g. Faraj & Azad, 2012; Gibson, 1977; Leonardi, 2011) have generally pointed towards the advantages of actors using materials in ways that go beyond their intended use. The process affordances highlighted in this study offer two further insights.

First, given the creative and imaginative nature of the strategy workshop, the affordances that manifested did not always directly support actors in tacking strategic challenges. However, their value emerged in alternate forms e.g. reaching common ground by reconciling divergent perspectives and improved emotional experiences (Roos et al., 2004). Second, the processes that emerged as a result of the interplay between play and reason enabled the surfacing of tensions and viewpoints that had been previously suppressed. While the unveiling of these sentiments was also not directly associated with strategic decision making, such tensions impacted team working and dynamics, that in turn affected the realisation of organisational strategy. Through play, actors created an environment and atmosphere (Jørgensen & Beyes,

2023) for emotional expression (Statler et al., 2011). As reflected in the quote below, Mila expresses how through play, she felt more able to express her concerns to the CEO.

> "So a lot of the things that I haven't said that I've probably like felt was helpful to go through in the workshop because it was actually like, this is what we're talking about, as like play, instead of like, this is what's going wrong. And I'm telling him [Daemon] what's going wrong in his company. So that was quite nice to be able to do that. And I think I got some things out there that I wanted to, like say without coming across that I was being argumentative." [Mila]

The process affordances provided organisational actors with the means to bring to surface suppressed emotions and internal tensions and for these tensions to be addressed in the context of play. These were the tensions between the organisation members that emerged because of the interplay. The data also pointed towards tensions that occurred across the different workshops. First, the tension between escaping into play and regressing back to reason. Second, the challenges of the evolving fluidity having wider organisational impact

4.5.1 Tensions and challenges during the evolving fluidity

The evolving fluidity between play and reason depicted two key tensions that emerged between the interplay between play and reason. Drawing on March's (1971, 1999, 2006) work of sensible foolishness, this chapter zoomed in on the sociomaterial practices of how actors "escape the logic of [their] reason" (March, 1971, p. 261) and temporarily suspend rational organisational imperatives (March, 1971). The process of escaping into play and then returning to logical thinking was a central tension that remained throughout the interplay between play and reason, though this tension became more manageable during dwelling interplay. March (1971) put forward play as a mechanism for actors to escape their logic of reason but few studies empirically captured how the process of escaping unfolds in the context of strategy making workshops and how actors do this in practice.

The video-recorded data showed how organisational actors demonstrated physical signs of reluctance (e.g. crossing their arms and sitting back in their chairs), indicating their unwillingness to play. The presence of the materials proved to be useful props to support the escape into play, where actors gradually used the toys as symbols (Piaget, 1945) and pivots (Vygotsky, 1933). However, organisational actors continued to demonstrate a visible desire to return to familiar practices and were often observed physically withdrawing from the materials and resumed unimodal forms of communication using discourse. While returning to

established practices was necessary in order to bring creative and imaginative ideas back into organisational reality, the suspension of rational practices was often cut short, with participants preferring to resume familiar practices. The evolving fluidity between play and reason shows how tensions between escaping into play and returning to reasoned intelligence are constructed through actor interactions and how the participants themselves can collectively manage this tension (Jarzabkowski & Lê, 2017) by using the toys as prompts to engage in humour or deciding to bring a playful exchange to a close by grounding ideas in reality.

Second, there was the challenge relating to the ideas generated during the process of evolving fluidity and whether these extended beyond the scope of the strategy workshop for the wider organisation. While prior studies have examined the practices and interactions through which strategy is performed in such episodes (Hendry & Seidl, 2003; Jarzabkowski & Seidl, 2008; Johnson et al., 2010), these studies generally find that ideas and findings from workshops do not always translate back into organisations. The findings from this chapter show how the emotional involvement in strategy from play (e.g. signs of enjoyment and revealing suppressed viewpoints) helped to create a deeper commitment from actors, which supported the translation of findings into their organisations. The post-phase of data collection revealed managing directors and CEOs conveying findings from the workshop to the wider organisation. However, the post-observations showed an omittance of playful practices as organisational members resumed familiar working practices that aligned with what March (1971) calls reasoned intelligence. The findings from this chapter reveal how organisational members demonstrated a greater commitment to the ideas generated from the workshops, as these were conveyed to the wider organisational team. The process of evolving fluidity was thus limited to the workshops and the translation of this process back to wider organisational practices remains a challenge.

4.5.2 Summary

The theoretical process model for the evolving fluidity between play and reason showcases the three different phases that characterise the interplay between play and reason. This model shows how over time, organisational members display signs of gaining an unintentional comfort with play and through a playful release and playful infusion, the distance between play and reason becomes smaller. The two forces eventually infuse as actors become absorbed and self-manage the oscillation between the two forces. However, during the evolving fluidity, there is an ongoing tension between the process of escaping into play and then returning to

logic and reason. These tensions can be both fuelled and mitigated by organisational actors and are thus, collectively constructed through actions and interactions.

4.6 Conclusion

This chapter aimed to explore how sensible foolishness (play) and procedural rationality (reason) unfold in the context of strategy making episodes. Findings concur with existing serious play studies (e.g. Jacobs & Statler, 2006; Roos et al., 2004; Statler et al., 2011) and March's (1971) proposition that play can serve as a valuable complement to procedural rationality in the context of strategy-making episodes. Findings also show how play can serve as a bridge between "building" and "dwelling" modes of strategising (Chia & Holt, 2010) where the use of playful stuff (e.g. toys) in strategy workshops can facilitate foolish interactions and purposive action (Bouty et al., 2019) to support the generation of new ideas and insights. In particular, this chapter offers two key contributions to SAP scholarship.

First, findings reveal the dynamic interplay that focuses on the process and practices actors draw upon when they engage play and reason during strategy workshops. Findings showcased three cycles of deliberate, dialectic and dwelling interplay that illustrated how play and reason unfold during strategy making workshops. The recursive process illustrated a transition from intentional discomfort to unintentional comfort in engaging with playful practices during strategy-making where deliberate interplay demonstrated a purposeful and visible forced engagement with toys and effort to play, aligning with the building mode of strategising (Chia & Holt, 2006). Gradually, signs of unintentional comfort started to emerge with dialectical interplay and how actors realised change through the contradicting forces (Gottlieb, 1972) of play and reason. Actors eventually self-managed the oscillation between practices of play and reason during dwelling interplay, where actors became absorbed in the activity and self-managed the oscillation between the two practices. This evolving fluidity also sheds light on the sociomaterial manifestations that emerge from the interaction between the two seemingly opposing forces.

Second, we shed light on how March's (1971) sensible foolishness is actually performed in practice. March's work has generally related to entire organisations, rather than singular workshops. Scholars who draw upon March's (1971) sensible foolishness mirror March's articulation and also apply this concept in broad organisational terms (e.g. Ocasio et al., 2019) or in terms of leadership (Thaning et al., 2020). This findings chapter deliberately zooms in on

the empirical sociomaterial interactions to explore how actors perform sensible foolishness *in practice*. Analysis revealed an evolving fluidity between play and reason that showed how organisational actors progressed from a visible discomfort to an unintentional comfort, that supported the generation of new ideas and insights. Process affordances also emerged indirectly as result of the recursive interplay between play and reason. The evolving fluidity is thus consequential (Jarzabkowski et al., 2021) for organisational members given that the activity of purposive interaction with toys supported generative strategising. This chapter also pointed towards how actors presented different versions of themselves (Goffman, 1956) through play and this leads to the next findings chapter, which explores how these shifting modes of interaction impact prevailing organisational norms. The next chapter will unpack how existing power dynamics are suspended for a transient time through play.

CHAPTER 5:
THE TEMPORARY SUSPENSION OF HIERARCHICAL NORMS

5.1 Introduction

The previous chapter explored the interplay between practices of sensible foolishness (play) and procedural rationality (reason) and how these two practices unfold during strategy-making workshops. Findings revealed an evolving fluidity where organisational actors escaped into play and temporarily suspended rational imperatives (March, 1971) and the tensions between the two forces. During the interplay between the two practices, actors displayed instances of taking on different roles, where non-managerial employees were observed taking the lead and directing the progression of the workshop. This coincides with Bakhtin's (1981) ideas of how play can suspend normal hierarchies for a transient time. However, Bakhtin's (1981) work relates to how children can explore and challenge power dynamics and so this chapter advances our understanding of how play can serve as a mechanism to enable participation in strategy and the role of play in mediating existing power dynamics.

Within organisations, power relates to hierarchical structures, which has been labelled as legitimate power (Hardy & Clegg, 1996), where A's power over B "is a function of how much B believes that A has the lawful authority to influence B" (Kim, Pinkley & Fragale, 2005, p. 800). Power is also viewed as being embedded in structures and norms (Fleming & Spicer, 2014) but these power dynamics can evolve and change through interactions (Fleming & Spicer, 2014; Kuhn, 2008) where the data-set of video-recorded episodes revealed how non-managerial employees showed signs of gaining confidence to shape the direction of strategic debate and thus, challenge established hierarchical structures. This insight is theoretically significant because prior research indicates that power asymmetries and formal boundaries may obstruct inclusive strategy making, which may result in a employees demonstrating a lack of commitment to implementing strategic initiatives (Hautz et al., 2017). Other risks of keeping strategy exclusive centre on missing out on potentially valuable ideas from employees at different levels and wider stakeholders (Whittington et al., 2011). The analysis and findings from this chapter show how play offers the promise to temporarily dissolve these inhibitors to promote strategising inclusivity. Thus, this chapter aims to delve into this process by addressing the following research question: How can play in strategy temporarily suspend existing power dynamics?

Prior research has already pointed towards the benefits for organisations if strategy work is widened to include different stakeholders (Brielmaier & Friesl, 2023). However, research has also discovered inhibitors of enabling wider participation in strategy. Scholars have found that the risk of conflict, contentious debates and even personal attacks that may arise from widening strategy, which may deter organisations from fostering greater strategic inclusion (Hautz et al., 2017). Existing hierarchical structures also mean employees tend to be detached from strategy work due to having a lack of knowledge and/or information regarding organisational strategy, so they find themselves in a position being unable to offer input (Stjerne, Geraldi, & Wenzel, 2024). Others have found that employees may also feel reluctant to share ideas and/or their concerns due to hesitancy to speak up (Stieger et al., 2012). Employees may therefore lack the confidence to contribute to strategy-making due to inherent hierarchical structures and legitimate power. Such impediments from existing power structures prevent potentially fruitful insights to be gathered from a wider pool of contributors. This underlines the importance of the research question, that seeks to uncover the process of how participation in strategy can be enabled by temporarily suspending existing power dynamics.

To address this question, this chapter will be split into four sections. First, this chapter will illustrate (through vignettes) the existing power dynamics in place at each of the organisations (prior to organisational employees attending the strategy workshop). This is necessary so that a full picture is presented of how these power dynamics changed during the course of the workshop through a temporary suspension. The second section will delineate the sociomaterial micro-interactions that helped construct an inclusive space to enable the transformation of power dynamics. The third section will present a recurrent process of how play can level the playing field by suspending power dynamics for a given period of time. This process is referred to as levelling the playing field, which comprises three phases: *reinforcing*, *flattening* and *considering*. The fourth section will explain how the generated ideas from the workshop were translated into wider organisational strategy but also the limitations of only temporarily suspending hierarchies. This chapter will conclude with a summary of the main contributions from using play as a mechanism to temporarily suspend existing power dynamics.

5.2 The former playing field

Drawing on data collected during the pre-phase including interviews and observations, this section will begin by delineating the present working structures at each of the case organisations, with particular attention to how existing hierarchies impacted (a lack of) contribution, involvement and participation during strategy meetings. While each of the case organisations are SMEs, there was still an apparent divide between managers / CEOs / co-founders and non-managerial employees and this was especially observed during the observations. In other words, hierarchies were still in place at these small organisations, where it was very much the desire of these managers to influence, dictate and have control over organisational strategy as reflected in the quote from Rubix's managing director, "There's a lot of things that I want to set in stone for the business" as well as in Capricorn's co-founder's reflections that she would like to have "more expectation [from the team]" and move away from being "accommodating" and that she and her co-founder will "try and sort everything out". In line with the understanding of legitimate power (Kim et al., 2005), organisational employees appeared to accept their position within established hierarchical structures. Consider the vignette in Box 10. Here, the Capricorn team are in a strategy team meeting with Lois and Zena presenting to the team the new organisational strategy for Capricorn.

BOX 10 – ZENA OUTLINING ORGANISATIONAL CHANGES

Zena had previously sent an email out to the entire Capricorn team (myself copied in), informing them of a strategy meeting that would be taking place, and they were all expected to arrive on-time at 09:00. The meeting began with Zena getting up from her chair and making her way to the front of the meeting room to begin her PowerPoint presentation. Lois remained seated at the front and close to Zena, where she would at times interject and expand upon Zena's comments. Zena set out an agenda for the meeting and proceeded by providing an outline of a series of changes that she and Lois intend to implement at Capricorn. Namely, the on-boarding of new full-time staff and how she and Lois will be exclusively stepping away from the day-to-day running of Capricorn to enable them time to focus on organisational strategy. Throughout her presentation, Zena didn't invite the team for reflections or questions. Equally, the team did not volunteer to ask Zena any questions about her proposed changes. As was normal in these team meetings, the rest of the Capricorn team remained silent as they listened to the new changes being outlined, without questioning the plan at any point. (Field diary)

During her pre-interview, Zena expressed how she felt that she and Lois were too "accommodating" and "flexible" of their employees, resulting in them being tasked with mundane tasks (e.g. transport and accommodation bookings for facilitators), which prevent them from crafting out organisational strategy. Zena's reflections suggest that the hierarchical structures are not so engrained within Capricorn. However, the observation of team meetings (as evidenced in Box 10) present a contrasting view, where Zena informs the team of changes that will be made and she does not engage in dialoguing with the team (Gegenhuber & Dobusch, 2017) or invite their thoughts. Hence, data from the pre-phase presents conflicting ideas regarding the power structures within Capricorn. During the day-to-day running of the business, hierarchical structures seem to fade because of Zena and Lois being tasked with 'mundane' work they believe falls outside their remit as co-founders of the business. However, during formal meeting spaces, Zena (and Lois) reside firmly in their positions as co-founders as they dictate the direction of the business with a lack of contribution from the wider team, who were not invited to share their views, nor did the employees volunteer to contribute. Given this was the case across team meetings when Zena and Lois presented changes or information regarding organisational strategy, power structures were evidently still in place at Capricorn, particularly during formal meetings where there was an apparent lack of inclusion (Hautz et al., 2017).

For Blueberry, while the core team comprised just three team members (the CEO, COO and sustainability lead), evidence of hierarchical structures preventing non-managerial from contributing to strategy surfaced during the pre-phase of data collection. For example, during his pre-interview, Daemon explained how he was responsible for setting out organisational strategy and he would "make decisions myself" and "crack on with [strategy]" himself. It was clear that Daemon didn't invite the views of his COO, sustainability lead or the mentors employed by Blueberry. Instead, Daemon would work on defining organisational strategy and he would communicate new organisational strategy and changes in the business to employees through a "five-minute video" that Daemon would record of himself and email to members at Blueberry. This is echoed in the sustainability lead's interview, where Mila expressed that "I don't really have a say in kind of like, the overall strategy" and that she's "not really at all" involved in strategy. Mila also expressed that while she isn't involved in the crafting of Blueberry's strategy, she is "kept in the loop of what's going on" during her "weekly catch ups" with the CEO and COO. The pre-interviews thus revealed how strategy making at Blueberry remained exclusive (Gegenhuber & Dobusch, 2017), with decisions and direction of the business being set out completely by Daemon. Despite an obvious lack of inclusion in

strategy-making, there appeared to be a degree of transparency (Hautz et al., 2017) where Daemon would engage in efforts to communicate Blueberry's strategy to the wider team through recorded videos, and to the core team verbally during in-person meetings. Consider the vignette in Box 11. During these meetings, Daemon was seen directing the progression of the meeting and emphasising tasks to fulfil Blueberry's short-term strategy.

BOX 11 – DAEMON LEADING THE WAY

The meeting began with Daemon and Oli sat on opposite sides of a large table in a meeting room. Mila joined this meeting online and her face was seen on the projector. Daemon would always direct the progression of these team meetings. He would usually start by inviting Oli and Mila to share their new leads and potential incoming projects for Blueberry. Oli and Mila do as instructed, each providing an update on their respective projects. Oli mentions that it's difficult for him because he often doesn't hear anything back from his leads. He suggests that being more specific on what Blueberry can offer to these businesses would help generate a response. Daemon nods and agrees and asks Oli and Mila to do this from now on. After updates have been provided, Daemon then moves the meeting onto discussing "priorities now", which relate to Blueberry's short-term strategy, that is focused on achieving a regular stream of incoming businesses. Daemon emphasises the importance of them being "proactive in chasing funds" to which Oli and Mila nod in agreement. (Field diary)

The vignette in Box 11 illustrates how Oli and Mila, while they work closely with their CEO, the dynamic was that they were to do as instructed and were not involved in the crafting of Blueberry's strategy. Box 11 reveals Daemon emphasising that the strategy for Blueberry in the short-run is focusing on "chasing" leads to bring in funds for the businesses. During the meeting, Mila and Oli did not raise any objection to this strategy and followed the instructions of their CEO. This further emphasises the exclusivity of strategy-making at Blueberry, residing with the CEO. However, during his pre-interview, Daemon explained how he wanted to build a more diverse board of directors to gain a wider perspective. He explained:

> "I felt that we needed to widen the board, getting a bit more perspective, maybe introduce some non-exec directors." [Daemon]

During his interview, Daemon expressed a keen desire to involve the board of directors in strategy-making. Thus, this would involve other actors in the strategy-making process, but these actors would still be considered as 'elite' members of the organisation (Whittington et

al., 2011), that are traditionally involved in strategy work. As revealed from observations and interviews, Blueberry's playing field was very much dictated by the CEO who demonstrated a desire to involve board members in strategy making, rather than his wider team. This resulted in core members of the team keeping their ideas to themselves and were not observed contributing their opinions to strategy decisions when these were shared with them.

The managing director at Rubix shared a different perspective on strategy development, though this perspective still aligned with the dominant view that strategy should remain with the 'elites' and select individuals in the business. In his interview, Kylo disclosed that Rubix's strategy is defined and set out by himself, and his reasoning is because he finds that when more people are involved in strategy and their views do not align, this causes difficulties, as seen in his quote below.

> "I've tried to get more people involved in [strategy in] the past and I think with strategy, unless two people are like, clearly aligned and understand their particular roles, it's really difficult to co-strategise... It's not always the best thing for everybody to give an opinion." [Kylo]

From his pre-interview, it was evident that Kylo preferred to engage in strategy work alone. He comments on the difficulties he experienced when others have been involved in strategising and the challenges of having different opinions being raised during strategy-making. These reflections underline entrenched beliefs about who participates in strategy making and adhering to the status quo that only managers and top leaders are in a position to make strategic decisions (Eisenhardt & Zbaracki, 1992). This may potentially lead organisations to miss out on the benefits of more inclusive strategising, such as idea generation (Whittington et al., 2011) and commitment from employees (Hautz et al., 2017). Tam, Henry and Adam are all involved in creating and developing content for Rubix's coding and robotics courses. They emphasised how they are "really creative" and such creative sparks have the potential to offer new insights in strategy-making, which are currently omitted due to strategy being shaped by Kylo and his view that 'too many opinions' could be challenging. As Adam explained, employees within Rubix also seem to accept this 'natural' order of hierarchy with strategy-making being shaped by Kylo.

> "[Kylo] is the one who makes the decisions… we'd have some sort of communication on certain decisions however, the final decision is his… because he's the managing director, he gets his way. So if he makes a decision, you go with it." [Adam]

Adam's reflections indicate the prevalence of legitimate power within Rubix, where Kylo holds authority to shape and direct organisational strategy given his position as managing director of the organisation, which is accepted by wider organisational actors. Other members of the team are seldom included in the process of strategy making and instead, they obediently follow Kylo's instruction. Consider the vignette in Box 12. While this particular meeting was not focused on organisational strategy, it shows the conflicting views of the team and how Kylo has the final say.

BOX 12 – KYLO REACHING A CONCLUSION

Kylo had scheduled a meeting with Henry, Tam and Adam to see how the team were progressing with creating the teaching notes, which were needed for when the Rubix centre opens and children begin attending the robotics classes. The meeting took place virtually via Google Meets. When Kylo asked Henry for how far he was progressing with the teaching notes, Kylo looked visibly disappointed as he sighed deeply and rested his head on his hand, when Henry told him the teaching notes were not ready. Kylo then addressed the team as a whole and emphasised that it had been three weeks and the not a single lesson plan was ready to be delivered. There was no response from the team. Kylo then asked "What do we think is the problem?" to which Henry responds that he would like to collaborate more with the team. Adam responded that he feels the workload of creating the teaching notes is too much for him and Henry. Henry said he feels he's not ready to be working on the teaching notes. This prompts Adam to suggest the team should have a daily two-hour meeting, to which Kylo firmly objects by saying it is not a good idea. The meeting concludes with Kylo summarising that the goals for this week would be the same as the previous week. (Field diary)

The vignette in Box 12 underlines what participants revealed in their interview. Hendy and Adam shared different views on how they would like to progress with the teaching notes. Ultimately, Kylo makes the final decision that the team will progress as they currently are with the same workload (despite Henry expressing his concerns) without further meetings (as Adam suggested). The team accept Kylo's decision due to inherent power dynamics in place and the recognition that decision-making power resides with Kylo. This working dynamic has proven difficult for Kylo, as while the team do not raise objections to Kylo's instruction, they at times fail to deliver, which is of concern to Kylo. As he explains:

> "If people don't do it [their tasks], there's no backlash… it's just like okay, you didn't do it." [Kylo]

The pre-interviews and pre-observations for Rubix revealed different challenges facing Rubix and the managing director. The low inclusion norms resulted in reduced commitment from the wider team, who failed to deliver on promised tasks, which was of serious concern to the managing director, who explained there was no consequence for failing to perform. Despite adherence to formal hierarchical boundaries, members of the Rubix team expressed they had a degree of freedom after Kylo had given them instruction, as reflected in the quote below:

> "I've got freedom in that part of the task. However, the task itself and how it was set, that's all predetermined by [Kylo]." [Adam]

In sum, there appeared to be a mutual understanding within Rubix. Kylo perceived strategy-making as his domain and preferred to do this task without the input of other organisational members. The wider Rubix team also recognised that decision-making power belonged to Kylo and followed his direction and instruction. However, as participants revealed in their interviews, the Rubix team did have some level of autonomy when it came to performing their designated tasks. For example, Adam had freedom to develop gaming and robotics courses, once Kylo set out instruction for the team. This is an example of *restricted power*, where the team had a degree of freedom to manage their own tasks within the limits imposed by managers.

To summarise, the purpose of this section has been to illustrate the precedence of power dynamics and hierarchical structures that appear engrained within each of the case organisations. Findings adhere to the traditional perspective of strategy, where strategic decision making is undertaken by corporate elites (Birkinshaw, 2017; Whittington et al., 2011). Across each of the case organisations, the top leaders of the businesses viewed strategy as 'their' domain and did not seek to include wider organisational actors in the process. With the exception of Blueberry's CEO, who expressed the intention to have board members involved in strategic decision making but not the wider Blueberry team. These power asymmetries prevented inclusive strategy making as non-managerial employees, who also accepted their position in hierarchy and that participating in strategy resides outside their domain. Despite the lack of inclusiveness in strategy, the data from the pre-phase showed a level of transparency as executives would make efforts to communicate the defined strategy to the rest of the organisation. Upon being informed of organisational strategy and/or changes in the business, non-managerial employees would often remain neutral and choose to not voice their opinions.

The next section of this chapter will unpack how the strategy workshops provided a space for organisational actors to temporarily suspend these engrained hierarchical structures. In particular, the following section will focus on how a playing field is created to enable non-managerial employees to contribute and participate in strategy within new strategising spaces.

5.3 Creating a playing field

In this section, I uncover how the practice of playing in strategy temporarily dissolves structural and normative inhibitors (as highlighted in the previous section) within organisations to promote more inclusive strategy-making and the participation of non-managerial employees in crafting out organisational strategy. The video-recorded data evidenced how playing is able to achieve this, in part, by empowering 'creators' to generate and express meanings in action. During the recorded workshops, organisational actors share their thoughts, opinions and viewpoints on organisational strategy through physical and metaphorical constructions. In other words, these actors were the 'creators' of their own materialised ideas and opinions and because of this, the viewpoints of non-managerial actors in particular, I will show, are not so easily dismissed by managers because they elicit responses that are both playful and serious. This section will uncover three key themes that emerged from the data that underline the importance of having and creating spaces that enable playful and logical action. To create a playing field for sensible foolishness and logical reasoning, the data revealed the value of organisational actors physically relocating and moving their training grounds, how employees felt empowered as 'creators', and the significance of team spirit. Put together, these criteria created an environment and atmosphere (Jørgensen & Beyes, 2023) that paved the way for hierarchical norms to be manipulated and temporarily suspended.

5.3.1 Moving training grounds: A new environment for strategising

A key insight that emerged from the post-workshop interviews centred on the workshops taking place in a new location that was outside the participants' working office spaces. As part of the research design, the decision to purposefully locate the workshop outside the participants' office spaces was to help organisational actors create the mood of play and to help enable participants to have a 'not at work mindset' (Roos et al., 2004). Having the workshop in a neutral, off-site location is also in line with what previous serious play studies have also conducted, where these studies explored the use of playful means to achieve serious workplace objectives (Roos et al., 2004). This off-site location proved to be vital in

laying the foundations for hierarchical norms to be dissolved. In their post-workshop interviews, participants revealed how they felt because the strategy workshops took place in a new environment outside their office space, they felt the hierarchical boundaries (illustrated in the previous section of this chapter) were less present, as Adam from Rubix explained below. He explains that none of the Rubix team had any "ownership" and because of this, the team were therefore working at the same level. Previously, as evidenced during the pre-observation phase, Kylo had ownership and resided on a higher hierarchical platform compared to the rest of the team.

> "Definitely there was less of like a boundary with the hierarchy… we were in a different environment… none of us had any sort of ownership." [Adam]

A similar sentiment was shared by Mila from Blueberry, who commented in her post-workshop interview that because the workshop took place outside her office space, she and the CEO were "new people" and perhaps 'outsiders' in a new environment. Given they were both experiencing the new setting for the first time, this helped Mila to remove herself from her 'working' mindset that had imposed hierarchical structures, as she explains in the quote below. This change in mindset is crucial to enable non-managerial actors feel that they are able to participate in strategy and that strategy can be part of their working domain and does not solely belong to managers.

> "Because we're both like, new people in the space and I think it also helped me to like, get out of the mindset." [Mila]

Moreover, Claire from Capricorn revealed in her interview that because the strategy workshop took place outside her normal office space, she was "removed" from her working practices. In particular, she emphasised that her working materials like her laptop and the rest of her "stuff" wasn't near her. As a result, this prompted Claire have the impression that the strategy workshop would be different to her daily routine. In other words, the new physical setting and being without her materials also facilitated the impression that established working norms (i.e. power structures) were also left behind in her physical office space. Being without her normal working possessions in a different space thus supported non-managerial employees in adopting the 'not at work' mindset. This in turn holds promise for non-managerial employees to temporarily act and behave without the imposed hierarchical boundaries in place in her usual working environment, as she reflects in the quote below. This coincides with Goffman's (1956) dramaturgical analysis where actors have the ability to present a different version of themselves in different scenarios (Mead, 1964).

> "The room was set up and it had the toys in it and immediately you arrive and you think something interesting is happening. It removes you, I suppose from kind of like your workload. Like the fact that I didn't have my laptop nearby. It wasn't open, like my stuff wasn't nearby. It was all kind of like removed." [Claire]

In summary, the reflections from non-managerial employees from each of the case organisations revealed the significance of the strategy workshops taking place in a neutral off-site location that created a different kind of space (Jarzabkowski, Burke, & Spee, 2015), which holds potential for wider participation in strategy. This was particularly significant for their views on hierarchical structures and because of the neutral setting, these organisational actors felt that they *could* act and behave in a manner that was not confined to existing power structures that were in place within their office setting. The reflections from participants thus underlined the implications of where strategy work takes place and by physically relocating strategy to take place in a new and neutral environment for all organisational members, this can begin to enable the suspension of hierarchical structures.

5.3.2 Empowering the team

The second theme that emerged from the video-recorded data was the empowerment of team members, namely the non-managerial employees. The process of playing and the participants materialising their ideas and viewpoints provided them with a means of empowerment, as they were the creators of their material construction, which was generated from both play and reason. Consider the vignette in Box 13. This scene where Mila builds a horse on wheels shows how play provides actors with the space to materialise immaterial ideas. Through this materialisation, this facilitates other actors in understanding and seeing the opinions of others, which underlines the generative ability of play in strategy-making.

BOX 13 – BLUEBERRY'S HORSE ON WHEELS

Mila began to build her construction, looking intently at the available materials and picking out various toys to bring to the centre of the table. She is then observed happily piecing together some different objects and her masterpiece appears to be a horse figure on wheels with wings. Mila proudly displays her figure on the table. Daemon starts laughing, points to the horse and jokingly asks "What is that? It's got wings." Mila then explained how the horse on wheels symbolised Blueberry constantly going round in circles, even though the horse had the capacity to progress into the long run, as expressed by the horse having wings. Daemon was seen nodding eagerly in agreement with Mila's narrative and this generated a lot of positive energy, which sparked new ideas. It was noticeable that Mila became more vocal with her thoughts, as ideas were discussed and signs of division between Daemon and Mila begin to fade, at least for a while. Later on in the workshop, Daemon then brings the horse on wheels back into their construction and playfully animates the horse and keenly slides the horse along the table, moving it around in circles. His mirroring of Mila's ideas appeared to illustrate his support and acceptance of the views of his core team. (Field diary)

In the vignette in Box 13, Daemon is seen being inquisitive about the constructions made by Mila. This inquisition prompts Mila to reveal her opinions, which Daemon is seen clearly agreeing with. Participants also displayed signs of fun and enjoyment, as Daemon was seen laughing at Mila's unique construction of a horse on wheels with wings. Playful interactions that occurred as a result of material engagement thus sparked conversation and dialogue between participants and generated new ideas to emerge. The subsequent narrative to these metaphorical constructions also provided an opportunity for employees to share their opinions (Roos & Victor, 2018), through a material representation. Given that ideas were represented physically and visually, and were corroborated through this narrative, managers were seen accepting these views and also mirroring them later on during the workshop.

The managing director at Rubix also displayed similar signs of enquiring about the meaning of different aspects of the material constructions that were created by the wider team. Consider the vignette in Box 14. During the pre-observation phase, Kylo was seen sweeping over the comments made by his team and he typically failed to address these comments directly. By contrast, during the workshop, the practice of playing with the materials and the final material constructions that arose from playful interaction prompted interest and inquisition from Kylo, who enquired further about these constructions.

BOX 14 – PLAYFULNESS INVITING INQUISITION

The Rubix team were observed quietly playing with the toys as they began to build a representation of their own interpretation of the business. Adam was seen looking for different animal figures and placing these on a Lego platform. Jane began stacking different coloured Lego bricks and Kylo began rolling out pieces of Play Doh into a long string. When the facilitator asked the participants to share their ideas, the team went round individually explaining their metaphorical constructions. As each team member explained their construction, Kylo raised questions, keen to know more about the ideas being the material representation. When Tam explained that his construction showed the merging of two worlds where Rubix was on one side and the customer was on the other, Rubix was trying to escape the current world and to better themselves. Kylo enquired as to "Why is the initial world difficult?" to which Tam responds that it is "how it was created." Kylo continued to enquire about each of the constructions made by the team and was seen nodding and listening intently to the narratives. (Field diary)

Box 14 draws attention to the capacity of play to invite discussion among organisational actors, especially from managers, who were observed typically lacking consideration of the views of the wider team. As depicted in the vignette above, Kylo was seen actively engaging in dialoguing (Gegenhuber & Dobusch, 2017) and asking further questions to employees regarding their constructions and opinions. This is significant because Box 14 illustrates the capacity of play to serve as a means to generate new discussion, in particular, from managers who seek to uncover further details and opinions from non-managerial employees. Furthermore, Kylo appeared to be asking questions out of genuine curiosity and showed signs of agreement by nodding as employees explained further. This is reflected in Adam's post-workshop interview, where he explains how the metaphorical constructions enabled actors to have power over their opinions, which were not so easily disregarded by other organisational actors, and managers in particular, as reflected in his quote below:

> "With this idea of creating a piece of art and then other people speaking about it. You give your own interpretation. Somebody says 'oh, this is how I interpreted it' and then, you know, the power of ideas. You put one idea with another idea, and you build on it. It's good for that, where it comes to setting strategy… it's good for creating a narrative and creating a story, which gives us [the creator] power and influence to the idea". [Adam]

From his interview, Adam revealed that by building a construction, this gave power to whoever created the construction and encouraged conversation and debate as the metaphorical construction became a point of reference. In other words, actors would not be in the position to discredit the interpretation of the construction that was created by another member of their organisation. Rather, actors would ask questions and ask for clarity about the construction in question, which in turn sparked different insights and collaboration. This prompted members to share their thoughts on the construction, which contributed to the development of strategic direction through collective means that were shaped by the interpretations and understanding of the wider team, rather than strategy solely being shaped by top-level managers.

To summarise, the process of playing with materials and the final physical and metaphorical constructions that arose from playful material interaction was largely significant for the empowerment of non-managerial employees. Given that actors had ownership of their own physical constructions, their opinion and associated narrative were not so easily dismissed by managers. In fact, managers showed signs of curiosity as they enquired and asked questions relating to the meaning of the physical constructions made by the team. Managers were also seen to show support and agreement with the ideas of their team, which in turn provided employees with confidence to be more vocal in the sharing of their ideas during the workshop.

5.3.3 Developing team spirit

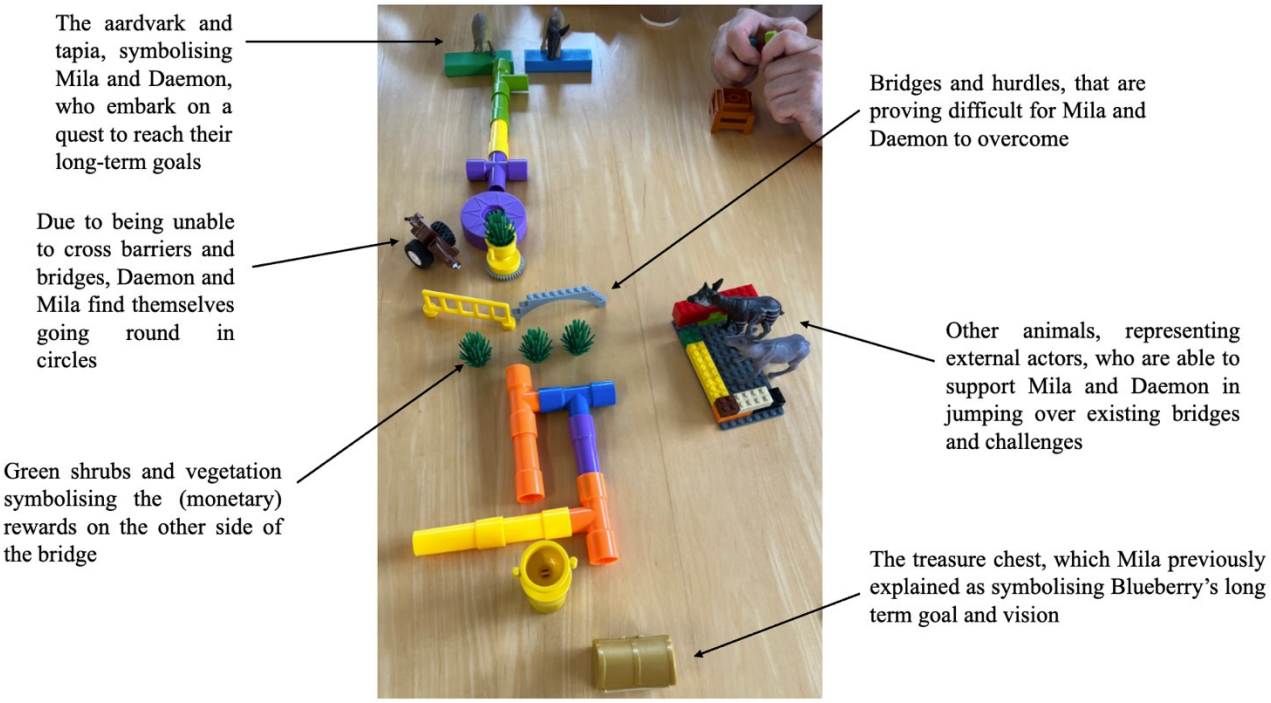
The final theme that occurred across the workshops, which was necessary for creating a playing field that could enable the flattening of hierarchical structure, was the development of team spirit and building a collective construction that fostered a shared understanding between organisational members. Developing a team spirit and feeling of ‘community’ among the participants was an important pillar to foster flattening of the hierarchy, to help reach sentiments of belonging and commitment (Hautz et al., 2017) to the crafting of organisational ideas. Consider the vignette in Box 15. During their workshop, Mila and Daemon were observed collectively creating and bouncing ideas off each other, drawing on materials for inspiration. This was in stark contrast to the pre-observation phase, where Mila generally remained responsive to Daemon’s instructions, as it was the CEO who was leading the discussion. By contrast, the video-recorded workshops revealed a contrasting dynamic and greater evidence of team spirit.

BOX 15 – COLLECTIVELY CRAFTING A ROADMAP

Mila appeared quite interested with the materials as she was smiling while searching through the boxes of toys. She took her time, deciding which materials to take out of the box and bring to the centre of the table to form part of the collective physical construction. Daemon appeared less engaged with the materials and often watched Mila's playful engagement with the toys. It seemed Mila's interaction with the toys encouraged Daemon to do the same, who began to assign meanings to the materials Mila brought to the centre of the table. Daemon explains how "[Mila] said at the beginning, in terms of rather than thinking about opportunities [Daemon grabs the chest Mila had used earlier], long term and whatever, we just need to focus on this bit here [Daemon points to the pipe after the hurdle]." Mila nods in agreement and later comments that "We get to this point [Mila points to the bridge in their construction] and just end up going back [to the start]." Daemon echoes Mila's narrative and emphasises how they are both "stuck here" at the front half of their construction. (Field diary)

Box 15 illustrates the different role actors take when engaging in play. For example, Mila was seen being more physically engaged with the materials, as she actively searched for the toys and freely moved the toys in her hand and across the table. Daemon appeared to be less physically engaged but instead, he would assign meaning to these materials based on his and Mila's previous ideas. By re-using Mila's previous ideas, such as Mila's view that Blueberry should focus less on opportunities and the long term of the business, and more on how to overcome their current barriers. Re-using Mila's symbol of the treasure chest signifying Blueberry's long-term goal (Figure 5.1), thus created a deeper level of commitment between the two actors and the mutual recognition that Blueberry's focus needed to be directed towards overcome present hurdles (symbolised by the bridge). Daemon re-emphasising Mila's previous ideas was vital in creating a sense of commitment between him and Mila and that her views were significant in crafting Blueberry's road map (Figure 5.1).

Figure 5.1: Blueberry's material road map explained



Another scene from the video recorded workshops for the Capricorn team, illustrated how playful interactions with materials and different actors bringing various toys to the centre of the table, prompted a humorous exchange that revealed shared sentiments and ideas. Consider the vignette in Box 16. Zena, Lois and Claire were discussing the organisational culture at Capricorn. The vignette depicts how materials can serve as a prompt to engage in conversation and for shared ideas to surface.

BOX 16 – CREATING A SHARED UNDERSTANDING

Lois was seen positioning various different animal figures in the centre of the table. She looked happy and relaxed as she was doing so, turning the animals in different angles and she moved them around, so that there was space between the animals. Claire, who had been watching Lois, points to a kola and deer (who are positioned very close to the elephant), and asks Lois "Is that me and [Liz]?" Lois laughs and then picks up the koala and deer, and she begins to act out a role-playing scene, putting on sarcastic voices and she pretends the koala and deer are speaking and complaining of a lack of contribution from the other animals. Claire chuckles in response to Lois' animation but then her laughter fades and she looks down at the animals on the table, almost a little sad. Claire then asks "But then what does this say about [our] culture?" (Field diary)

The vignette in Box 16 underlines the capacity of play in helping organisational actors develop a shared understanding. Claire asking Lois whether the koala and deer represented her and Liz showed her viewpoint that she and Liz were more committed to Capricorn as a business, compared to other employees. This is also symbolised in Lois purposefully positioning certain animals closer to the elephants (symbolising her and Zena). Lois' subsequent role play signifies her agreement with Claire's viewpoint and that her humorous acting of the koala and deer complaining, implicitly displays her recognition that Claire and Liz may feel some dissatisfaction that other employees may not contribute to the business as equally. Claire's concluding question asking Lois about their culture, prompts subsequent debate surrounding how the culture at Capricorn is not equal for its employees. Ultimately, the scene depicted in Box 16 showcases the mutual understanding that is achieved through play and that managers and employees share similar sentiments of unequal commitment and contribution from Capricorn's employees. Having shared viewpoints thus facilitates generative strategising to tackle the challenges of different commitment levels among Capricorn's team. The significance of play in supporting the discussion, is reflected in Claire quote below.

> "In a way that was a bit lighter than usual, because the play I think made it a bit lighter". [Claire]

Claire's reflection from her post-workshop interview spotlights the role of play and helping to create a "lighter" mood to discuss potentially more sensitive topics, like the unequal commitment from employees, through play. This is reflected in Lois' role play with the animal figures, which Claire appeared to find amusing, which also highlighted how her viewpoint of uneven commitment was also recognised by the co-founder. Playfulness served as a mechanism to enable organisational actors to raise topics of concern that managers also shared the same viewpoint on.

5.3.4 Summary

In summary, this section highlighted the necessary pre-conditions to create an environment that can enable power dynamics to be levelled out. This coincides with Ocasio, Rhee and Boynton's (2019) statement that playfulness needs a playground. In other words, the space organisational members find themselves in needs to be equipped with the pre-conditions to allow hierarchical norms to be temporarily suspended, within these spaces. The video-recorded data illuminated three pre-conditions to create a playing field, that would foster the

diffusion of hierarchical norms. First, having a new physical environment was important and for organisational actors to be taken out of their day-to-day working spaces. Taking participants out of the usual working spaces also took participants out of normal working structures and existing hierarchies that supported the feeling of 'not-at-work' mindsets. Second, organisational employees need to feel empowered and this was achieved through actors self-building constructions. As these actors were the creators of their own construction, only they knew the true meaning behind the materials and so their viewpoints were substantiated by material representations, with less scope to be discredited. Third, through playful encounters there was a development of team spirit, where managers and employees shared mutual sentiments on working practices in need of change. Altogether, these conditions created a playing field that would enable prevailing power dynamics to be suspended for a transient time, in the context of the strategy workshops. The next section will move onto the process of how these hierarchical norms are temporarily suspended.

5.4 Levelling the playing field

Thus far, this chapter has illustrated the prevalence of hierarchical norms that bound employees to largely remain silent and accepting as managers outline to them organisational strategy. The direction of organisational strategy is defined by managers, CEOs and founders of businesses, who are considered as the elites of strategy (Whittington et al., 2011) that reside at the top of the hierarchical ladder. In line with prevailing norms, employees lower down the ladder are seldom involved in the crafting of strategy. Bringing playfulness into strategy workshops, as we have seen in the former section, has begun to create an enabling space for these hierarchical norms and power dynamics to be temporarily suspended. The purpose of temporary suspension is for hierarchical forces to be momentarily flattened, so that employees may voice, contribute and participate in strategy making, collectively with managers. As revealed in the post-observation phase, organisational actors returned to their 'normal' working patterns and so the hierarchy resumed after the workshop had finished. The purpose of bringing play into strategy work was not to dismantle existing hierarchies, but rather, to explore how play supported wider participation in strategy from the temporary suspension of these structures and the subsequent influence on organisations as a result of this suspension. As showcased in section 5.2 of this chapter, during 'normal' workplace meetings, managers failed to demonstrate signs of encouragement, acceptance or invitation for employees to participate in strategy. Through playfulness, the dynamic between managers and employees shifts as play creates the conditions that draw out acceptance from managers

and also confidence from employees. This chapter will therefore delineate the process of how through practicing play and foolishness, the playing field is levelled as hierarchical norms are suspended.

By zooming in on the video-recorded data and analysing the micro-interactions between organisational actors and how foolish, playful and even purposeless action can tease out a new presentation of self (Goffman, 1956), actors displayed behaviour that diverged from the hierarchical boundaries that were shown to previously exclude employees from strategy. First, playfulness and the materials empower employees and gives them the confidence to voice their ideas. Given these ideas stem from material constructions, managers demonstrate acceptance of these viewpoints and build off the narratives told by employees. This is the phase of *reinforcing* through shifting mindsets, where organisational actors would display signs of support and agreement towards different contributions. Second, as employees gained confidence from having their ideas reinforced by managers, employees started to reveal more critical insights and even personal grievances. At this point, previous hierarchical structures had begun to fade, as employees showed signs of directing the progression of strategic discussion, which showcased a *flattening of the hierarchy*. Third, the contributions of employees were embedded in action plans, summarised by managers. Playfulness was thus vital in creating a shared commitment among organisational actors, where managers not only heard but *legitimately considered* the ideas of employees, which were embedded in strategic outcomes. A summary of this process is shown in Table 5.1.

Table 5.1: Summary of the process of levelling the playing field

Concept	Definition	Empirical data illustration	Key theoretical insight
Reinforcing	Occurred where organisational actors playfully interacted with materials and assigned meanings to these materials. Later, managers would use the same materials and re-emphasise ideas and/or comments made by employees previously.	While Lois is sharing her ideas, she notices Claire's material construction that had been raised earlier in the workshop. Lois points to Claire's construction and echoes Claire's idea, reinforcing them.	Due to playful interaction with materials, organisational actors displayed signs of increased confidence to share ideas and opinions. These were later reinforced by managers, which continued to provide confidence to employees who used play to generate further insights in strategy making.
Flattening	Occurred where organisational employees became more confident and directed the progression of strategic debate. In contrast, managers became less commanding and followed the progression being defined by employees and their playful constructions.	Mila displayed signs of confidence and capability as she swiftly constructed a material landscape with the materials. Daemon was watching and asked for clarification regarding the meaning behind particular objects within the material landscape.	Continued playful interaction promoted greater confidence among organisational employees, which prompted them to direct the progression of the strategy workshop, focusing on topics that emerged as a result of material interaction.
Considering	Occurred where organisational managers displayed signs of resuming their positions in hierarchy and made summative comments, which encapsulated the ideas previously presented by employees.	Kylo presents a visual representation of a 'work block' system for the Rubix team in order to overcome challenges relating to tasks being incomplete, which had been raised previously in the workshop.	Given managers resume their hierarchical position during the strategy workshop, the suspending of power dynamics is only for a transient time. Normal power dynamics resume upon conclusion of the workshop.

5.4.1 Reinforcing

The first phase of reinforcing occurred where organisational actors were observed freely interacting with the materials. Actors would search through the different toys available and then pick out toys they wished to use and brought these toys to the centre of the table, in full view of the entire team. Meanings were then assigned to these objects, which served as pivots, that facilitated discussion between actors (Vygotsky, 1933) and subsequent strategic action. Given that pivots serve as symbols, with each user having a different meaning (Henricks, 2018), playfulness and the materials of play thus invited discussion between managers and non-managers. In particular, managers would ask questions to employees about the meaning of their construction, which sparked the realisation of new insights. Consider the vignette in Box 17.

BOX 17 – ADAM'S BEAVER INVITING QUESTIONS

Adam was observed intently focusing on the toys in front of him as he searched through the box of toys with his hands. He found a green Lego platform and placed this in front of him. He paused and then continued to look for toys in the boxes and then he pulled out another grey Lego platform. Adam remained silent as he appeared engrossed in building his construction, piecing together different coloured Lego bricks and placing some animal figures on top of the Lego platform. Adam only stopped modifying his construction when the facilitator asked Adam to explain his idea. He quietly explained that his material landscape is "a representation of a semi-useless creature [a platypus] with potential who lives in this grey area [points to the grey Lego platform]. We [Rubix] are the bridge to where the grass is greener. This is a beaver who represents [Rubix] as beavers are builders with massive potential and creativity." Kylo, who was looking intently at Adam's construction then asked, "Is the bridge already there?" to which Adam confidently and firmly responds by saying "No, we build the bridge. We're the beaver so we build the bridge." Kylo continues to enquire further and asks questions regarding the role of the platypus to which Adam confidently responds with his interpretations. (Field diary)

Box 17 depicts how as the creator of his construction, only Adam knew the meaning behind the intricacies of his material landscape. Kylo, recognising that he would have a different understanding of the materials compared to Adam, sought clarification behind the meaning of different material components (e.g. the beaver and the Lego bridge). Kylo was observed regularly asking questions to employees surrounding their constructions and their associated meanings imposed upon by their creators (Göncü & Gaskins, 2010; Henricks, 2018). The toys

used as part of play proved to be vital for meanings and ideas to be created as these constructions invited curiosity and questioning from other organisational actors and managers in particular. After Kylo had satisfied his curiosity of the constructions created by his team, he underpinned these narratives by offering a verbal reflection, as seen in his quote below.

> "I think that's a good representation [points to Adam's construction] of what we do. The practicality [of it]." [Kylo]

Kylo commenting that Adam's material construction and his meaning behind it served as a "good representation" of Rubix is particularly significant. By reinforcing Adam's ideas, this prompts further discussion to take place as Adam holds the information and meaning behind his material construction. As studies have shown, we have already seen how employees may fail to participate in strategy due to information asymmetry (Stjerne et al., 2024). Playful interaction with materials affords actors with associated meanings and symbols (Piaget, 1945), only truly understood by their creator. As illustrated in Box 16, as the creator of his landscape, Adam had a complete understanding of his construction and Kylo, recognising this, enquired further to seek clarification from Adam. This interaction begins to show signs of Kylo acknowledging the views of the wider team and accepting these ideas. Hence, this indicates how playfulness can facilitate shifting mind-sets (Heracleous & Jacobs, 2008), where Adam displayed signs of confidence as he shared his viewpoints and Kylo showed signs of reinforcement and acceptance, which was in stark contrast to the interactions during the pre-phase of data collection as delineated in section 5.2 of this chapter.

The act of managers seeking clarification from employees was evidenced during the workshop for Rubix, which resulted in Kylo sharing his personal reflections and reinforcing Adam's ideas that stemmed from his construction. For the Capricorn team, reinforcement manifested through physical gestures where Zena and Lois would corroborate Claire's ideas by pointing towards her material construction. Consider the vignette in Box 18.

BOX 18 – SHARED MEANING STEMMING FROM LEGO CHARACTERS

Claire is seen keenly searching through the materials and is quick to bring out toys from the boxes as she places these objects neatly in front of her. Claire appeared to be carefully deciding which toys to have in front of her. She made a few changes and swapped out the materials in front of her, for toys in the box. She eventually settled for a tiger, a treasure chest, some Lego bricks and a Lego character. When the facilitator asked Claire to share her thoughts, she explained the meaning behind her choice of toys and cautiously explained how her Lego character represents "the people in this room and probably [Liz] as well" who are central to the organisation and provide the business with the strength to grow. Later, when Lois shares her viewpoints, she references Claire's material landscape and points to the Lego figure Claire had used and echoes Claire's viewpoint that the people in the room are central to Capricorn but that this is also a problem for Capricorn's future. (Field diary)

Box 18 illustrates how material objects act as a visible and tangible point of reference, where ideas presented by employees have greater prominence due to the physical preference of materials. The materialisation of viewpoints gives physical presence to ideas, which enables them to remain present and in the minds of organisational actors. As evidenced in Box 18 where Lois, seeing Claire's Lego figure, references Claire's viewpoint of the importance of people to Capricorn and ultimately, her shared view that the individuals working at Capricorn are vital for Capricorn's survival. Lois' mirroring of Claire's narrative thus reinforces Claire's viewpoint and shows signs of encouragement from the co-founder at Capricorn, that stemmed from bringing immaterial ideas to physical form through playful interaction. Later on in the workshop, when Zena began to reflect on her findings, noticing Claire's landscape was still intact on the table, she also referenced Claire's viewpoint and underlined the importance of Capricorn having the right people.

> "All of this is really helpful, because we don't often have this space to chat, to articulate… I really like what you mentioned about this [points to Claire's material landscape] but also kind of how it spills into, we can't keep functioning like this as a team." [Zena]

The video-recorded data highlighted how managers (e.g. Zena, Lois and Kylo) demonstrated signs of acceptance and encouragement of the ideas shared by employees. This acceptance stemmed from employees sharing their viewpoints through playful interaction with toys in order

to create a material landscape. The physical representation of ideas proved to be vital, as it was the material constructions that served as a lasting point of reference, which enabled ideas to sustain and be re-emphasised at a later point during the workshop. In normal meeting settings, as illustrated in section 5.2 of this chapter, managers were not observed demonstrating the same signs of acceptance towards employee ideas. Playfulness thus prompted actors to physically show their ideas, that empowered employees and draws out notions of reinforcement from managers.

5.4.2 Flattening

The previous section delineated how playfulness and sharing ideas through material representations empowered the creators of these landscapes, as their ideas were given physical form and the meaning behind the material landscapes was reinforced by managers. Hierarchical structures were thus beginning to dissolve, where managers displayed signs of reinforcement and acceptance of the ideas of employees, that would ordinarily be disregarded. As organisational actors continued to engage in playful behaviour and interacted with the materials, prevailing hierarchical structures flattened as managers became less authoritative and employees became more commanding of the direction of strategic debate. This was evidenced where employees took the lead on sharing their narratives, stemming from a playful interaction with toys. Employees were also observed raising their personal grievances, which were acknowledged by managers. This enabled organisational actors to walk on thin ice and discuss topics that would ordinarily be avoided during strategy meetings.

A display of what flattening the hierarchy looks like in practice can be evidenced in the vignette in Box 19. During the strategy workshop, Claire appeared confident as she positioned different materials together to create a material landscape that depicted the challenges of their working culture. On the other hand, Capricorn's co-founders were observed seeking clarification from Claire as she assumed the authoritative position while they were playing with the toys.

BOX 19 – CLAIRE LEADING THE CONSTRUCTION

Claire, Zena and Lois were seen engaging in playful banter with each other and commenting on the appearance of different animals and joking about how they looked. The energy and mood of the room felt light-hearted and relaxed. Claire was observed placing a squirrel on top of a moving Lego platform and then turned an okapi figure on its side so that it wasn't facing straight ahead. Claire then searches through the boxes and brings out a bridge and says, "This could be another connected bit" and then Zena asks "What are you trying to say?" to which Claire affirms her position that "This to me is like aspirational. You know, like this is what I think we are, but maybe it's not what people feel we are." Lois is seen looking at Claire and the animal figures in front of her and responds with a firm "Yes." (Field diary)

The playful encounter with the materials illustrated in Box 19 shows how Claire was taking the initiative with regards to the positioning of the animals in the material landscape. Claire later explained how the squirrel symbolised her own position in the business and how she feels she "doesn't quite fit into the role" because of the additional tasks she undertakes, due to her commitment to the business, which Claire believes other employees wouldn't do. The vignette in Box 19 also depicts the co-founders seeking clarification from Claire and agreeing with her the meaning she associates to the toys used as part of play. For example, Claire explains the aspirational meaning behind the bridge and the associated challenges of this aspiration not being recognised across Capricorn. The process of Claire choosing materials to bring to the centre of the table and then positioning them is significant in terms of empowerment as this provided her with the tools to lead the direction of strategic debate, evidenced by Zena seeking clarification from Claire regarding the meaning behind the toys. Claire continues to direct the progression of the workshop as she goes onto discuss her expectations of the co-founders, as reflected in her quote below.

> "Expectations can't extend to people in the way that it has for us and I think it has to change for us, in order for it to change the organisation organizationally… I need to be able to rely on directors to make strategic decisions or to make leadership decisions." [Claire]

Claire's affirmative quote shows her expectations (as an employee) of the co-founders of Capricorn, which is opposed to traditional working practices, where managers tend to set out their expectations of employees. While she was speaking, Claire appeared confident and

affirmative in her position that she expects the co-founders to make strategic decisions. This is currently not the case as Zena and Lois had previously expressed their discontent with being involved in the day-to-day running of the business. Zena and Lois extend Claire's narrative of expectations as Lois explains she and Zena are "still trying to build the bridge" to enable Capricorn to reach a position where the entire team, including the co-founders, have clear boundaries and expectations. Claire's confidence to speak-up and voice her expectations that stemmed from her own symbolic interpretation of materials that allowed her to bring more sensitive topics into strategic debate and thus, walk on thin ice, that was facilitated by play and the self-imposed meanings of materials (Göncü & Gaskins, 2010).

The video-recorded workshop for Blueberry also showed signs of employees leading the direction of strategic debate and voicing their concerns to managers. As revealed in section 5.2 of this chapter, during the pre-observation phase, Daemon maintained a directive position as CEO of Blueberry and utilised meetings to gain updates from the team regarding incoming projects. Daemon seldom invited Mila or Oli to share their personal viewpoints on the progression of the business. Consider the vignette in Box 20. This vignette illustrates a role reversal between Mila and Daemon, where Mila is crafting out their material landscape and directing the progression of debate.

BOX 20 – MILA'S SPEEDY CONSTRUCTION

Mila and Daemon progressed onto exploring how Blueberry could achieve its long-term goals. Milla seemed fully absorbed and in the zone of play as she enthusiastically searched through different boxes of toys to bring various materials into her landscape. She placed different coloured connecting tubes and building blocks onto the table and laid them out. It looked a bit like an assault course. By contrast, Daemon appeared less enthusiastic and at times, he seemed keen to simply watch Mila craft out the material landscape. At times, Mila paused from crafting her masterpiece and volunteered her thoughts and explained "So this central bit is going to feed into some of the things that we have to offer" to which Daemon seeks further clarification and asks Mila where in the business they will be feeding into. Mila decisively responds by saying Blueberry should support their community. (Field diary)

Box 20 illustrates a different version of Mila, who in the pre-phase of data collection, appeared generally quite reserved. By contrast, during the strategy workshops, Mila seemed absorbed in the activity as she casually rolled Lego vehicles in her hand and was eager to search through

the boxes of toys. This in turn, prompted Daemon to seek clarification from Mila and ask her questions regarding the meaning behind the toys in their landscape. Mila immediately responds by saying Blueberry exist to serve its community of entrepreneurs. She then unravels her personal viewpoints on how she feels this is no longer the case, as seen in her exchange with Daemon below.

> "This is what confuses me. Like who is this [the community]? When I first started, they were entrepreneurs... It's not so much that now." [Mila]
> "But it still should be… We're here to help." [Daemon]

Box 20 also shows Mila openly expressing her concern that Blueberry is no longer aligned with its goal of supporting entrepreneurs. Daemon is also in agreement with Mila's sentiment and that Blueberry "should" exist to help entrepreneurs grow and develop. The self-imposed meanings on objects proved to be vital in bringing the topic of Blueberry's community to surface. Mila's visible certainty and passion while playing with toys prompted Daemon to seek clarification from her, which enabled Mila to shape the direction of strategic debate towards Blueberry's lack of commitment towards their community of entrepreneurs. In her post-workshop interview, Mila shared how she found the distraction of play enabled her to think through ideas during the workshop.

> "Just like distracting yourself by doing things [with toys], is a really nice way to think through things… I like the distraction of that 'doing' so that your brain can think without being like pressured… okay let's build this and see what comes out." [Mila]

Mila's reflections show the significance of play in enabling organisational actors to do things for no immediate purpose (March, 1971) and to just "see what comes out." Hence, Mila may not have been thinking of Blueberry's community of entrepreneurs while she was engrossed in play. Her interaction with the toys perhaps served as a "distraction" and that she was simply enjoying the activity. Later, "what [came] out" of this playful encounter was the solidification of her view that Blueberry no longer serve its community and playing provided her with the means to bring this directly to the attention of the CEO, who also agreed that Blueberry "should" continue to support its entrepreneurial community.

To summarise, when engaging in play and freely interacting with the toys to build a material landscape, organisational actors assigned their own meanings to these objects. Hence, managers would seek clarification from employees, who offered their viewpoints, which were supported by material objects. For example, Claire used a Lego bridge to symbolise a lack of

expectations and then proceeded to define her expectations of the co-founders. Mila used her material landscape to explain how Blueberry was no longer aligned with its commitment to supporting entrepreneurs. Both Claire and Mila displayed signs of confidence and authority when revealing their viewpoints, which were later emphasised by managers. The physical representation of employee ideas through materials was vital in managers consolidating these ideas, given that the material representation remained visible and served as a point of reference and a reminder of employee viewpoints. This is evidenced in Tam's reflection below.

> "I think even something as simple as turning this [Lego object] over is very beneficial for me to remember… I like looking at other people's designs." [Tam]

Tam's quote underlines how materials can support immaterial ideas being remembered by organisational actors and having these ideas sustain throughout the workshop. His quote also draws attention how play affords actors the ability to physically see the ideas of others, which helps to foster a shared understanding among organisational members. The combination of increased employee confidence supported by material representation, which led to employees directing the progression of strategic debate and managers mirroring employee opinions. This mix also supported employees to reveal their concerns and enabled organisational actors to walk on thin ice and bring potentially contentious issues to surface in the presence of managers.

5.4.3 Considering

Thus far, this section has explained how practicing playfulness with material interaction helped to create a light-hearted and relaxed mood, which also offered a distraction from facing strategic issues head-on. Given that organisational actors were the creators of their own construction, they had a full understanding of the meaning associated with their objects and constructions arising from play. This prompted other actors, namely managers, to seek clarification and ask employees for their viewpoints that were materialised through their physical constructions. Given employee ideas had material form, this helped to substantiate their opinions and managers were more accepting and open to the viewpoints of employees. Playful interaction with the materials brought about a new presentation of self (Goffman, 1956), where employees displayed signs of authoritative direction in leading strategic debate by using the materials to prompt ideas and discussion points. Existing hierarchical structures were therefore dissolving, where employees displayed signs of guidance and direction. The viewpoints that were presented by employees were reinforced by managers, who echoed their

opinions at later points during the workshop. The video-recorded data also revealed how the views of wider employees were not only heard by managers, but also legitimately considered as part of organisational strategy, as managers showed the intention to implement changes in the wider organisation. Consider the vignette in Box 21.

BOX 21 – KYLO SUMMARISING HIS ACTION PLAN

Following on from a previous discussion surrounding the workload of employees and how there is no form of punishment in place, Kylo summarises the presented ideas from the team into a visual action plan. Kylo explains that "I think the solution is if we want this to work… you have to manage putting the block into a thing or I put that block into that week for you. One way or the other." As Kylo is explaining, he simultaneously picks up a Lego platform and a building block and moves the building block across the Lego platform, to indicate the work blocks for team members. The team are watching Kylo closely, as he moves the different coloured building blocks across the Lego platform. Adam then questions Kylo what would happen if employees still failed to deliver because "[they] got busy." Kylo, pointing to the different coloured building blocks, explains that due to the commitment to the working blocks, employees would need to fulfil these work commitments and turn down other tasks. Kylo goes onto explain how the blocks provide "a minimum commitment" from employees. Adam sits back in his chair and nods in agreement, as he picks up one of the blocks and twists it round in his hand. (Field diary)

Box 21 illustrates how Kylo has resumed his position in hierarchical structures, as he summarises an action plan for how the Rubix team will progress in terms of their new working commitments. Drawing on the toys in front of him, Kylo explains a 'work block' system that is intended to help overcome current challenges at Rubix, relating to employees failing to deliver tasks on time. Box 21 also shows how Adam raises questions and expresses his concern that even their new working system may not be enough to ensure tasks are completed. By bringing his apprehension directly to Kylo's attention, this underlines how playfulness has been able to break down formal hierarchical structures where employees have the confidence to bring topics of concern forward during strategy meetings. However, Box 21 points towards how Kylo is directing the implementation of the new working system, which indicates the restoration of hierarchical structures towards the end of the strategy workshop where ideas are summarised.

As the workshop for Blueberry was coming to a close, Daemon was also observed resuming his position in hierarchy as signs of 'normal' power dynamics, as evidenced during the pre-phase of data collection, began to resume as the strategy workshop was close to concluding.

Consider the vignette in Box 22. Daemon was seen picking up toys in front of him as he mirrored Mila's opinion that Blueberry should realign its focus towards supporting the community of entrepreneurs. Box 22 illustrates that while playfulness and material interaction can enable hierarchical norms to be temporarily suspended within meeting spaces, these normal power dynamics resume towards the end of the strategy workshop, where managers provide their summative reflections. These concluding reflections however encapsulate the ideas presented by employees and in Box 22, Daemon emphasises Blueberry realigning with its "social mission", which was of particular importance to Mila, who raised this during the workshop.

BOX 22 – BRINGING THE FOCUS BACK TO BLUEBERRY'S COMMUNITY

Towards the end of the workshop, the facilitator asks Mila and Daemon to reflect on the workshop and the ideas they've gathered. Mila and Daemon both look towards their most recent material construction, on the table in front of them. Mila comments "I think that's the biggest thing because my area has always been like providing social value, but for people who need it most. I don't really care to help businesses who have large investments." Daemon nods in agreement and mirrors Mila's sentiment by saying Blueberry's work is "All determined by this community in the centre [points to the centre of the construction]." Daemon then picks up a green shrub from their material landscape and emphasises the importance to deliver Blueberry's "social mission", which has been pushed aside. Mila also picks up a green shrub and smiles as she fiddles with it in her hand. (Field diary)

To summarise, the phase of considering revealed how prevailing hierarchical structures resumed as managers returned to their previous norms and directed action points to be taken from the workshop. These summative points did encapsulate the ideas presented by employees and by bringing employee ideas into conclusive action points indicates how these viewpoints were not only heard during strategy meetings, but also legitimately considered with a clear intention to implement changes within organisations. This is reflected in Daemon's quote from his post-workshop interview, where he explained the value of play in realigning with Blueberry's long-term vision.

> "I think what it's done is helped to lay some foundations in terms of what we need to work on and figure out how to change while realign with that long term direction". [Daemon]

Considering ideas thus concludes the process of levelling the playing field, where managers show a commitment to realise ideas that were generated from employees leading strategic debate. While normal power dynamics resumed during this phase, managers continued to demonstrate acceptance of ideas of wider employees and a commitment to implement these ideas within their organisations.

5.4.4 Summary

Altogether, this section has delineated three phases of reinforcing, flattening and considering, which comprise a process that unpacks how hierarchical forces can be suspended during strategy workshops. The process spotlights how playfulness and purposive (Bouty et al., 2019) material interaction can temporarily suspend prevailing power dynamics (evidenced in section 5.2) to enable non-managerial employees to participate in strategy. Play proved to be a vital ingredient in enabling the discussion of more sensitive ideas, as reflected in the quotes below from Adam and Daemon's post-workshop interview.

> "I think it was quite a lot of sensitive ideas, that were raised during the workshop". [Adam]

> "For kind of more serious topics and that sort of stuff, it [play and toys] made it a bit easier to discuss". [Daemon]

The discussion of sensitive topics was made possible by organisational actors developing the confidence and feeling able to brings these topics to surface through the materials, that acted as a "distraction" to support bringing delicate matters to light. Due to this, employees felt able to raise their concerns (e.g. Claire's concern regarding working boundaries and Mila's worry of Blueberry diverging from its mission) by representing their ideas in material form. However, research on strategy workshops has generally found that ideas generated from strategy workshops rarely make their way back into organisations (MacIntosh, MacLean, & Seidl, 2010). Thus, the next section of this chapter will show, through post-workshop observations, how the shared commitment and materialisation of ideas that unfolded due to a suspension of power dynamics, helped translate contributions back into organisations.

5.5 Maintaining the playing field

The previous section unpacked how hierarchical structures came to be flattened through playful interactions during a strategy workshop. The final phase of levelling the playing field

indicated that existing power dynamics began to resume towards the end of the workshop, as managers made summative comments regarding ideas and how these would be taken forward into organisational strategy. After the workshop had taken place, I conducted post-workshop observations and interviews as part of data collection. This data was crucial in exploring how and whether the generated ideas from the workshop were communicated to wider organisational members and implemented as part of organisational strategy. Drawing on vignettes from post-observations, this section will unpack how levelling the playing field through playfulness generated a deeper commitment from organisational actors to enact ideas produced in the workshop. This section will also consider reflections from post-workshop interviews. The collected data during the post-phase revealed that while playfulness enabled hierarchical norms to be dissolved during a single strategy workshop, it was apparent that these structures resumed upon participants returning to their working practices.

5.5.1 Influence in the wider organisation

Consider the vignette in Box 23. Following their strategy workshop, Zena emailed the entire core team at Capricorn for them to come to the office to attend a team strategy meeting. A key focus of this meeting was centred on how responsibilities were to be allocated among employees and for the team to identify the different roles they play in Capricorn. Another key focus of the meeting was to focus on “future plans” and the progression of Capricorn. Box 23 depicts how Claire’s concern of a lack of boundaries, which proved to be a focal point during the workshop, was legitimately actioned and considered by Zena and Lois, who incorporated this into their subsequent strategy meeting. Box 23 also shows how Zena gave employees the freedom to identify their responsibilities themselves, rather than having their roles outlined for them by herself or Zena. Having the team perform this activity permits heightened accountability and commitment (Hautz et al., 2017), given that this is what the team have collectively agreed and decided upon, rather than Zena and Lois enforcing responsibilities upon the team. During the strategy workshop, Claire raised her concern of Capricorn having a lack of boundaries and how she felt she was carrying a greater burden, which was accepted by the co-founders. This concern was actioned in the subsequent meeting where Zena and Lois dedicated time to ensure employees recognised each other’s role and that this was made transparent throughout the wider team. The incorporation of this activity illustrates how the concerns raised during the strategy workshop were actioned and implemented within organisations.

BOX 23 – IDENTIFYING WORKING BOUNDARIES ACROSS CAPRICORN

Zena introduces the meeting by setting out that the team will first engage in a group activity, where the team will share what they think their responsibility is and what other team members view as their responsibility. Following Zena's instruction, Claire proceeds to write down her responsibilities on a flip chart. Geralt explains his role is centred on managing the administrative side of the business such as bookings and travel. Malik comments that his role is on content delivery and helping to build Capricorn's reputation, along with Claire. Zena distances herself from the team as she walks around the room, silent, and she listens to the conversations. Lois remains seated and is typing on her laptop, she seems preoccupied with another task… Zena brings the activity to a close and asks each team member to explain their role in the business. Claire starts by sharing her role, which she has summarised on a flipchart and she summarises the roles of other team members on the flipchart also. While the team are going round, Zena is seen nodding and listening intently, At times, she interjects and clarifies the roles of employees, who obediently accept. Zena summarises this part of the meeting by gesturing to the flipchart and the necessity of the team fulfilling their outlined roles. (Field diary)

The concerns raised during the strategy workshop for Blueberry also proved to have an influencing role in the wider organisation. For Blueberry, a principal concern that was brought to surface by Mila and later reinforced by Daemon, was the drifting of Blueberry away from its vision, that is to support its entrepreneurial community. Such discussions surrounding the vision and purpose of the organisation was rarely discussed during team meetings between Daemon, Mila and (Oli). However, this was a focal topic during the strategy workshop, where Mila grounded her ideas in the materials, that acted as a point of reference throughout the workshop, which Daemon also reinforced. Consider the vignette in Box 24. The post-observations revealed how Daemon deliberately included the topic of "community" into the agenda for their team meeting. Previously during the pre-observation phase, Daemon avoided discussing such topics with his core team. Hence, the CEO's decision to raise the topic of community and re-introducing social community events demonstrates the influencing role of ideas translating from the workshop into organisational practice.

BOX 24 – REVIVING BLUEBERRY'S COMMITMENT TO COMMUNITY

Mila and Daemon were sat opposite each other across a table, with their laptops open. Both were looking at the screens in front of them. As was typical of these team meetings, Daemon asked Mila for an update on her project leads and Mila replied that she was still reaching out to leads, with none of them yet being confirmed. Mila also comments how she would like to update Blueberry's website and to have a page dedicated to green skills, rather than sustainability, given that the training courses she delivers are more closely aligned with green skills. Daemon agrees but then swiftly resumes to the discussion surrounding potential incoming projects and how these can be secured. Towards the end of the meeting, Daemon looks up from his laptop and says he would like to "talk a little bit about the community side of things" and how he plans to prepare more social events to bring the sense of community. Mila also looks up from her screen and her face lights up, visibly excited about the idea of having community events. She suggests a Christmas social event, to which Daemon responds that it could be a good idea to do an event in the new year in January to celebrate Blueberry's fifth birthday, that could also coincide with a new year social. Mila expresses her keen enthusiasm as they begin to plan Blueberry's social events. (Field diary)

5.5.2 Recognising the hierarchy remains

The purpose of using play as an instrument to suspend hierarchical structures in the context of strategy workshops, was to enable prevailing power dynamics within organisations to be suspended for a transient time, so that non-managerial employees may participate in strategy. The intention was not to supplant existing hierarchical structures and thus, it was expected that organisational actors resumed their normal working dynamics after the strategy workshop. For example, as illustrated in Box 23 and 24, the managers of Capricorn and Blueberry resumed their position of authority and directed the progression of their team meetings, rather than having employees guide the direction of debate, as they had done during the strategy workshop. Employees including Claire and Mila, remained submissive as they followed the instructions of their managers. This is due to underlying factors such as information asymmetry (Stjerne et al., 2024), which may prevent the long-term contribution from employees in strategy, as Claire explained during her post-interview.

> "I don't have as much information here [about strategy] and I think that maybe speaks to kind of who's involved in these types of meetings." [Claire]

Mila also expressed similar sentiments during her post-interview, where she reflected that she liked being more involved in strategy and being able to contribute and participate, but her view was that this was not going to last. Her view of being unable to participate in strategy for the long term coincides with March's (1971) work on how sensible foolishness can suspend prevailing structures only for a transient time. In other words, Mila recognised that while she felt more able to participate in strategy during the workshop, she believed she would be unable to do so in the future and that her contribution in strategy was limited to the strategy workshop. Consider her quote below.

> "I felt a little bit more involved [in strategy], I think it's probably not going to stay that way." [Mila]

However, Blueberry's CEO shared a different sentiment to Mila, which he revealed during his post-workshop interview. Despite the post observations for Blueberry revealing Daemon resuming his directive position during the team meetings, during his post-interview, Daemon expressed his interest to include Mila in strategy meetings with the board of directors. The quote from his post-interview below draws attention to how Daemon wants to consider the input from the wider team, regardless of their "position [in hierarchy]". Thus, there was a misalignment in the participation of employees in future strategy meetings. Consider Daemon's quote below. Here, Daemon emphasises that he would like Mila to become more involved in strategy and to help shape the strategic direction of the organisation, which he believes will help create stronger commitment and "buy-in" from employees.

> "I think [Mila] will become more involved… their input is just as valid and just as equal… Having [Mila] involved in that is that I'll be expecting to have more buy in from her because it's kind of strategy that she's helped shape and I think where you've had an input where you can see that this was something that was part of my ideas as well, you're more likely to get behind it." [Daemon]

The differences of opinion shared by Daemon and Mila during their post-workshop interviews highlight the potential confusion created by levelling the playing field. Building on March's (1971) work, these hierarchical structures were intended to be only temporarily suspended within the context of the strategy workshop. Interestingly, through follow-up interviews, managers expressed their intention to continue to include wider organisational actors in strategy making. Yet, a different view was shared by employees, who didn't feel they could continue to be included in strategy beyond the workshop. This points towards how play can

support both participation and inclusion (Mack & Szulanski, 2017), as Blueberry's CEO expressed his desire to continue to include organisational employees in strategy.

5.5.3 Summary

In sum, the data set comprising a pre and post-phase enabled a long-term exploration of how hierarchical structures unfolded and changed over time. The post-phase of data collection was particularly insightful in showing how ideas generated in the workshop were translated back into organisations and disseminated to the wider team. Given the ideas from workshops were enacted, this underscores the capacity of play in reaching greater commitment from employees. Maintaining the playing field indicates how playfulness can enable greater buy-in from organisational actors, given that ideas were shared and created collectively. The material representation of ideas supported by narratives also contributed to fostering greater commitment, that helped ideas generated from the workshop translate back into organisations. While these ideas were actioned outside the strategy workshop, hierarchical structures that were levelled during the workshop, resumed upon organisational actors returning to their normal working practices within their organisational space. This adheres to what existing studies have found where managers will regain some control (Stjerne et al., 2024), after adopting inclusive practices that emerged during the workshop.

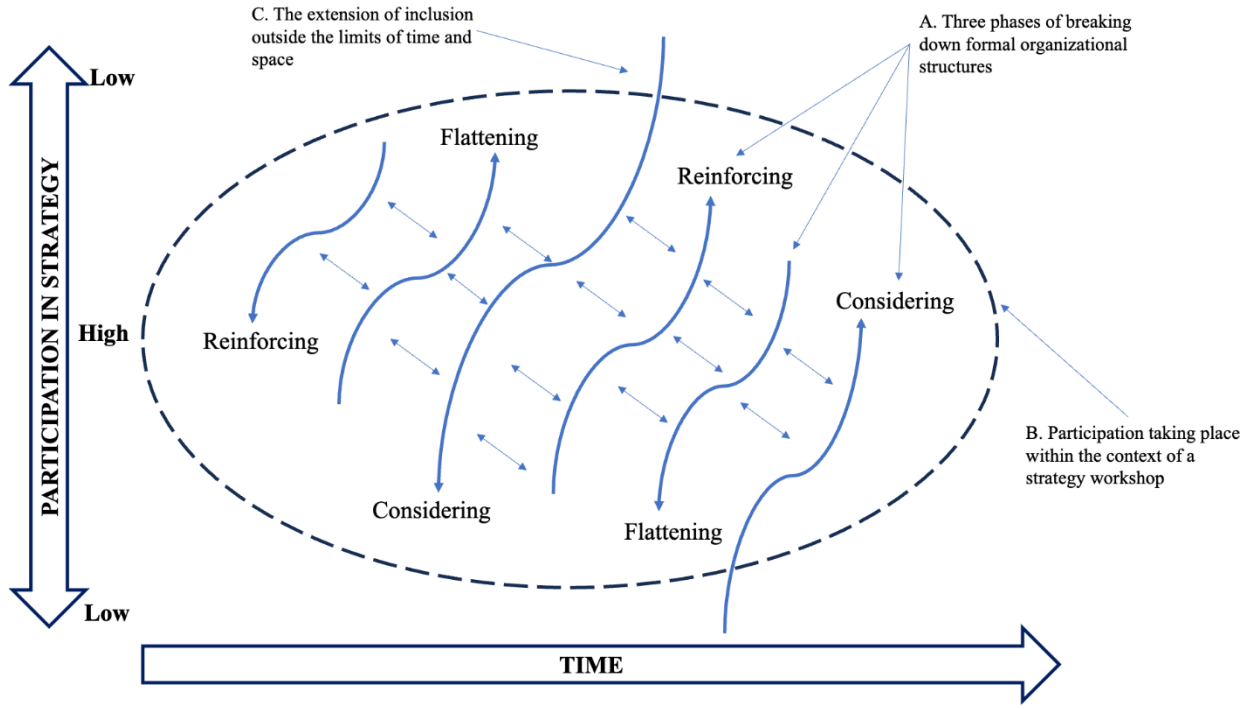
5.6 The process of temporarily suspending hierarchical norms

In March's (1971, p. 263) work, he put forward how sensible foolishness can enable organisational actors to "temporarily suspend the operation of the system of reasoned intelligence." For March, playfulness is a mechanism to realise sensible foolishness and to do things for no good reason. Previous studies have already hinted towards how play (in children) can suspend hierarchies for a given period of time (Bakhtin, 1981) where rules and structures are flexible and open to change (Parker-Rees & Willan, 2006). However, what still remained largely unexplored in these studies is the process of how formal hierarchical boundaries that could potentially hinder strategy making, could be broken down through playfulness. This resulted in the research question, which asks: How can play in strategy temporarily suspend existing power dynamics?

Drawing on interviews, observations and video and audio-recorded episodes of strategy workshops, this chapter unveiled a process of levelling the playing field. This process sheds

light on how participation in strategy can be enabled by temporarily suspending power dynamics through playfulness during a strategy workshop. Figure 1 shows how this process unfolds over time, where participation in strategy reaches a peak after cycles of reinforcement, flattening and considering. The theoretical model below points towards how the three phases can unfold concurrently and how the process does not necessarily progress linearly in consecutive stages. Figure 5.2 highlights how the process of temporarily suspending hierarchies occurs within the limits of the strategy workshop. Yet, given the legitimate consideration of managers and how contributions generated from the workshop fed into organisational strategy after the workshop had taken place, Point C of the model indicates how play enabled participation in strategy to extend beyond the scope of the strategy workshop.

Figure 5.2: A model for how play temporarily suspends hierarchical norms



The findings from this chapter offer two key contributions to the study of strategy workshops and the influencing role of play during these strategy meetings. While prior studies have examined the practices and interactions through which strategy is performed in workshops and/or episodes (Hendry & Seidl, 2003; Jarzabkowski & Seidl, 2008; Johnson et al., 2010), we still have limited understanding of how strategy workshops progress over time when practiced with play and the influencing role on power dynamics within organisations. Through

the analysis of video recorded data, the physical and tangible representation of ideas that arose through playful interaction, were reinforced throughout the workshop. By reinforcing ideas, employees demonstrated increased signs of confidence as they directed the progression of the strategy workshop, where they revealed concerns regarding organisational operations. This is where hierarchies began to flatten and managers did not display obvious signs of power or dominance and instead, direction was provided by employees. These ideas were then legitimately considered by managers, who made concluding remarks and embedded the contributions of employees within summative comments.

Second, the findings from this chapter shed light on the liminality of strategy workshops. Existing research argues that strategy workshops often function as liminal spaces, where actors are temporarily suspended from everyday routines and freed to think and interact in new ways (Johnson et al., 2010; Sturdy et al., 2006). In liminal spaces, participants are held in a transitional state, detached from their usual roles and freed from the norms and expectations that typically constrain their behaviour. This allows them to explore new ideas, identities and forms of interaction that deviate from the status quo (Howard-Grenville, Golden-Biddle, Irwin, & Mao, 2011). The findings show how the prevailing status quo with managers crafting organisational strategy was transformed to enable employees to participate, contribute and also influence strategy through playfulness during strategy workshops. While prior studies have shown how informal means such as humour, dress code and play (Sturdy et al., 2006) can help detach from operational business, these studies tend to overlook the process by which actors detach themselves from normal working practices and the process by which existing power dynamics unfold. I show how this sense of being in an extraordinary space, combined with the use of toys and playfulness, can help actors temporarily embrace foolishness to help suspend hierarchical structures.

5.7 Conclusion

In summary, this chapter has sought to explore the facilitating effect of play to generate enjoyable, instinctive and spontaneous interactions that enabled the atmosphere and ‘mood of the room’ to shift and be lifted. This new environment of strategy diverges from typical strategising environments, which I referred to as the former playing field. Through detailed vignettes, I showed how strategy was closed to organisational employees and was largely carried out by managers. Section 5.2 also emphasised how managers viewed strategy as their domain, which fell outside the remit of employees. Findings revealed that having strategy

meetings physically taking place within a new environment helped lay the foundations for organisational hierarchies to be levelled, as previous working norms were also ‘left behind’. In particular, this chapter aimed to offer two theoretical contributions.

First, the video-recorded data showed a recurrent process of how existing power dynamics were temporarily suspended through the process of levelling the playing field, which comprised three phases of reinforcing, flattening and considering. Unpacking this process is significant because from March’s (1971) work, we already know the potential of play to enable actors to suspend rational imperatives and how play can allow actors to challenge existing power dynamics (Bakhtin, 1981). What remained a blurry area is the process of how power dynamics could be suspended through play in the context of strategy workshops.

Second, this chapter highlights the role of play in supporting the creation of a transitional state of workshops, building on literature on liminality in workshops (Sturdy et al., 2006). Findings from this chapter reveal how play and purposive (Bouty et al., 2019) material interaction can foster more inclusive dynamics between employees and a different atmospheres that felt lighter and more open and inclusive. The findings from this chapter also pointed towards how play could enable the surfacing of potentially sensitive topics, which were brought to attention during the workshop. Play thus acted as a medium to enable actors to communicate through the materials to enable them to bring more contentious and critical topics to the forefront of strategy meetings. This links to the final findings chapter, which will explore how the interplay between play and reason can enable actors to visualise strategy and communicate tacitness, which are those matters that actors struggle to convey with spoken words alone.

CHAPTER 6:

SHARING TACITNESS BY FEELING AND SENSING STRATEGY

6.1 Introduction

Thus far, this thesis has unpacked the unfolding interplay between practices of sensible foolishness (play) and procedural rationality (reason) during strategy workshops. The evolving fluidity between play and reason supported generative strategising, where organisational actors engaged playfully with toys, which led to the emergence of unintended process affordances (Burke & Wolf, 2021; Gibson, 1977). Through the oscillation between play and reason, organisational employees displayed signs of increasing confidence and comfort, as they used the toys to create physical constructions to represent their ideas. These visible and tangible representations were later reinforced by managers, who were observed seeking clarification and asking employees questions regarding their material landscape. Through playful interactions, existing hierarchical norms began to dissolve as employees demonstrated a confidence to direct the progression of strategic debate and managers followed employee initiatives. These role-reversals (Bakhtin, 1981) point towards the capacity of playfulness in overcoming existing power dynamics and bringing organisational actors to the same hierarchical level in the context of strategy workshops. As actors used materials to communicate ideas, the video-recordings also showed that organisational members would use the visual and physical constructions to convey particular topics. Participants revealed during their post-workshop interviews, that they previously felt it difficult to communicate such topics with spoken words alone (Bell & Davison, 2013).

This final findings chapter will unpack how visuality in strategy making, such as presenting ideas through physical objects and material landscapes, can support organisational actors in creating meaning, support generative strategising (Knight et al., 2018) and sharing tacitness. Visuality in strategy refers to what actors display, see and create (Meyer, Höllerer, Jancsary, & van Leeuwen, 2013) using different materials (Dameron et al., 2015). In particular, this chapter will focus on physical visuality, that is tangible visuals created through physical and metaphorical constructions (e.g. Heracleous & Jacobs, 2008). Existing studies have found how visual elements in PowerPoint slides can support strategy meaning-making (Knight et al., 2018) and how crafting embodied metaphors with toys can help managers envision new forms

of strategising (Heracleous & Jacobs, 2008). Despite this, research considering visuality in strategy tends to focus on what actors say (Balogun et al., 2014; Hendry, 2000).

Hence, the findings from this chapter, I will argue, aim to extend our understanding of visuality in strategy by providing insight into a mechanism for how visualising strategy can be enabled through play to support the sharing of tacitness. This is because a challenge for organisational actors is that strategy is not always conveyed through spoken words alone. Strategy may also become unspeakable especially when there are tensions, conflicts and when organisational members wish to raise personal concerns. Hence, it is important to consider the tacit dimensions of strategy, which tend to be overlooked as research continues to focus on the discursive aspects of strategy (Balogun, Best, & Lê, 2015; Jarzabkowski et al., 2022; Langenmayr et al., 2024) and what actors say (Seidl & Whittington, 2014). Therefore, I argue there is a need to consider the unspoken aspects of strategy that organisational actors struggle to communicate with spoken or written words. This therefore relies on the tacit dimension of strategy and the role of non-discursive means of communication.

The concept of tacit knowledge (Nonaka, 1991; Polanyi, 1958) has been defined as "knowledge that individuals draw upon in action but is difficult to have consciousness of or express in language" (Hadjimichael, Ribeiro, & Tsoukas, 2024, p. 546). The sharing and communication of ideas during the strategy workshops did not always relate to knowledge but encompassed a wider range of topics, feelings and sentiments, which were not always strategic. Hence, I refer to tacitness as any topic of focus (not specific to knowledge) that is difficult for human beings to express and convey (Martin & Salomon, 2003) using spoken or written discourse alone. The final research question in this thesis thus asks: How can visualising strategy through play support the sharing of tacitness in strategy workshops?

To address the above research question, this chapter unpacks the mechanism of how playfulness in strategy can create visual representations of ideas and meanings that organisational actors find difficulty in conveying with words alone. Through the video-recorded data, this chapter zooms in on the non-verbal means of communication, where ideas are presented through the body and materialisation of ideas. The role of the body in communicating strategy draws upon Polanyi's concept of (1962) of indwelling, which refers to individuals who gain "understanding by doing" (Jha, 2002, p. 72). Research on indwelling tells us that the repeated use of materials result in those materials becoming part of the bodies of human beings (Polanyi, 1969), like how pianists draw upon their knowledge when playing

piano in concert (Pyrko et al., 2017) and how their knowledge of the notes, dynamics and tempo is translated through their body and fingertips onto the keys of the piano. This chapter builds on the concept of indwelling and extends this into playfulness in strategy and how repeated physical interaction with toys can support meaning-making in strategy (Knight et al., 2018) through tangible and physical visual representations.

This chapter provides a detailed discussion for how tactiness can be shared and communicated during strategy making and the mechanism for how this process unfolds through visualisation. To address the proposed research question, this chapter will be split into three sections. First, drawing on the video-recorded data, this chapter will illustrate (through vignettes) how indwelling and playfulness can enable actors to literally feel and sense their way through strategy. This section will underline the significance of how playful interaction with materials can enable these materials to become extensions of the bodies of actors (Polanyi, 1969) to support their sharing of ideas. The second section will delineate the mechanism for sharing tacitness, which comprises three phases of diverging of ideas, bracketing focal topics and resolving ambiguity. The third section will explain how the findings from this chapter advance our existing understanding of visuals in strategy by showing how playfulness presents fertile ground for organisational actors to uncover those potentially sensitive, contentions and even thorny topics (Knight et al., 2018) that would have been challenging to address using discourse alone.

6.2 Feeling and sensing strategy

It has long been recognised that knowledge and especially personal knowledge can be difficult for an individual to share with others. For Polanyi, all knowledge encompasses an element of tacitness, which people may struggle to easily communicate (Pyrko et al., 2017). Polanyi's concept of indwelling has significant emphasis on the body and using the body as a means to acquire knowledge and understanding. The video-recorded data provided a prime opportunity to capture how the body was involved in acquiring knowledge, sharing understanding and communicating sensitive topics that actors struggled to convey with spoken words alone. This form of video ethnography enabled a fine-grained exploration of how organisational actors relied on materials to help convey meanings, ideas and sensitive topics during strategy making and making strategy more hands-on (Bürgi et al., 2005; Whittington et al., 2006). The data set illuminated how playfulness and material representation enabled organisational actors to clarify immaterial ideas, materialise emotions and see the stories of others. Taken together,

these instruments enabled organisational members to literally feel and sense their way through strategy.

6.2.1 Clarifying immaterial ideas

Clarifying immaterial ideas occurred where organisational actors used materials to showcase their ideas without immediately explaining the meaning behind the materials. What the video-recordings also pointed to was how the materials appeared to present almost a universal understanding, where other organisational actors appeared to also understand what the toys represented. For the Blueberry team, the video-recorded episodes showed at times, a lack of verbal communication between Mila and Daemon. Consider the vignette in Box 25. The interaction between the sustainability lead and CEO relied primarily on the use of their bodies, facial expressions and materials to express their thoughts and ideas, rather than using spoken or written words. The materials themselves prompted actors to move away from pursuing procedural rationality (Simon, 1976) and the analytical and logical means to bring topics to surface. Instead, actors brought forward different materials based on feeling and intuition and placed these on the centre of the table, without any means of verbal communication

BOX 25 – LEGO SHRUBS AND SUSTAINABILITY AT BLUEBERRY

Mila is working in silence as she looks for materials to bring to the centre of the construction. At this point, Daemon is sat observing Mila and looking at the materials she is bringing to the table. Mila then looks continues to look for materials and this prompts Daemon to also do the same. They take time searching through boxes of toys and Mila eventually pulls out two green Lego shrubs and places these in the centre of the table. Daemon looks up at the shrubs and ever so slightly nods his head. The two continue to bring different objects to the table. Later, the facilitator points to the green shrubs and asks their meaning. Daemon responds that they represent "The sustainability side of what we do… a programme specifically focused around sustainability and green skills." Mila is seen nodding in agreement as Daemon unpacks the meaning behind the green shrubs. (Field diary)

Box 25 illustrates how Mila and Daemon created meaning by embedding ideas within materials. When Mila placed the Lego shrubs in the centre of the table, Daemon appeared to understand the meaning of these shrubs without Mila having to verbally share what the shrubs represented. This was later shown where Daemon explained to the facilitator that the shrubs

symbolised the sustainability programmes offered by Blueberry, with Mila nodding in agreement. While the open-endedness of materials may impose some limitations on clarity during strategy-making, the flexibility in understanding materials supported Mila and Daemon in attending to the same topics (Pyrko et al., 2017) and the progression of sustainability programmes within Blueberry. Using materials to present ideas thus served as a springboard (Burke & Wolf, 2021) for organisational actors to engage in subsequent strategic debate, where the Lego shrubs prompted Daemon and Mila to consider more deeply the role of sustainability within Blueberry.

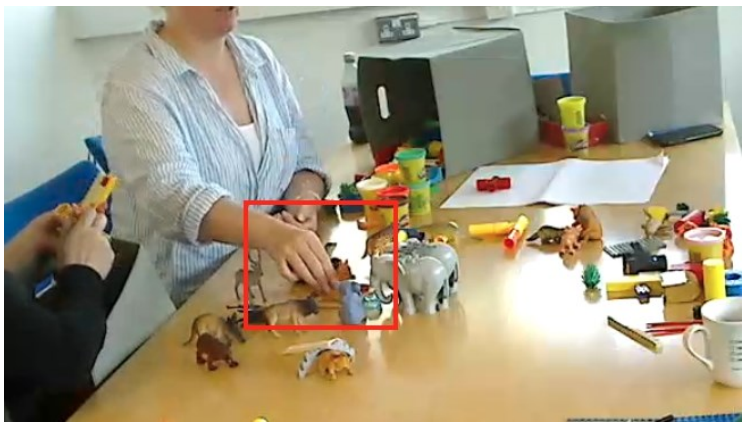
6.2.2 Materialising emotions

Materialisation emotions occurred where organisational members raised more personal sentiments during the strategy workshop because the discussions felt 'less personal' as actors used the materials to communicate their emotions. These personal sentiments stemmed from what organisational employees felt were downsides of the current business strategy. Consider the vignette in Box 26. This illustration depicts how seemingly meaningless material interaction supported Claire in revealing her feeling of "resentment" regarding the lack of boundaries at Capricorn. Box 26 shows how actors engage in seemingly purposeless behaviour as they play with the materials, with Claire moulding Play Doh and flattening it out into various shapes using her hands. Later, her physical interaction with the materials inspired her to reveal her resentment of being instructed to complete tests, which Claire believed isn't part of her job role. Upon revealing her emotions, she uses different animal figures and places the animal figures on the Play Doh (Figure 6.1) to symbolise how the animals don't always fit. This action shows how Claire used materials to extend their sentiment and strengthen their position.

BOX 26 – CLAIRE SHARES HER RESENTMENT

The Capricorn team are seen engaging individually with the materials. Lois has a box on her lap and appears to be searching specifically for small Lego bricks. Upon finding a brick, she stacks these on top of each other to create a larger Lego construction. Zena is seen standing up from her chair, pacing slowly and looking at the material landscape on the table. She sometimes steps back, leans against the windowsill and turns her head to the side. She looks as though she is thinking intently about the material landscape. Claire is playing with a piece of Play Doh, rolling this into a ball in her hand, then flattening it on the table. She then picks the Play Doh up again and moulds this into a new shape and flattens the Play Doh on the table once more. Lois and Zena then begin discussing the problems with changing the job roles of their current employees. Claire looks up at the co-founders and comments how team members may not want to undertake different roles as this wasn't what they agreed when they joined Capricorn. Claire pauses for a moment and then quietly says "You make me do these tests. It's actually something I feel quite resentful about, because that's not what I was every employed for." Claire then grabs a cheetah and explains how the cheetah won't fit into the Play Doh because the Play Doh is for the squirrel. This prompts a discussion between the participants surrounding working roles within Capricorn. (Field diary)

Figure 6.1: Claire positioning animal figures on top of a Play Doh platform



Claire's talk of feelings of resentment being tasked with the completion of tests was revealed as part of her playful interaction with the toys. Such sentiments were kept suppressed during the pre-observation phase, where Claire would seldom raise personal emotions in the presence of the co-founders. From her post-workshop interview, Claire explained how she was able to remove herself from these challenges through the play, as she explains below.

> "There was definitely an element of like, almost like an emotional release… being able to talk about difficult challenges and being able to represent them and also remove ourselves from them via the play." [Claire]

Bringing physical form to personal emotions thus enabled actors to detach themselves from these issues, which could support the sharing of these ideas in the context of strategy meetings. In other words, attention is focused on the materials and in Claire's case, the animal figures on top of the Play Doh, rather than Claire herself. Diverting attention towards the materials showcased the capacity of playfulness in enabling organisational members to visually represent their emotions and bring this forward in the presence of managers to address as areas of focus.

6.2.3 Seeing the stories of others

Seeing the stories of others occurred where organisational actors used the toys to create a visual representation of their narrative. For other members of the organisation, being able to literally see the story in physical form through the toys helped engender greater understanding than if the stories were told through verbal discourse alone. Consider the vignette in Box 27. This vignette illustrates how Adam displayed signs of deep immersion with play, as he searched and pieced various toys together (Figure 6.2). Adam later used his construction to share his narrative surrounding other predators, who are competition for the same customers. As Adam explains this narrative, he picks up the animal figures and moves the animals in circles, as if they are trapping the customer base. Following on from Adam's animation of his material landscape, the team focus on how they can manage their competitors, which Adam described as being predators.

BOX 27 – THE PRESSURE OF PREDATORS

The facilitator informed the team that the workshop would be drawing to a close and began to guide participants to the final part of the workshop, where they would be looking towards the future of their business. While the facilitator was talking, Tam appeared to be listening closely to the facilitator but Adam appeared fixated on the toys in front of him. He was stacking various Lego platforms together and placed this in the centre of the table. Adam then turned his head and looked across the table. He seemed to be searching for a particular object. He reached over and picked up a tiger, baboon and a fox and positioned the animal figures around the Lego platform he had just created. Meanwhile, Kylo was also piecing together small Lego bricks in front of him, but he stopped to observe Adam and watched as he created a material landscape. Later, Kylo expresses his concern over Rubix's lack of customers. Adam immediately responds and picks up the baboon and fox from his material landscape and explains how "other predators have the same customer base." Kylo nods in agreement as Adam moves the animal figures in a circle, entrapping the customer base. This results in the team moving onto navigating their current market and customer outreach. (Field diary)

Figure 6.2: Adam's predators

This physical narrative used by Adam supported his viewpoint that the challenge of not having enough customers was a result of intense competition caused by external predators. This contrasted with Kylo's view that he previously shared during the workshop where the managing director placed responsibility with the Rubix team for being unable to secure customers. Thus, the act of Adam physically creating a visual landscape later supported his narrative that the challenges facing Rubix were not always due to underperformance of the team, but due to external threats and predators. The use of visual and material tools thus supported Adam creating a deeper and shared understanding, as reflected in his quote below.

> "By [using] metaphors, it allows for a deeper understanding of the emotional aspect." [Adam]

The visual and physical representation of ideas was significant for creators in having their narratives supported by materials and this was also significant for the wider team in gaining a deeper understanding of the viewpoints of different actors. These visual narratives also helped convey richer meaning, where Adam's representation of predators showcased his view that the challenges facing Rubix are more external rather than the team underperforming, which Kylo previously alluded to earlier in the workshop.

6.2.4 Summary

The purpose of this first section has been to illustrate through the use of vignettes how organisational actors use the materials to gain understanding by doing and how the materials become extensions of their own body to communicate ideas and understanding (Pyrko et al., 2017). For Polanyi (1966), people know more than they can tell and in line with this assertion, it is not always easy for actors to "tell" others of their ideas using spoken words alone. March's (1971) sensible foolishness has shown how physical interaction with toys and playing can provide a platform for organisational actors to present, share and also support their ideas through physical and visual means. While a lack of clarity may be a limitation of using material props due to their open-ended nature and capacity for interpretation, these toys propagated a recognition of immaterial ideas and provided actors a way to detach themselves from their emotions, so that these feelings could be brought to focus. The use of toys as visuals also helped other organisational actors in appreciating the narratives of others as these stories were communicated through toys and the animation of these toys. This section has begun to unpack how organisational actors use material toys to feel and guide their ideas during

strategy-making. This lays the foundation for the sharing of tacitness where the next section will detail the mechanism for how tacitness can be shared through actors feeling and visualising strategy.

6.3 Sharing tacitness in strategy workshops

So far, this chapter has uncovered the capacity of playing to support organisational actors in clarifying immaterial ideas due the physical and visual representation of these ideas through the toys. This materialisation also enabled participants to share their emotions and feelings as the physical visuals enabled actors to detach themselves from these emotions. This detachment also manifested in actors projecting their narratives into a material landscape, enabling other actors to physically see the stories of others to help reach a shared understanding. The following section will delineate how visualising through playfulness and using the materials as an extension of the body, can support organisational in communicating tacitness that relies less on spoken words and more on physical and visual cues. This section will cover three phases in the mechanism: diverging perspectives, bracketing focal topics and resolving ambiguity.

6.3.1 Diverging perspectives

Generating diverging perspectives occurred as organisational actors playfully interacted with materials and used materials to guide strategic debate. Through playing with the toys, organisational actors revealed divergent propositions and at times, a lack of unity among organisational actors. The significance of bringing to surface different perspectives through playfulness and visual representations using the toys offers actors an alternate means to reach procedural justice, which argues for the prioritisation of fair procedures in decision making as people react to the outcomes of decisions in terms of how decisions were made (Kim & Mauborgne, 1991). In particular, procedural justice focuses on how decisions are made and the way people are treated during the decision making process and the degree of fairness they feel (Ackermann & Eden, 2011). Causal mapping is a way to achieve this and while these maps offer a visual dimension, there is continued focus on language (Ackermann & Eden, 2011) to logically construct these visual representations. I will now show through vignettes how playfulness can enable diverging propositions to be presented during strategy workshops and how the physical and visual representations can help actors reach procedural justice.

For the Capricorn team, the video-recordings showed Zena, Lois and Claire first inspecting the material and 'feeling' their way through the boxes of toys. The nature of the toys invited physical exploration from the participants who were observed searching through boxes of toys with their hands and sometimes picking out a particular object to look at more closely. This process was essential to enable organisational actors to familiarise themselves with the toys and to become acquainted with the physical properties of the materials. Consider the vignette in Box 28. As the team began to integrate themselves with their materials, the process of divergence took place as each member of the Capricorn team showed a different physical representation through the materials.

BOX 28 – WHAT IS CULTURE?

A cluster of animal figures had been positioned in the centre of the table by the actors. Lois, looking at the animals, carefully adjusts their positions and places the animals closer to each other. Zena follows Lois' initiative and adds a koala and lion to the cluster of animals. Referencing the animals, Lois comments how she feels employees at Capricorn are not committed and just come to work to get paid. Meanwhile, Claire remains silent as she looks through the materials and begins connecting different coloured pipes together. This prompts Lois to ask Claire what she is working on, to which Claire responds that she doesn't think what Lois and Zena describe about a lack of commitment from the team as culture. Claire continues to connect the different coloured pipes together and places the pipes in the middle of the animal cluster. Claire then explains how the pipes show connectedness and boundaries among the animals, as she re-positions the animal figures around the connecting pipes. (Field diary)

The vignette in Box 28 shows how a seemingly purposeless interaction with materials enabled organisational actors to share their differing perspectives surrounding organisational culture. Using the animal figures, Lois comments how she feels a lack of commitment from some of the team. However, through materialising her ideas, Claire uses the connecting pipes (Figure 6.3) to represent boundaries and connectedness, which is how she sees culture, rather than in terms of commitment levels, as Lois previously mentioned. The use of the materials to visualise what Capricorn's culture is, revealed two different perspectives, with Lois emphasising commitment and Claire showing connectedness. By positioning the connecting pipes in the middle of the cluster of animals, Claire combines these two perspectives, showcasing the capacity of play in bridging contrasting perspectives through material

representation. Her positioning of the pipes in between the animals shows how Claire intends to bring these perspectives of culture together, rather than leaving these perspectives divided.

Figure 6.3: Claire's connecting pipes and the cluster of animals

Box 28 illustrates how contrasting perspectives were made apparent through playful interaction with the materials, which led to organisational actors sharing their positions through the materials. The process of diverging manifested differently during the strategy workshop for Rubix. Here, the materials facilitated actors to share their opinions and attend to procedural justice, which resulted in tensions between the participants to arise. Consider the vignette in Box 29. The vignette describes how Adam remained focused on his materials and piecing together various Lego bricks. Upon hearing Kylo's views, which Adam disagreed with, Adam voiced his concern while also pointing towards his material landscape, that appeared to represent two competing forces, reflecting himself and the managing director.

BOX 29 – TOO MUCH OR NOT ENOUGH CREATIVE FREEDOM?

Adam is piecing together small Lego bricks. He appears to be constructing two pillars of bricks and he searches around for more of these small Lego bricks to add to the construction in front of him. Adam, does not seem to be paying too much attention to Kylo, who is talking to the team regarding the completion of tasks. Instead, Adam seems focused on his Lego bricks and joining the bricks together. Kylo then expresses his concern that he feels the team have too much creative freedom. At this point, Adam looks up from his Lego construction, his facial expression visibly unhappy with Kylo's comment of the team having too much creative freedom. Adam then explains how he feels he doesn't have enough creative freedom. As Adam is sharing his concern, he uses his hands to gesture to the two Lego blocks in front of him that he had just created. (Field diary)

Box 29 draws attention to how visualising ideas through materials can support organisational actors in bringing forward their personal views. Here, Adam uses two separate piles of Lego (Figure 6.4) to signify competing forces within Rubix and the contrasting views between himself and the managing director. This physical representation gains significance when Adam challenges Kylo's view that the Rubix team have too much creative freedom.

Figure 6.4: Adam's blocks of Lego

This resulted in tensions arising between the two actors, with Adam commenting that his work is continuously being shaped by Kylo. However, despite the feeling of tension between Adam and Kylo, the materials allowed these conflicting views to be presented and the visual and

physical representation provided a new way of thinking and supported understanding of ideas, as reflected in Adam and Kylo's quotes below.

> "When you can see [ideas] physically laid out in front of you… [you're] thinking, OK, if I place this there and not there and I turn it away… it's a new way of thinking." [Adam]

> "[The models] helped initiate some discussions… [and] helped me understand other people's point of view." [Kylo]

Overall, the two vignettes illustrate different manifestations of how diverging perspectives come to surface. Box 28 showed how Claire used the toys to physically and visually show her perspective but also her intention to align her and Lois' views by positioning the connecting pipes within the cluster of animal figures. Box 29 however showed how Adam used his Lego bricks to challenge Kylo's view that the team have too much creative freedom when they carry out their tasks. The bricks were a visual representation of how Adam viewed him and Kylo as having competing thoughts. The post-workshop interviews revealed that Kylo found the physical representation of ideas supported his understanding of the different perspectives of the team and Adam reflected on how physically seeing the materials in front of him, encouraged him to think differently. Altogether, the surfacing of conflicting ideas showed how the physical representation of ideas enabled organisational actors to present their viewpoints and shares these views through physical visualisations.

6.3.2 Bracketing focal topics

Bracketing focal topics occurred where organisational members created a pecking order of organisational issues in terms of their urgency. During this phase, actors sometimes represented their propositions using minimalistic structures. These were less elaborate compared to the collective construction, which involved various intricacies and several separate components, each with their own meaning. These minimalistic structures however, supported actors in creating a common and shared understanding that protected core issues of urgency relating to their organisation that demanded attention. Given the simplicity offered by the material representation, organisational actors were also able to achieve greater clarity.

During their strategy workshop, Daemon and Mila shared different perspectives surrounding the future of Blueberry, where Daemon expressed his concern to look at "different ways to bring revenue" into Blueberry. On the other hand, Mila's concern was related to (what she felt)

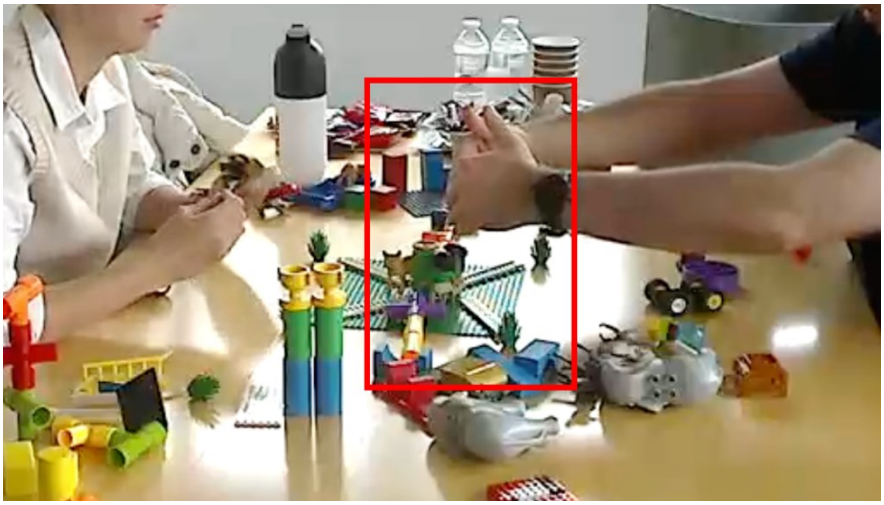
as Blueberry shifting towards being “finally driven” rather than a “socially driven organisation.” At this point, organisational actors had revealed their differing viewpoints, though prioritisation of these perspectives had not yet taken place. Consider the vignette in Box 30. Here, through building and constructing a visual landscape with the toys, Daemon was prompted by Mila’s initiative to recognise how the purpose of Blueberry’s revenues is to feed into their community of entrepreneurs.

BOX 30 – MIRRORING ACTIONS

Mila begins by bringing a Lego ladder to the centre of the table and places the ladder in one corner of a Lego platform. She repeats this action and places another ladder in the opposite corner. Daemon, watching Mila, mirrors her action and finds two further ladders and places the ladders in the two remaining corners. Mila then finds some connecting pipes and places them on one side of the construction. Daemon again, mirrors Mila’s actions and places connecting pipes on the other side of their construction. Mila sits back in her chair and pauses to look at their construction. Daemon then comments how the pipes show the capacity of revenue to “feed into” their entrepreneurial community. Mila responds with an eager nod and a loud “yes” as she leans forward and searches for more materials to add to their construction. (Field diary)

Box 30 illustrates how materials enabled Mila and Daemon to identify a zone of focus for Blueberry, that is revenue being reinvested into the business. Throughout the workshop, Daemon maintained his position that a significant challenge for Blueberry was a lack of, and unreliable funding source for the organisation. For the CEO, his priority aligned with the finances of his business but for Mila, her concern remained centred on Blueberry drifting from its social mission. Box 30 shows how Mila and Daemon begin by feeling through the materials and positioning the toys in front of them, which prompts Daemon to recognise the significance of the connecting pipes in representing how funds are needed to reinvest into Blueberry to support their entrepreneurial community. Daemon also points towards the connecting pipes and showcases with his hands (Figure 6.5) how the funds move inwards, towards their community.

Figure 6.5: Daemon moving funds inwards to the community



By feeling their way through the materials, Box 30 shows how changes in mind-sets can be achieved where Daemon understood Mila's perspective and the importance of bringing focus back to the community of entrepreneurs, as reflected in his quote below.

> "Where we've got confused is because there's a commercial focus as a means to an end to achieve this [points to the entrepreneurial community in their construction]… Where we've become confused is we've forgot about that [points to community again] and we're just focused on people who are paying… but the way that value then comes back, that's the bit we kind of need to focus on." [Daemon]

For the Rubix a team, a recurrent topic that continued to surface during strategic debate centred on the working progress of the team. On different occasions throughout the workshop, Kylo shared his dissatisfaction that organisational members were failing to deliver on their tasks, namely Tam, Henry and Adam, who delayed completion of teaching notes, which are required to run the teaching courses in the Rubix learning centre. Consider the vignette in Box 31. Kylo begins by verbally sharing is concerns with the Rubix team. He then picks up some Lego toys and positions these materials on the table in front of the Rubix team. The process of materialisation and sharing his concerns visually enabled Kylo to bracket the most significant challenges facing Rubix internally.

Box 31 shows how Kylo's initial concern relates to his feeling of being unable to fire employees and employees at Rubix who believe they won't be fired. After Kylo expresses his sentiment, he attempts to attach a Lego ladder to a Lego builder but is unable to do so. Kylo spends a few seconds trying to join the two objects together (Figure 6.6) but fails and this prompts Kylo

to explain how he is unable to force employees to complete their tasks, just as he was unable to force the ladder into the hand of the builder.

BOX 31 – THE LADDER AND THE BUILDER

Kylo is sitting back in his chair as he expresses his frustration that assigned tasks for the week are not being completed by the team and that the team should take responsibility and ownership of their assigned tasks. He then goes onto say how every organisation needs the ability to fire people and Kylo also expresses how he does not have that ability, as he believes the Rubix team know they will not be fired (perhaps because they are brothers). While Kylo is talking, the rest of the team are silent. Tam is seen rolling some Play Doh in his hand while Jane and Adam look down at the materials on the table in front of them. Kylo, looking visibly stressed, pauses and rubs his face with his hands. He then leans forward and looks at the toys in front of him on the table. Kylo then picks of a Lego ladder and tries to attach this into the hand of a Lego builder, which had previously been used to represent Rubix's content creators. Kylo seems to struggle in attaching the ladder to the builder and he eventually gives up and places the ladder on the table. He then comments how he is unable to force anyone to complete the work but consequences need to be in place. Adam then reinforces Kylo's sentiment and that Rubix need to have processes for consequence in place. (Field diary)

Figure 6.6: Kylo attempting to attach a Lego ladder to the hand of a Lego builder

This prompts Kylo to bracket the issue of having a system of consequences in place for underperformance, which is reinforced by Adam. Thus, bracketing occurred where Kylo sought to visually represent his concern with the toys, which allowed him to realise the main

challenge relating to incomplete tasks was not his inability to fire people, but the business lacking an established system of consequences. Bringing the topic of establishing consequences to the attention of the Rubix team showcases the capacity of how visual representations arising from play allows significant issues the be addressed, that had been previously overlooked, as reflected in Kylo's quote from his post-workshop interview below.

> "There were certain issues that hadn't been discussed as a team and as a result of the [play], it allows those issues to kind of, you know, come to the forefront… there were some things that wouldn't maybe have been mentioned [otherwise]." [Kylo]

In sum, the materials that were used in the process of bracketing focal topics were often minimalistic in their design. As illustrated in the vignettes, Daemon used connecting pipes to show the inward flow of investments to their entrepreneurial community and Kylo used a ladder, which prompted his realisation that a system of consequences needs to be enforced at Rubix. Bracketing highlights how materials and the body are used as a means to bring emphasis to certain topics, rather than conveying meaning through spoken words. Visually and physically translating immaterial ideas into material form, offered the means to highlight and bracket critical areas of concern. The minimalistic nature of the material representation also helped provide clarity to organisational actors and aided understanding, as reflected in Adam's quote below.

> "I like this idea visually representing ideas… when we see these visually represented concepts, it allows us to understand them in a better and clearer way." [Adam]

6.3.3 Resolving ambiguity

Thia final phase explores how the physical visualisation of ideas can contribute to resolving ambiguity during strategy workshops. While ambiguity has been regarded as being useful to accommodate different perspectives (Davenport & Leitch, 2005), for the SMEs who participated in this study, they were vulnerable to the dark side of ambiguity where divergent views could result in ambiguous agreements leading to decision making without action, or escalating indecision (Denis, Dompierre, Langley, & Rouleau, 2011). For these businesses, the existence of ambiguity could impede the actioning of decision making or even no decisions being made at all, and risk being trapped within short term operations. Hence, the following section will unpack how material visualisation through playfulness supported organisational members in resolving ambiguity, which occurred where consensus was reached by visualising

ideas in tangible form that sustained throughout the workshop, rather than an immaterial idea that was verbally disclosed and at risk of being forgotten or easily dismissed.

For Blueberry, the strategic episode began with Mila and Daemon expressing concerns related to their uneven flow of projects. The issue centred on Blueberry experiencing peaks and troughs of incoming projects coming throughout the year. At peak times with a large project, the team would feel overstretched but after this peak, Mila and Daemon experienced months without any incoming projects, thus putting strain on Blueberry's financial position. Daemon attributes the uneven flow of projects to Blueberry being heavily reliant on revenue coming predominantly from the public sector, which causes Blueberry to be "exposed to a lot more risk." Mila responds by saying she doesn't feel the uneven intake of projects causes financial problems but rather "problems in terms of continuity." Daemon's concern was thus more centred on Blueberry's financial health whereas Mila's concern revolved around Blueberry's social impact. There was thus uncertainty between how the CEO and sustainability lead interpreted the uneven inflow of projects and the resulting impact for Blueberry. Consider the vignette in Box 32. Here, when encouraged by the facilitator, Mila and Daemon proceed to visually showcase their thoughts through playful interaction with the toys.

BOX 32 – OVERCOMING PEAKS AND TROUGHS

Mila and Daemon were discussing the uneven dispersion of projects facing Blueberry and how the business is almost unable to cope when there is an influx of projects and Daemon also highlighted financial struggles during less busy periods. The facilitator prompts the participants to interact with the materials. Mila then pushes some animal figures next to the aardvark and lizard (which represent her and Daemon) and Daemon positions these animals so they are standing in a straight line together. Daemon then looks inside a box of toys with his hands and pulls out some connecting pipes. He places these pipes in front of each of the animal figures. He pauses and looks at the material landscape in front of him. Daemon then pulls apart some of the connecting pipes, so that they are shorter in length. While Daemon is adjusting the pipes, Mila brings forward a couple of green Lego shrubs and places these by the end of the connecting tubes. When the facilitator asks about the additional animal figures, Mila responds by saying how hiring the right people will "allow us to diversify in terms of region, like maybe even outside of the UK" and help Blueberry "bring in bigger and broader opportunities." Daemon smiles and nods in agreement as he echoes the significance of bringing in "the right people" to Blueberry. (Field diary)

Box 32 shows how Mila and Daemon evidence less (obvious) signs of disagreement when they represent their ideas visually using the toys. Neither participant objects to the addition of animal figures or connecting pipes when these are brought into the material landscape. When the facilitator enquires about the additional animal figures in their landscape, Mila explains how Blueberry would benefit from hiring people to expand the outreach of Blueberry and to extend the scope of their social impact. Daemon then reinforces Mila's sentiment and explains how individuals with other connections can help sustain Blueberry during quieter periods, such as the summer months, as reflected in his quote below.

> "So in the months where this isn't there because everyone goes away on holiday in August, actually maybe there's something else there, whether that's a different type or source of funding… not just UK funding but from other markets as well." [Daemon]

Mila's proposition of expanding Blueberry's core team and bringing on people with networks outside the UK proved appealing to Daemon, who mirrored Mila's sentiment and emphasised how having a team with connections to clients in other markets may help overcome the periods where Blueberry is running without projects. The physical visualisation using toys showed how Blueberry's CEO and sustainability lead used materials as a means to guide strategic debate, where Mila's act of bringing additional animal figures to the centre of the table provoked debate

that centred on solutions for the future of the business. The capacity of visualising through playful interaction supported actors in shifting their mindsets to be more solutions-oriented and helped overcome individual uncertainties, as reflected in Mila's quote below from her post-workshop interview.

> "It [play] definitely like made it away from individuals and more to like solutions based, which I think was really helpful because we as a company have a tendency to blame certain people. So that was quite nice for it to sort of be about, okay, let's just think about this business itself and use play." [Mila]

The video-recorded workshop for the Capricorn team further highlighted how the use of materials and physical and visual representations helped the team identify the causes of issues and changes to be made within the business. During the strategy workshop, by positioning three elephants within their material landscape, Lois proposed how she and Zena could expand into research and the private sector as a potential avenue for diversification. Consider the vignette in Box 33. Here, there is an uncertainty between Lois and Zena surrounding why they find themselves unable to pursue their options for diversification.

BOX 33 – BOUNDARY-LESS ANIMALS

Zena and Lois were looking at their material landscape, which had three elephants each facing a different direction. Lois explained how the elephants symbolised her, Zena and Claire, pursuing different options for the growth of Capricorn. Zena picked up an elephant in her hand, briefly, then placed the elephant down again. When prompted by the facilitator, Lois continued to explain their material landscape and she pointed to a cluster of animal figures behind the elephants and how these animals provide support so that the elephants can go out "in the wild" and find opportunities. Zena, who was visibly excited when Lois initially shared her narrative of the elephants, appeared a little disappointed when Lois shared her narrative surrounding the cluster of animal figures. Zena then explained her concern surrounding the lack of boundaries in place at Capricorn. (Field diary)

Box 33 shows Lois' interpretation of the animal figures behind the elephants, who are tasked with providing support to enable the elephants to go into the wild. This metaphor represented Lois' expectation of the Capricorn team in managing the day-to-day running of the business e.g. travel and accommodation bookings and workshop delivery, to allow her and Zena to focus on Capricorn's strategy. Currently, this is not the case and Zena and Lois have both expressed their dissatisfaction about being involved in the undertaking of trivial tasks in the business. However, upon Lois sharing her perspective of the animals, Zena interjects and

comments on the lack of boundaries being a more principal concern. For Zena, visually seeing the animal figures roaming freely behind the elephants prompted her realisation that working boundaries at Capricorn had not been clearly defined and because of this, she and Lois have been completing tasks they believe fall outside their remit as co-founders, as reflected in Zena's quote below.

> "It's fundamental, because actually, we can't free ourselves if we haven't established what our boundaries are." [Zena]

Previously during their workshop, Claire had created a boundary made from Play Doh and used this to show how different animals wouldn't fit inside the same boundary. The Play Doh boundaries were missing from the material landscape depicted in Box 33, which prompted Zena to realise the significance of having clear boundaries relating to working roles for the Capricorn team in place. Lois nods her head in agreement with her co-founder. Box 33 also spotlights how using materials to visually represent the future of Capricorn offered organisational members clarity surrounding the different components within their vision e.g. the elephants at the forefront and the cluster of animals behind the elephants. Having the material landscape in central view of organisational actors prompted discussion surrounding the hurdles that prevented them from achieving their goals of diversification, which ultimately centred on the lack of boundaries. Having roles that were not clearly defined resulted in Zena and Lois being tasked with the day-to-day jobs of running the business and prevented them from pursuing growth opportunities. Thus, the material construction provided clarity for Capricorn's co-founders, who concurred that processes and boundaries would need to be implemented so as to provide employees with clearly defined roles. Box 33 therefore underlines how a physical and visual representation provides a point of reference for organisational members, which sparks conversation based on the material construction.

6.3.4 Summary

In summation, this section has unpacked the phases that contribute to the sharing of tacitness during strategy workshops. To reiterate, drawing on existing research on tacit knowledge (Hadjimichael et al., 2024), I refer to tacitness as any topic of focus (e.g. confronting managers, challenging strategic direction, revealing personal emotions) that organisational actors find difficulty in conveying with spoken words alone. This was reflected in the post-workshop interviews, where participants revealed how they felt more able to discuss more personal

topics through physically visualising ideas with the toys on the table. Consider the quotes below from Claire and Daemon.

> "The depiction of themselves via metaphor, kind of allows them to be a bit kind of external from the story and see it how other people might see it." [Claire]

> "One of the things I think it [play] helped to do as well, was almost make it less personable." [Daemon]

Having explored the phases that emerged during the strategy workshops that supported organisational actors in sharing tacitness through material visualisations, the next section of this chapter will present a mechanism based on the three phases discussed above to delineate the process for how tacitness can be shared.

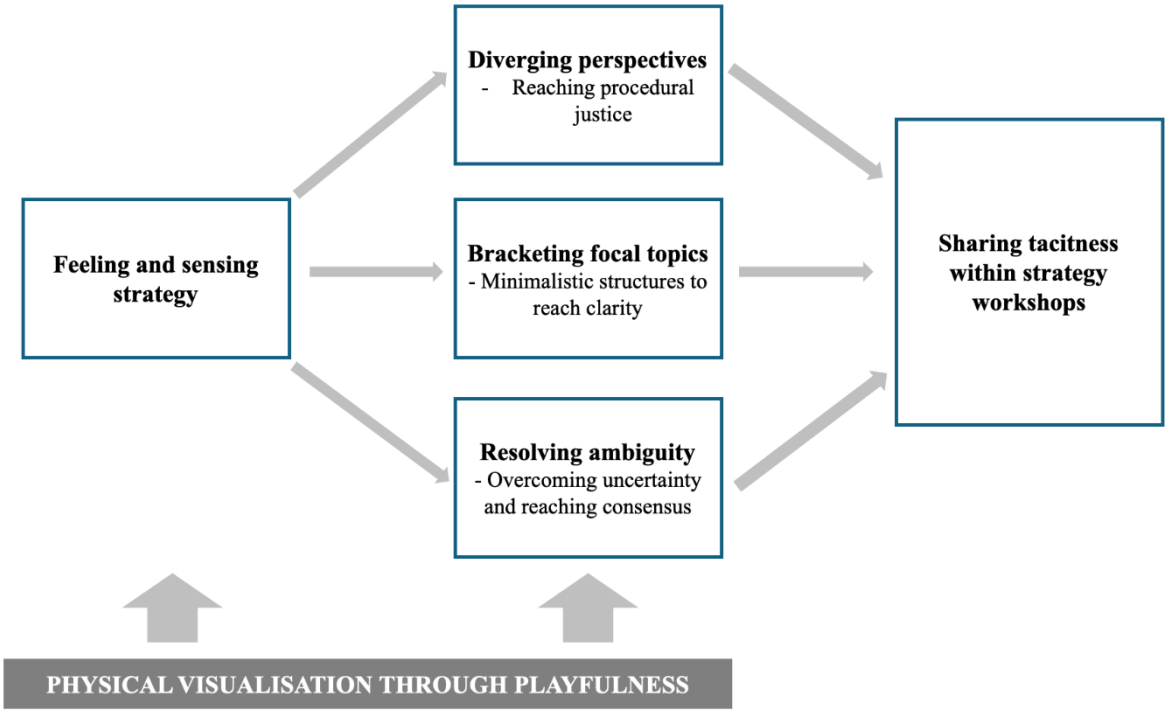
6.4 The mechanism for sharing tacitness

The findings presented in this chapter provide an alternate view to understanding how strategy is understood, shared and communicated in the context of strategic workshops. For Polanyi (1958), people are not always aware of their actions when they perform particular tasks and so there is a difficulty in being able to carefully articulate the particular components of different actions. In particular, Polanyi emphasises how there are certain things we ourselves know but struggle to convey to others, which can be understood as the tacit component (Pyrko et al., 2017). The video-recorded data showcases how playfulness in strategy offers organisational members a different means to articulate their actions through material representation and visualisation, which verbal and written discourse struggle to convey. These material representations also helped organisational actors in reaching clarity on a given topic. In bringing materials and the body to the forefront in these strategic episodes, the video-recorded data set reveals three phases that occurred during strategy workshops to enable the sharing of tacitness. In particular, the findings from this chapter point towards the non-discursive aspects of strategy work (Jarzabkowski et al., 2022) and spotlights the non-verbal means of communication in strategy-making.

The mechanism presented in figure 6.7 illustrates four phases that contribute to the sharing of tacitness between organisational actors during strategy workshops. Through feeling and sensing strategy, actors clarify ideas and materialise their emotions by physically visualising their ideas through playfulness. These immaterial concepts in the minds of actors are thus given tangible form through playful interaction with toys. These material representations

prompt actors to engage in storytelling and the narratives shared are more readily grasped by other organisational members, given the physical visualisation of these stories. Using the materials as guiding tools, actors begin to literally feel their way through strategy. Feeling and sensing prompted three further processes to evolve over the course of the workshop. First, through diverging perspectives, organisational actors were more able to reveal their positions and challenge viewpoints they disagreed with. These positions were supported by material visualisations, that helped organisations feel their claims were validated due to the physical presence of their ideas. Sharing their positions through material representation also offered an alternate route to reaching procedural justice, where contributions were shared through tangible visuals. Second, through bracketing focal topics, the use of minimalistic structures and singular toys (e.g. a Lego ladder or connecting pipe), while less elaborate in the design, helped actors reach organisational clarity. Third, through resolving ambiguity, the physical visualisations supported actors in navigating through uncertainty and challenges that actors each interpreted differently. Taken together, these processes contribute to the sharing of tacitness, where organisational actors communicate through and with the materials, which is enabled by physical visualisation through playfulness.

Figure 6.7: The mechanism for sharing tacitness



The findings from this chapter diverge from the body of research that tends to focus on the discursive aspect of strategy (Balogun et al., 2014). While Mintzberg (1994) noted because

strategy comprises abstract and immaterial concepts in the minds of actors, strategy cannot be tangible. The findings from this chapter challenge this perspective as findings reveal how strategy is directly comprised from matter that can take physical and visual form through playfulness. The use of physical representation and the tangible, visual dimension offers an alternate means for actors to convey meanings and understandings (Paroutis et al., 2015). The findings from this chapter contribute to our understanding of visuality in strategy by illustrating "*how* visuals do more than they *show*" as these visuals provide organisational actors with a way of seeing strategy meaning, which can in turn provoke conversation (Knight et al., 2018, p. 896) and resolve ambiguity. In particular, I extend the capacity of visuals in strategy making through the process of play and role of the body. Analysis of the video-recorded data revealed how physically creating and visually seeing strategic issues and creating strategic goals, helped organisational members in sharing explanations that were challenging to convey with dialogue alone (Bell & Davison, 2013), which participants echoed during their post-workshop interviews. Most significantly, this chapter sheds light on how organisational actors can share tacitness, which is not solely limited to tacit knowledge but those topics, grievances and emotions that organisational actors find difficulty in raising and communicating during 'normal' workplace settings in the absence of play.

This chapter therefore offers two key contributions. First, the proposed mechanism for sharing tacitness illustrates how playfulness and resulting physical visualisations support organisational actors in sharing those sensitive and thorny topics (Knight et al., 2018), that otherwise may have remained hidden without the reinforcement from the tangible constructions. The mechanism also points towards how these physical visualisations stemming from play can support actors in resolving ambiguity (Knight et al., 2018). Research on ambiguity offers contrasting perspectives with some studies finding ambiguity being valuable and enabling organisations to accommodate different stakeholder views (Davenport & Leitch, 2005). Other studies have maintained how ambiguity is traditionally viewed as being challenging for organisations (Cappellaro, Compagni, & Vaara, 2021) due to the lack of clarity regarding a particular situation (Feldman, 1991) and having different ways in thinking about phenomenon (Feldman, 1989). In the context of the SMEs in this study, ambiguous meanings could result in failure to action decisions that were made. For these businesses, it was necessary to navigate through this uncertainty and to reach a mutual understanding, which was enabled through the physical visualisations that sustained throughout the workshops and became a tangible point of reference for actors to look back on. For Capricorn, this was the lack of boundaries within their working culture. For Blueberry, this was the divergence away

from supporting their community and for Rubix, this was the responsibility and accountability of the team and the lack of consequence. These core issues that emerged over the course of the strategic episode diverged to what the business initially sought to achieve e.g. widening revenue streams. Feeling through the materials and using the toys as guiding prompts enabled organisational members to peel back external layers of issues that ultimately revealed a core issue they were facing that was simple in both concept and physical representation.

Second, the findings from this chapter aim to extend our understanding of visuality in strategy making by advancing physical visuality through tangible constructions created through play. Visual communication has been identified as an essential skill for managers (Berinato, 2016) and yet, strategy researchers tend to focus on verbal and textual modes of communication within organisations (Meyer et al., 2013). This findings chapter reveals how tangible materials that have been transformed into a physical construction by organisational members through play, provide powerful visuals that empower actors to bring to light sensitive or contentious issues that the use of physical visuals can support in addressing more easily. While the findings from this chapter direct the spotlight onto the role of materials in strategy making, the physical representations and visuals that were created in strategic episodes acted as a platform to stimulate conversation to build upon what actors actually saw (Knight et al., 2018). Studies on visuality have also called for the development of more collaboration and participation in visual methods (Bell & Davison, 2013). Playfulness offers a valuable approach to understanding visuality where hierarchies can be temporarily suspended and new roles can be determined (Bakhtin, 1981) and enable wider contribution in creating visuals during strategy making. This more relaxed dynamic offers new insight into how processes emerge (e.g. clarifying immaterial ideas) through physical and tangible visuals constructed through play. This chapter offers an alternate stance to understanding strategy as being primarily discursive where the role of materials and the body have the potential to share tacitness, offer clarity and stimulate conversation through sensory immersion in strategy, drawing upon visualisation, physical touch and bodily engagement. It is anticipated these findings add to our understanding of strategy-making through visuals (Paroutis et al., 2015) that emerge from playfulness.

6.5 Conclusion

In conclusion, this chapter has sought to unpack how physical visualisations emerging through playfulness can support the sharing of tacitness during strategy workshops. Drawing on

Polanyi's (1962) concept of indwelling and March's (1971) sensible foolishness, this chapter zooms in on the role of the body and how organisational members use material objects to literally feel their way through strategy. Hence, this chapter diverges from the perhaps more dominant view in strategy research, which tends to focus more on spoken and written words. The video-recorded data provided a prime opportunity to spotlight the physical interactions that take place during strategy making and how these visuals contributed to organisational members reaching clarity and greater understanding. The physical visualisations emerging from playful interactions help organisational actors literally see and understand another person's perspective (Knight et al., 2018), that actors may find difficulty in conveying using discourse alone, especially for perspectives that are more personal or challenging. The use of visuals has been considered in the context of PowerPoint slides (Kaplan, 2011; Knight et al., 2018) and strategy maps (Paroutis et al., 2015), for example. This chapter extends our understanding of visuality by highlighting physical visuals that are created through playful interaction and aims to offer two key theoretical contributions.

First, the mechanism for sharing tacitness helps offer an understanding as to how organisational actors progress to a position to bring potentially sensitive or contentious topics to surface in the context of strategy making. There has traditionally been focus on how tacit knowledge can be shared and disseminated. Building on this understanding, I propose how tactiness extends into those feelings, ideas and personal sentiments, which organisational members may struggle to convey in 'normal' workplace settings with spoken words alone. The video-recordings revealed how sharing tacitness began with the materials themselves, which prompted actors to feel through the materials using their hands and engage in strategy making using enhanced sensory means. Feeling through strategy prompted three phases to occur: diverging perspectives, bracketing focal topics and resolving ambiguity. These phases surfaced through physical visualisation from playfulness, which provided a tangible point of reference that sustained through the strategy workshop. Actors would reference these physical constructions, which helped them reach a greater level of commitment in addressing issues can challenges that had been materialised through play.

Second, findings reveal how physical visualisation through playfulness during strategy making offers an approach to resolving ambiguity and sharing tacitness. Both ambiguity and tacitness may be characterised as being difficult to explain and resolve verbally in explicit terms. Given that ambiguity centres on different interpretations and tacitness is something that is difficult for outsiders to fully grasp, the video-recorded data revealed the power of how visually seeing a

core issue in tangible form offered organisational members clarity and commitment to their issue. Through minimalistic representations and visually seeing issues in material form pushed actors to identify the crux of challenges that differed to what was originally defined. The mechanism for visualising strategy provides an alternate perspective towards how tacitness can be shared between organisational members using play and visuals. Critically, this chapter zooms in on the non-verbal components of strategy and how physical visualisations stemming from playful interaction can help actors communicate and understand topics and issues that spoken words alone may have struggled to convey.

CHAPTER 7:

DISCUSSION AND CONCLUSION

7.1 Introduction

In his seminal publication, March (1971) put forward how we need technologies of foolishness to escape our logic of reason and to help us discover new and better goals. In line with this view, rational and objective thinking is seen as a confine that compels actors to strategise in accordance with pre-determined goals. What underpins technology of foolishness is the concept sensible foolishness and how playing (March, 1971) can provide actors with the means to first 'do' before they 'think' and for action to precede logical thought (Chia & Holt, 2009). To encourage practitioners to realise the value of enacting sensible foolishness in serious strategy making sessions, participants in this research were provided with innately playful materials (e.g. toys) to help create an environment of play and shift interactions and modes of thinking away from rational and logical approaches and towards creative and imaginative modes. The materials participants were provided with were common toys including Lego bricks, animal figures, different coloured building blocks and connecting pipes as well as Play Doh. The use of these materials to realise sensible foolishness also spotlighted the role of non-discursive elements of strategy work (e.g. Dameron et al., 2015; Werle & Seidl, 2015) that few studies have addressed. Much work within SAP continues to centre on strategy being a discursive phenomenon (Jarzabkowski et al., 2022).

To capture the non-discursive elements of strategy making, visual observations were crucial and this resulted in the need to video (and audio) record actors as they engaged in periods of playfulness and seriousness when interacting with the materials during strategy work. While video-ethnography is not a new research approach that scholars draw upon (e.g. Paroutis et al., 2015; Smets et al., 2014), this research focuses on the interplay between play and reason and the process by which this unfolds, which other serious play studies (e.g. Jacobs & Statler, 2006; Roos et al., 2004; Statler et al., 2009) pay less attention to. The video and audio recorded episodes of play in strategy allowed the oscillation between periods of playfulness and seriousness to be captured in fine detail and for the micro-interactions to be carefully unpacked and examined in depth (Thomas et al., 2011). Critically, the video-ethnographic data provided a unique example to study how playfulness progresses during the course of strategy workshops and the interplay between play and reason. The eleven hours of video ethnographic data revealed tensions that emerged during the strategic episodes, which also

led to the development of findings that were at times counterintuitive. For example, previous studies on serious play found that the views of the CEO continued to dominate where conversation was directed in accordance with the opinions of the CEO (Roos et al., 2004). The strategic episodes used in this research however revealed that through seemingly purposeless and playful encounters alongside material interaction, wider organisational actors were provided with space to voice their concerns and allowed for strategy making to be made more inclusive where existing hierarchies were temporarily suspended through material interaction.

Findings that stemmed from the strategic episodes were supported with post-observations and post-interviews with research participants to corroborate findings. Three key findings emerged from the data, that centred on the interplay between play and reason during strategy making sessions. First, the interplay between practices of sensible foolishness (play) and procedural rationality (reason) revealed an evolving fluidity (Chapter 4) between play and reason and unintended process affordances (Burke & Wolf, 2021; Gibson, 1977) that emerged from this interplay. Studies on materiality have explored the logical and objective application of material artifacts (e.g. Kaplan, 2011; Werle & Seidl, 2015) where scope for imaginative and creative application of these artifacts is limited. In creating an environment of play and temporarily suspending rational imperatives, the video recordings illustrated that counterintuitively, where purposive material interaction stemming from play can guide strategic thinking. Critically, findings illustrate the dynamic evolution of how practicing play and reason unfold during strategy workshops.

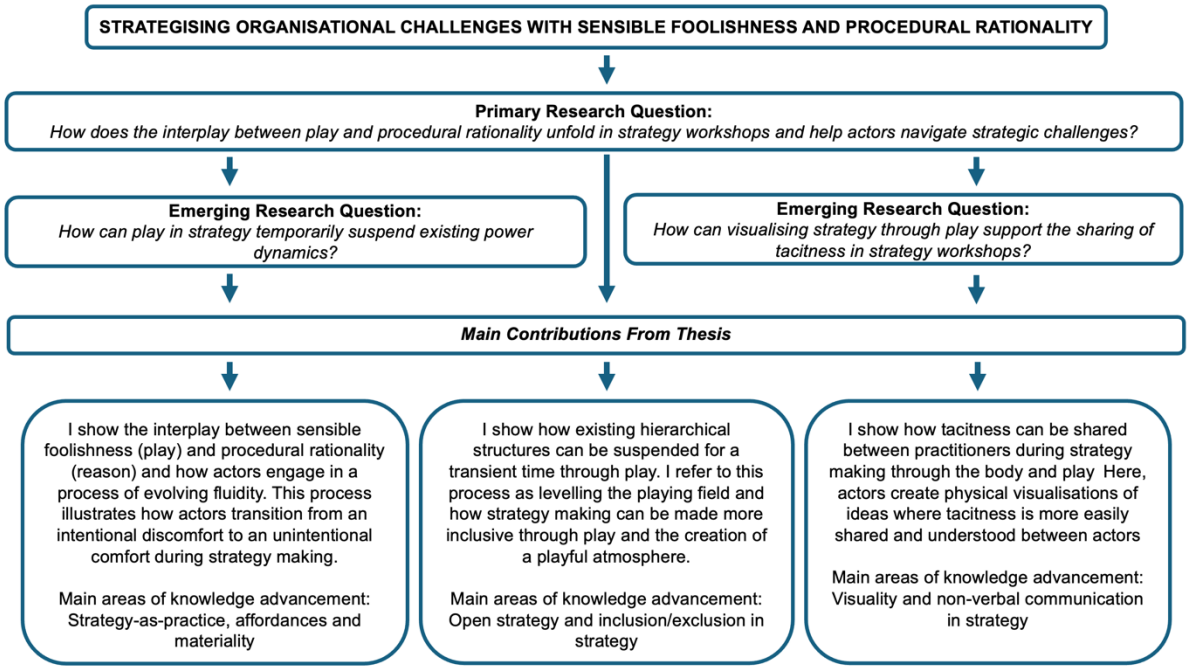
Second, the data set revealed how playfulness can temporarily suspend existing hierarchies to enable wider participation during strategy making (Chapter 5). The benefits that arise from greater participation thus depend on whether wider organisational members are truly being heard in strategy (Splitter et al., 2024). Analysis revealed how wider participation in strategic decision making can be achieved through material rather than the discursive competency of employees (Splitter et al., 2024) and how the recurrent process of levelling the playing field though reinforcing, flattening and considering provided organisational members with both the confidence to speak up and the attention from senior managers (Splitter et al., 2024; Stieger et al., 2012) during strategy making.

The final set of findings centred on how tacitness could be shared in the context of strategic episodes through physical visualisations that emerged from play (Chapter 6). Building on the

definition of tacit knowledge (Nonaka, 1991; Polanyi, 1958), tacitness encompasses tacit knowledge but also the ideas, thoughts and emotions that actors struggle to communicate with spoken or written words alone (Martin & Salomon, 2003). The findings from this chapter zoomed in on the role of the body, the materials and the non-discursive aspects of strategy work and how together, physical visualisations were created through mutual understanding. This chapter provided a mechanism for how tacitness can be shared through non-discursive means, which were captured through the video-recorded data.

The final chapter of this thesis will summarise the findings that have been presented in the previous three chapters and how these findings advance, challenge and extend our understanding of how strategy making sessions take place and the value that is engendered through the interplay between seriousness and playfulness during strategy work. Firstly, this chapter will begin by summarising each of the three main findings that emerged from the data set. Second, the theoretical and methodological contributions will be discussed. Namely, how this research contributes to and advances the research agenda for SAP as well as using video-ethnographic approaches to capture the fine details in which strategy making takes place. A summary-visual of the main research question and theoretical contributions can be found in figure 7.1. Third, the implications for practitioners will also be discussed. Fourth, I will consider the limitations of this research project as well as avenues for further study. Finally, this chapter will finish with concluding remarks.

Figure 7.1: Summary of the research question and main contributions



7.2 The interplay between play and reason in strategy making

The first question in this thesis asks: *How does the interplay between play and procedural rationality unfold in strategy workshops and help actors navigate strategic challenges?* The crux of this research question explores the paradox of addressing serious organisational challenges that could affect the survival of the organisation in question, with playful and (seemingly) purposeless interactions. To address the proposed research question, March's (1971) concept of sensible foolishness was pinpointed as a widely recognised though surprisingly underutilised concept with high promise for the future of SAP research. What underpins March's (1971) sensible foolishness is play, which can enable actors to escape their logic of reason and to focus on goal discovery rather than achieving pre-determined goals. The findings reveal how the interplay between play and reason resulted in unexpected tensions and personal revelations from the participants. In particular, analysis identified enabling (escaping and suspending) and constraining (returning and exploiting) forces that evolve in terms of their fluidity throughout each of the strategic episodes. Analysis revealed how this recursive interplay generates valuable process affordances (Burke & Wolf, 2021), offering empirical support for March's (1971) proposition that play is a valuable yet often overlooked instrument of intelligence.

This evolving fluidity that occurred within the strategy workshops is a result of the interplay between forces of practicing play and foolishness and practicing logic and reason. The competing forces of play and reason each encompass distinct process affordances. These process affordances draw specific attention to the “unfolding sociomaterial interactions” (Burke & Wolf, 2021, p. 363) rather than the more commonly studied phenomenon of the affordances of things (Burke & Wolf, 2021; Gibson, 1977). These sociomaterial interactions were fuelled by intentionally purposeless interactions, which provided the opportunity for these processes to arise. These seemingly purposeless interactions allowed physical interaction with materials to precede thought, which opened the realms of strategising where organisational actors cultivated more novel and interesting wants.

Even when play was visibly forced and uncomfortable, organisational actors uncovered suppressed points of view that surfaced through material interaction. Here, actors began to let their guard down as play started to break down the exterior shell of actors (Montagu, 1988). These revelations at times led to divergent opinions, which were then reconciled through play. Gradually, organisational actors became more relaxed and familiar with the materials and this was also evidenced by reduced facilitator intervention. This familiarity lends itself to increasing confidence in play, where actors demonstrated dynamic bodily movements, expressive facial looks and a more dynamic and variable tone of voice. Taken together, these observations represented signs of animation and liberation, where actors momentarily freed themselves from prevailing norms that dominated their workplace practices. Through feelings of liberation and freedom, actors began to appreciate different aspects of experience that came to light as a result of escaping traditional organisational practices. Through animation, actors projected themselves into the playing field and began to filter through ideas and unearth hidden gems that emerged from becoming physically and metaphorically part of the narrative they were telling. By allowing physical and playful action to guide rational thought, organisational actors cultivated more interesting wants and unlocked their creative potential by interacting with material props. This extends March’s (1971) articulation where apparently purposeless material interaction can generate new wants, desires and goals. Organisational actors then became hooked on a specific idea that captivated their interest, which was due to the novelty and appeal of the idea or because of the significance the idea had for the future of their business. The hook then pushed actors to regress back towards logical thinking as they grounded their new-found wants in reality and adopted practical thinking to determine an action plan of how they were going to translate their new desire into practice. The process

affordances of practicing play and foolishness, and practicing logic and reason thus presented themselves as different sides of the same coin, with each process battling enabling and constraining forces that both encouraged and constrained play.

Through the video-recorded data, the interplay between the two processes underwent an evolving fluidity throughout the course of the strategy episodes. The evolving fluidity comprised enabling and constraining forces for play and reason that began as distinctly separate entities before evolving into overlapping and intertwining entities as each strategy episode progressed. The enabling dynamics comprised escaping and suspending. In escaping their logic of reason, actors temporarily disregarded norms that curtailed the discovery of new dimensions in strategy. Over time, organisational actors gain familiarity and confidence with notion of purposeful purposelessness and doing before thinking, which invites imaginative exploration of previously unconsidered topics. These enabling forces were also mirrored with constraining forces of returning and exploiting, where actors reverted to prevailing norms and objective thinking in order to bring imaginative ideas back to reality where they were forced to confront harsh truths about the practicality and feasibility of their ideals.

The evolving fluidity between play and reason is thus a dynamic and interrelated process that does not occur in a linear fashion and comprised three phases. First, actors began with *deliberate interplay*, where moments of play were intentionally forced and encouraged by the facilitator. Here, actors displayed signs of uncertainty and the seemed unsure of what to do with the materials. There was also a feeling of reluctance, where acts seemed unwilling to interact with the toys. Gradually, actors began to experience a playful release where participants displayed visible signs of pleasure in a process of *dialectical interplay*. This phase sheds light on the stemming from the tension between the two forces and the struggle (Gottlieb, 1972) between undertaking play and reason. The video recordings showed increased signs of confidence as actors seemed more relaxed with materials and they displayed free-flowing bodily movements. Yet, actors were still observed returning to familiar practices as they deliberated how their newly cultivated wants could be grounded in reality. Over time, organisational members began to self-manage their oscillation between practices of play and reason during *dwelling interplay*. Here, participants responded intuitively and seamlessly to material and social cues as they oscillated between play and reason. Taken together, these three phases illustrate an increasingly comfortable interplay as the workshop progresses.

7.3 Temporarily suspending power dynamics

The second research question asks: *How can play in strategy temporarily suspend existing power dynamics?* The central pillar in this question explores the impact of play on existing hierarchies and how the act of purposeful purposelessness can level the playing field during strategising. This gradual process of increased playful encounters resulted in the blurring of hierarchical levels between the role of managing directors and employees, where the former became more open to non-managerial employees being evolved in strategy and the latter gained the confidence to contribute and participate in strategic debate. Findings revealed how the process of dissolving existing power dynamics encompassed three phases of creating a playing field (i.e. having a suitable environment), levelling the playing field (i.e. dissolving the hierarchy with play) and maintaining the playing field (i.e. considering whether power dynamics resumed after the strategy workshop).

Analysis showed that a supportive environment would need to be in place to enable hierarchies to be temporarily dismantled, which encompassed three criteria. First, as revealed from the post-interviews with organisational members, participants shared how being physically in a new environment helped ease them into temporarily abandoning their existing mindsets. Within their organisations, employees recognised the power and authority of their managers. However, outside their normal working spaces, these power dynamics were less entrenched as employees felt that they and their managers were both in a new environment, meaning they were physically separated from these hierarchical structures. A new physical space was therefore a central criterion to enable the suspension of power dynamics. Second, the team felt empowered as the materials gave power to their 'creators' as organisational actors had their views reinforced by their physical construction with the toys. Third, developing team spirit and a sense of community was significant for employees to recognise their views were valid and not inferior to managerial views. This helped reach sentiments of belonging and commitment (Hautz et al., 2017) from organisational actors.

Once the above foundational pillars were in place, the video-recorded data revealed how organisational actors underwent a process comprising three phases to temporarily suspend hierarchical norms. First, *reinforcing* occurred where organisational actors displayed signs of freely interacting with the materials and they began to assign meaning to the toys where each actor assigning different meanings. The materials presented themselves as a point of interest that invited discussion and further inquisition from managers, who would ask questions to employees and then reinforce employee meanings that were assigned to the toys. The stage

of reinforcement also coincided with empowering creators, as each organisational member presented their own understanding, interpretation and narrative with their chosen materials and completed construction. This was their own interpretation, which was supplemented by their materials and because of this, the views of organisational members were not so easily dismissed by managers.

Second, *flattening* occurred where managers displayed reduced signs of authoritative and directive behaviour and employees became more commanding of the direction of strategic debate. This was shown in the video-recordings where employees took the lead on sharing their narratives, which stemmed from their interaction with toys. Building on from this, employees would also use the materials to symbolise and share their personal grievances, which were acknowledged by managers. While the presentation of such grievances were not directly related to organisational strategy, they had a resounding impact on how strategy would be executed. Bringing these previously hidden topics to light thus allowed organisational actors to walk on thin ice and address sensitive topics that otherwise would have remained contained.

The final phase of *considering* occurred where the reinforcement and empowerment that had previously been evidenced from the workshop, became summarised in conclusive action plans as the workshop concluded. The video recorded data revealed how the views of wider employees were not only heard by managers but also legitimately considered as part of organisational strategy, as managers showed the intention to implement changes in the wider organisation by drawing on toys to illustrate their narratives.

The post-phase of data collection proved vital to explore whether the dissolution of power dynamics extended beyond the workshop and whether the ideas generated from employees were translated back into the organisation and to the wider team. The post-observations showed that the contributions from employees were successfully translated into organisational strategy, as managers communicated changes to the wider team in subsequent meetings. The influencing role within the wider organisation underlines the capacity of play to engender greater commitment from organisational actors in translating ideas from the workshop into strategy. However, the post-interviews showed that while employees shared that they felt more included in strategy during the workshop, they recognised this wouldn't extend beyond the workshop and the impact of play dissolving hierarchical structures was limited to the singular strategy workshop.

Hence, the findings from Chapter 5 delineate how strategy remains a typically exclusive activity (Whittington et al., 2011) but in escaping logic of reason, playfulness can provide non-managerial employees with the confidence to contribute in strategy, be heard and ultimately considered by managing directors. The process of levelling the playing field occurs in line with the oscillation between periods of play and reason. Over time, actors gain familiarity and confidence with the materials and engaging in playful behaviour. This increasing confidence in play is also reflected in increasing confidence to contribute to strategic debate using the materials as mediums to represent ideas. However, organisational actors are pulled back to logical thinking when grounding their newfound wants in reality. This underscores the temporal dimension of widening strategic inclusion through play as playfulness and foolishness contributes to the temporary suspension of prevailing norms, so as to bring in the views of wider organisational actors.

7.4 Sharing tacitness by visualising through play

The final research question asks: *How can visualising strategy through play support the sharing of tacitness in strategy workshops?* The purpose of this chapter was to bring focus back to the materials (Dameron et al., 2015) as non-verbal means of communication during strategy making where research generally continues to focus on spoken discourse and written text as means of communication (Balogun et al., 2014). Drawing on the concept of indwelling, that is "understanding by doing" (Jha, 2002, p. 72) and March's (1971) sensible foolishness, analysis revealed how actors used the toys and their bodies to create physical visualisations of their ideas stemming from play. I refer to this process as feeling and sensing strategy, where organisational members explore ideas to convey meanings, ideas and sensitive topics through a more hands-on approach in strategy (Bürgi et al., 2005; Whittington et al., 2006).

The video-recorded data illuminated three processes that stemmed from feeling and sensing strategy, which supported organisational actors in achieving greater meaning and understanding through the materials. First, clarifying material ideas occurs when the meaning of particular materials was understood across the wider team, without an explicit explanation. This draws attention to how materials can more readily communicate ideas than spoken words alone, due to the flexibility of interpretation of materials. Second, materialising emotions occurs when organisational actors bring to surface personal grievances, which they then support through a material representation. The use of the toys acts as a platform to emphasise their

feelings and to visually showcase their concerns. Third, seeing the stories of others occurs where organisational members used the materials to tell a visual story, which hooked the interest of other members and sparked debate.

Feeling and sensing strategy pointed highlighted how organisational actors used their bodies and the materials to convey ideas and guide the direction of strategic debate. The materials also supported actors in detaching themselves from their emotions as their sentiments were expressed through the materials and physical visualisations. Literally feeling their way through strategy supported organisational actors in sharing tacitness, which encompass those topics that are actors find difficulty in expressing using spoken or written discourse alone. These are topics that may be sensitive, contentious or thorny (Knight et al., 2018) and given their nature, these topics are rarely brought to surface in the context of strategy making.

The mechanism for sharing tacitness comprised three phases. First, *diverging perspectives* occurred as organisational actors revealed contrasting viewpoints. These viewpoints were expressed through physical visualisations that stemmed from playful material interactions. Altogether, the use of the physical visuals helped organisational members reach procedural justice, which relied less on language and more on actors expressing their ideas through the materials. Second, *bracketing focal topics* occurred were organisational actors recognised the urgency of tasks through minimalistic structures. The (at times) simplistic design of material landscapes offered a deeper understanding and helped to protect and recognise core issues. The simplicity offered by the materials also helped practitioners achieve greater clarity in pinpointing the most urgent challenges that demanded attention. Third, *resolving ambiguity* occurred through material and bodily involvement in strategy that drew on enhanced sensory immersion as a means to express and visualise different interpretations, which were readily understood by wider organisational members. The video-recorded data illuminated the central role of the body and materials and how non-verbal means of communication offered powerful means for actors to navigate through organisational uncertainty.

7.5 Theoretical contributions

The following section of this chapter will detail the theoretical contributions from the findings of this research. In particular, the theoretical contributions aim to advance and challenge existing knowledge surrounding how strategy work takes place and what constitutes strategic

practices. These are grounded in the findings that stem from the interplay between March's (1971) sensible foolishness and procedural rationality.

7.5.1 The evolving fluidity between play and reason

The first theoretical contribution from this research centres on the interplay between sensible foolishness and procedural rationality, how this interplay unfolds in practice and the associated value outcomes. This contribution is aligned with how practitioners actually do strategy work (Golsorkhi, Rouleau, Seidl, & Vaara, 2015; Jarzabkowski et al., 2022; Jarzabkowski & Spee, 2009; Prashantham & Healey, 2022). For instance, practice scholars highlight how organisational actors use and manipulate technologies of rationality (e.g. strategy tools), to serve their particular means, produce insights and achieve different value ends (Jarzabkowski & Kaplan, 2015). Practice literature has also theorised alternative logics to explain strategic action and success (Chia & Holt, 2009, 2023). Such studies draw attention to the 'dwelling' worldview (Chia & Holt, 2006) and the concept of wayfinding (Bouty et al., 2019). Hence, practice studies have already begun to question the dominant assumption that conscious and objective thought, predetermined goals and procedural rationality are the only drivers of effective action. In particular, Chia and Holt (2023) argue that pre-cognitive forms of strategic intention are valuable explanations of success in strategy. However, what remains still largely unanswered within practice scholarship is the critical interplay between play and reason (March, 1971, 1999).

In his seminal publication, March (1971) put forward sensible foolishness as a valuable and liberating mechanism to escape pre-existing rules, explore alternative possibilities and uncover more interesting wants. Central to sensible foolishness is play and for March, play is a necessary compliment to the pursuit of organisational intelligence (Ocasio et al., 2019). The concept of bringing play into strategy-making sessions has been explored in serious play studies, which have uncovered the beneficial outcomes from the combination of play and strategy work. For example, in their study Roos et al. (2004) find how shared meaning is constructed through actor engagement with Lego bricks. These serious play studies however remain limited and undertheorised as they lack attention on the unfolding sociomaterial dynamics between March's (1971) sensible foolishness and procedural rationality. Empirical studies within SAP have also neglected the process by which actors actually escape their logic of reason and use "play as an instrument of intelligence, not a substitute" (March, 1971, p. 259).

The first findings chapter speaks directly to this unknown within practice studies whereby this thesis has demonstrated the process of how organisational actors can escape their logic of reason and use play as an instrument of intelligence. This study offers a fine-grained understanding of how play and reason unfold during strategy-making sessions. The process of evolving fluidity comprises three interrelated phases that show how actors progress from intentional discomfort from engaging in play and reason and gradually evolve towards an unintentional comfort, where organisational members come to appreciate the value of different experiences i.e. doing for no immediate reason and experiencing joy in the face of challenges. Specifically, the characterisations of forced and uncomfortable interplay, emergent and joyful interplay, and fluid and instantaneous interplay show the complementarity between play and reason in the pursuit of organisational intelligence (Ocasio et al., 2019). While studies have praised March's work (Larsen, 2020) and the promise held by using sensible foolishness as a means to challenge the dominance of procedural rationality being a pre-condition for strategic success, empirical studies on the topic are rare. Moreover, I explore March's work at the individual level, which offers insight to the practice field of how organisational members actually escape their logic of reason during strategy making sessions.

Through a detailed analysis of sociomaterial interactions from video and audio-recorded episodes of actors engaging in a process of play and logical reasoning, I reveal how each practice produces unintended process affordances (Burke & Wolf, 2021; Gibson, 1977). Studies on affordances have a propensity to explore the affordances of things (Burke & Wolf, 2021) and our study continues to shed light on the affordances of processes, where activity affords activity (Gibson, 1977). For example, the process of cultivating newfound wants occurred as a result of purposeless interaction with materials and letting action precede thought. Cultivating newfound wants thus arose from this purposive action – conscious but non-deliberate (Bouty et al., 2019) – action. Hence, in line with purposive activity, this thesis finds that 'doing before thinking' and allowing 'action to precede thought' are complementary means to support the pursuit of organisational intelligence. This is important for SAP scholarship, given the widely acknowledged downfall of procedural rationality, especially in complex and ambiguous situations (March, 2006), which can blind managers to possibilities that are inconsistent with prevailing practices. Practices of doing before thinking, while deliberate and intentionally uncomfortable, give rise to the manifestation of unintended process affordances that contribute to an increasing comfort with alternate modes of strategising.

7.5.2 Levelling the playing field through reinforcing, flattening and considering

Second, this thesis has shown how playfulness can support the suspension of existing power dynamics for a transient time during strategy workshops. From existing studies within the field of open strategy, we already know how organisations can open-up strategy-making and to make the process more inclusive and the benefits that arise from doing so (e.g. Brielmaier & Friesl, 2023; Gegenhuber & Dobusch, 2017; Hautz et al., 2017; Whittington et al., 2011). More recent studies have tended to focus on the role of strategy discourse (e.g. Langenmayr et al., 2024) and how employees need to develop their competence in discourse in order to be heard by managers (Splitter et al., 2024). Hence, existing studies that consider how to achieve wider participation prioritise the benefits from organisations opening up their strategy-making sessions and how employees can be heard by managers. We know much less about the process by which this unfolds as open strategy itself is a process that organisations undertake rather than a goal for them to achieve (Whittington et al., 2011). In addition, the role of discourse and discursive capabilities also remains a dominant component within prevailing research (Balogun, Best, et al., 2015), with comparatively less attention being paid to the role of materiality.

Drawing on March's (1971) notion of temporarily suspending rational imperatives, I explored how playfulness could temporarily suspend existing hierarchical structures and allow organisational actors to take on different roles and identities (Bakhtin, 1981; Goffman, 1956) for a transient time during strategy workshops. Through the video-recorded data, I was able to capture the process how these power dynamics began to dissolve over the course of strategy making sessions as organisational members utilised the toys to physically represent their ideas, contributions and concerns. Given the ideas of employees had a lasting physical presence in the form of a tangible construction, these ideas were more readily supported and legitimately considered by managers. This underlined the significance of materials in how power dynamics could be temporarily suspended as materials provided a physical and lasting presence of ideas, in comparison to spoken words, which are more easily dismissed and forgotten.

Moreover, the data set comprised a pre-phase, a workshop phase and a post-phase, which provided me the opportunity to understand and investigate organisational power dynamics over a prolonged period of time. This enabled me unique access to compare how hierarchical

norms altered during the workshop and any resulting influence after the workshop had taken place. While findings revealed that established power dynamics resumed after the workshop had taken place, the ideas employees had contributed from the workshop were translated back into organisations and communicated to the wider team, as revealed in post-workshop observations. This adheres with existing studies that recognise prevailing hierarchies resume once participants return to their normal working practices (Johnson et al., 2010) . However, scholars have found that it is the very suspension of prevailing norms and practices that makes it difficult for findings to translate beyond workshops and back into organisations (MacIntosh et al., 2010).

The findings from this research challenge this view and I put forward that it is because of the temporary suspension of hierarchical norms that enables organisational actors to develop greater commitment (Quick & Feldman, 2011; Whittington et al., 2011). This is for two key reasons. First, developed ideas stem from playful (and enjoyable) interaction, which helps foster a shared understanding and given the pleasurable experiences, ideas are more readily retained. Second, the physical constructions that remained throughout the workshop became a point of reference, which organisational actors referred to throughout the session, thus embedding the ideas in the minds of actors. This is summarised in the phase of considering in the process of levelling the playing field, where contributions from employees are legitimately considered and translated into organisational strategy.

Taken together, the process of levelling the playing field showcases how hierarchical structures can be suspended for a transient time through the recurrent process of reinforcing flattening and considering. This also advances our understanding of how inclusion and participation in strategy can be achieved through playfulness and material interactions. These findings challenge the view that organisational actors need to develop competencies and abilities to be heard by managers. Instead, I propose how humour and play (Sturdy et al., 2006) can help practitioners detach from operational business in these workshops, to engender more inclusive strategy making.

7.5.3 A mechanism for sharing tacitness

The final significant theoretical contribution from this thesis aims to advance our understanding of how tacitness can be shared through physical visualisations arising from play. There is a broad literature surrounding the sharing of tacit knowledge and how such knowledge can be

transferred and shared between people (Eapen & Krishnan, 2019; Hadjimichael et al., 2024). Drawing on the definition of tacit knowledge (Hadjimichael et al., 2024; Nonaka, 1991; Polanyi, 1958), I refer to tacitness as any topic of focus (not specific to knowledge) that is difficult for humans to express and convey (Martin & Salomon, 2003) using spoken or written discourse alone. Tacitness thus extends to feelings, emotions and those prickly (Knight et al., 2018) and sensitive topics, which organisational actors may find challenging to bring to the attention of managers or wider team members. This framing of tacitness is grounded in the empirical data, where the strategy episodes showcased how organisational actors used the materials and their bodies (which became extensions of their immaterial ideas), to more easily communicate their ideas and feelings. These sentiments were also more readily understood, which participants reflected upon during their post-interviews. The mechanism for sharing tacitness is significant for two key reasons.

First, literature tends to focus on how tacit knowledge is shared and acquired between actors (e.g. Hadjimichael et al., 2024; Pyrko et al., 2017), with less attention being paid to the sharing of feelings and emotions within organisational contexts, which actors may find difficulty in bringing to the forefront of strategy meetings. Organisational actors, particularly non-managerial employees, may feel uncomfortable and lack confidence to share sensitive, delicate or thorny topics (Knight et al., 2018) using spoken words alone. These topics are not always considered 'strategic' however, these suppressed sentiments proved to have an impact on team dynamics and ultimately organisational strategy. The physical visualisations that emerged from playful interaction with toys alongside involvement of the body (Gylfe, Franck, Lebaron, & Mantere, 2016) therefore offers an alternate means for actors to convey meanings and understandings (Paroutis et al., 2015). Thus, the findings from chapter 6 extend our understanding of how tacitness can be shared, communicated and understood by zooming in on physical visuals arising from playfulness. By playfully constructing material landscapes and seeing strategic issues in the flesh (Heracleous & Jacobs, 2008), organisational actors raised potentially sensitive topics (supported by their physical construction), during strategy workshops that proved challenging to convey with dialogue (Bell & Davison, 2013) and objective reasoning.

Second, findings advance our understanding of visuals in strategy (Paroutis et al., 2015), particularly physical visuals arising from playful interaction with materials. While practitioners regularly draw upon a range of visuals (e.g. PowerPoint slides and common strategy tools such as SWOT) when engaging in strategy making (Kaplan, 2011; Knight et al., 2018), these

studies have tended to focus on the logical and rational application of these visuals alongside what actors say about them (Balogun et al., 2014). With some exceptions (e.g. Heracleous & Jacobs, 2008), physical visuals created from play by organisational actors in the context of strategy making remains largely an underexplored area. The sharing of tacitness illustrates how the physical and playful nature of the visuals stimulates conversation as the direction of strategy debate progresses in line with the creation of these visuals and what actors actually saw (Knight et al., 2018).

7.6 Methodological contributions

This research has two key methodological contributions. First, it advances the role of video-ethnography to capture the sociomaterial dynamics (Gylfe et al., 2016) that unfold during strategy making which can only be efficiently captured through fine-grained analysis of recorded data (Jarrett & Liu, 2016). The unfolding of material use (and playing with materials) is hard to capture with interviews and is difficult to fully explain in words alone (Kohtamäki et al., 2022), thus requiring the need for video ethnography. While the concept of video-recorded data as a form of ethnographic research is not a new phenomenon (e.g. Heracleous & Jacobs, 2008; Jarzabkowski et al., 2015; Paroutis et al., 2015; Smets et al., 2014), such studies remain rare and there has been a call for more practice research to adopt video-recorded data as a research tool (Dameron et al., 2015).

There is a tendency for researchers to rely on recollections and retrospective accounts of participants (Dameron et al., 2015), which are unable to capture the small and detailed interactions of actors and their associated facial expressions, body positions, spatial arrangements and other non-verbal cues (Smets et al., 2014). Video-recordings puts the human body (Dameron et al., 2015) and materials at the forefront of strategy and while the discursive element of strategy work remains important, attention shifts towards the material in video-data. In particular, this research explores the interplay between play and reason during strategy-making and how this unfolds over time. The video-recordings proved to be an essential tool to closely examine the small bodily gestures, for example, tweaking the angle of materials on the table, tone and speed of voice, where organisational actors were looking and at what time. Altogether, this research attempts to show how the sociomaterial interactions and manifestations arising from the interplay between play and reason, can be effectively captured and analysed through video-recorded data, which up until now, has remained mostly absent in research that draws on video-ethnography.

Second, this research illustrates the capacity of video-ethnographic data to capture multimodal strategising that occurs across the verbal, visual and kinaesthetic modes (Bürgi & Roos, 2003). Without video recordings, it would be near impossible to study these micro-behaviours and micro-interactions (Jarrett & Liu, 2016) across different strategising modes. Moreover, video recordings enabled a real-time account of how process unfold over time and the videos also allowed me to re-analyse (Jarrett & Liu, 2016) the bodily, material and discursive interactions and to explore these in fine detail (Jarzabkowski et al., 2015). The nature of the data set comprising a pre-phase, workshop-phase and post-phase also supported analysis of organisational processes. The video-recordings from the workshop phase provide a novel approach to studying how process affordances (Burke & Wolf, 2021; Gibson, 1977) and behaviour unfold as a result of actor-material manifestations (Demir, 2015). This continues to be a promising avenue for future research that explores unfolding process affordances in various contexts.

7.7 Practical implications

This section will offer practical implications based on the empirical findings from this research. First, previous serious play studies have tended to emphasise the practical benefits for practitioners engaging in play during strategy-making sessions (e.g. Heracleous & Jacobs, 2008; Roos et al., 2004; Statler et al., 2011; Statler et al., 2008). While these outcomes are important, the findings from this thesis showing the evolving fluidity between play and reason, showcase show the value from engaging in the process of oscillating between play and reason. This is important for organisational actors who begin to recognise the significance of reaching greater understanding and commitment that occur during the interplay between play and reason rather than solely on the strategic actions and goals arising from the process.

In particular, the evolving fluidity spotlights how value for organisational actors does not solely relate to the ideas and goals that come from play. Value can also relate to the changing interactions and receptivity to different lines of thinking during the interplay between play and reason. Recognising that value from strategy making does not need to always manifest in terms of goals and outputs is significant for organisational actors. In experiencing the worth from play, organisational actors were equipped to implement their own playful practices when facing future organisational challenges.

Second, due to prevailing hierarchical structures (Hardy & Clegg, 1996) within organisations, employees may lack the confidence to speak up and raise concerns in the presence of managers (Stieger et al., 2012). However, by engaging in playfulness, organisational actors begin to gain confidence as they use the materials to represent and support their ideas. Bringing play into strategy-making sessions thus supports employees (and non-managerial employees in particular) in sharing their ideas, concerns and feelings. Feeling more able to bring these topics to surface through play can help boost team dynamics and foster greater commitment among organisational members (Hautz et al., 2017).

Third, given that the workshop was intended to be fun and to take actors away from their 'working-mindsets' another practical benefit relates directly to the pleasure actors experienced from the workshop. The pre-observation phase of data collection often showed actors (at times) appearing a little disinterested and distracted during meetings. By contrast, the participants during the workshop showcased visible signs of immersion and enjoyment that help facilitate team bonding and connections. For example, having the shared experience of playing during strategy making created collective memories and supported relationship building, that otherwise would not have occurred during encounters in the office-space. The playful and hands-on nature of the strategy workshop also helped to trigger fresh ideas that stemmed from new stimuli and the toys actors were provided with. Taken together, the sentiment of joy stemming from the strategy workshop proved to be a benefit in itself as organisational actors shared their positive memories from the activity and how they felt feelings of "nostalgia" and "like, being a child" during the workshop.

7.8 Research limitations and directions for future research

I will now discuss the research limitations and avenues for future research. First, this research was conducted in the context of SMEs and while this offered research advantages such as the nature of their organisational challenges, the number of employees within the organisation affected the generalisability of findings (Langley, 1999). There were limited research participants present during the strategy episode (between two and four participants) and the attendees at the workshop were the core team members of the organisations. While multiple cases were used as part of this research (Eisenhardt & Graebner, 2007), conducting this research solely in the context of SMEs presented a research limitation as the nature and dynamics of strategy making would differ in the context of larger organisations. Findings from

this research project were grounded in the context of SMEs and so generalisability to larger organisations may be limited.

Therefore, one avenue for further research could explore how sensible foolishness and procedural rationality unfold in different contexts. The thesis has provided a process model for how play and reason evolve over the course of strategy-making sessions in the context of SMEs, who consider themselves as newly formed organisations. For instance, reinsurance trading could be a novel context to conduct video-ethnographic research to explore how sensible foolishness and procedural rationality unfold in the process of insuring insurance companies (Smets et al., 2012). Sectors such as reinsurance have institutionalised practices, which have occurred across centuries (Smets et al., 2012) and so how play unfolds in these sectors will likely follow a different evolutionary path. Research in these contexts could also begin to delve deeper into the dark side to play, which has remained largely unexplored in this research and in what situations does sensible foolishness became harmful for organisational strategy? How would this negativity manifest and how could it be prevented?

Second, due to the availability of research participants, the strategy episodes lasted for either three or four hours. While the video-recorded episodes provided a valuable data source to closely analyse the micro-interactions (Johnson et al., 2007) between the body and the material during strategy making, the duration of the strategy-episodes presented a limitation. A longer strategy-making session for the duration of one day to two days (e.g. Roos et al., 2004) could have provided greater scope for trends and themes to emerge from the data. Alternatively, further strategy-episodes of similar length could have also been valuable as these supplementary episodes could have offered further insight into whether the unintentional comfort from the evolving interplay between play and reason sustained in further strategy-making sessions and whether strategic inclusion that was previously reached in the strategy workshops would need to be re-built in further workshops.

Hence, future studies could conduct a series of video-recorded workshops within the same organisation. The study of the interplay between sensible foolishness and procedural rationality across multiple workshops could offer valuable insights into how the process manifests when repeated and resulting impact on organisational operations (Seidl & Guerard, 2015). Indeed, this study explored the interplay across three organisations, each of which entered into a singular workshop. Further studies could explore how the process unfolds within a singular organisation across multiple workshops.

Third, given the hands-on nature of the strategy-episodes, this research required organisational actors to be located in proximity so that they could physically be present and attend the strategy episode. This presented another research limitation as organisations are increasingly adopting hybrid working patterns (Kohtamäki et al., 2022) and organisational members are not required to be located in proximity for strategy-making to take place in person. Strategy-work has seen a shift to a virtual environment, which has been propelled by the COVID crisis of 2020-2021 (Kohtamäki et al., 2022). Such hybrid working patterns were omitted as part of the research design, which is a further limitation of this research.

Another avenue for further research could adopt a research design that accommodates for hybrid and digital working patterns in the context of exploring the interplay between play and reason in strategy-making sessions. The use of video technologies such as Zoom and Microsoft Teams have been identified as a powerful opportunity to explore the importance of sociomaterial and embodiment in virtual worlds (Kohtamäki et al., 2022). Moreover, virtual technologies have been identified as a fruitful manifestation of technologies of foolishness (Dodgson, Gann, & Phillips, 2013) and the exploration of the interplay between play and reason through virtual technologies would be an interesting avenue for future study.

7.9 Conclusion

To conclude, technologies of rationality have been designed to help and offer guidance to managers when faced with complexity and high-stakes decisions that can impact organisational survival. However, the efficacy of these tools have long been called into question and so this research brings March's (1971) technologies of foolishness to the heart of strategy making and as a potential solution and promising avenue for future research within the SAP field. In line with March's initial proposition, instruments of technologies of foolishness, such as sensible foolishness (i.e. play), have been identified as a valuable proponent of organisational intelligence and an important complementor to procedural rationality. While March's work on sensible foolishness has received praise from scholars, his concept has not been adequately and empirically explored in the context of strategy-making practices. This thesis finds how play and reason unfold over the course of strategy-making sessions and the unintended sociomaterial manifestations that arise from their interplay between the two opposing though complementary forces. Findings also illuminate how play can influence strategic inclusion in strategy and give voice to wider organisational actors and offer a means

of communication for those topics that actors struggle to communicate with words alone. In the words of March (1971, p. 262) “we need to find some ways of helping individuals and organizations to experiment with doing things for which they have no good reason, to be playful.” This thesis answers March’s call to bring to surface the value of play and its role to complement rather than supplant, serious strategising.

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Appendices

Appendix 1: Advertising flyer

UNIQUE OPPORTUNITY TO PARTICIPATE IN A CUTTING EDGE RESEARCH STUDY

Research Team:
Miss Rebecca Lu, Dr Gary Burke, Dr Omid Omidvar & Dr Igor Pyrko

Research aim:
To understand how creativity can be used in strategy to help participants tackle serious and complex challenges.

Importance of this research:
Poverty, the refugee crisis, climate change, the financial crisis and COVID-19 are just some examples of the challenges we must all contend with, in some form or another. Yet, despite urgency of these challenges there is no clear solution. Traditional approaches need to evolve in order to manage and tackle these challenges. The primary focus of this research is to therefore explore how strategy tools and materials can be used in novel ways to stimulate creativity in the strategizing process when faced with complexity and uncertainty.

Outcomes for participating in this study:
- Receive a bespoke workshop for your organization
- Be provided with a tailored 'toolkit' to manage future challenges
- Obtain regular feedback on how current operations may be improved
- Receive support from expert academics and researchers
- Learn about creative ways to strategize and grow

Please email lur2@aston.ac.uk to express your interest in this study

AACSB ACCREDITED EQUIS ACCREDITED ASSOCIATION OF MBAS ACCREDITED UNIVERSITY OF THE YEAR 2020 TEF Gold Teaching Excellence Framework

Appendix 2: Set-up of the room where the strategy workshops took place

Appendix 3: Example questions for pre-interview

General background questions

Can you tell me a bit more about your position in X?

How would you describe the managerial/leadership style at X?

In your opinion, do the X team feel empowered?

Strategy related questions

How involved are you in X's strategy?

Would you like to be more/less involved or happy with current involvement level?

How often do you discuss strategy at X?

(To the best of your knowledge) How does X learn about strategy?

Do you think the role of rooms / space influences strategy?

What is X's strategy?

For your position in X, do you use any tools? (E.g. SWOT)

Are these tools used in the strategy process at X?

What do you think is effective about X's strategy development process?

What do you think could be improved in X's strategy development process?

Do you think X's strategy is understood throughout the organisation?

Creativity/play questions

What level of importance do you think creativity has within the X team?

Do you think there is a need to be more/less creative? Why?

Future of X

In your opinion, what do you think is a short term and long-term challenge for X?

Appendix 4: Example questions for post-interview

What were your immediate reflections of the strategic play workshop, please?

What are your thoughts on the role of play in terms of communication within the team?

Do you think the use of toys like Lego and Play Doh, encouraged you to think and/or behave in a different way? Why or why not?

Do you think play helped overcome hierarchies that were previously in place (if they were in place)? Why or why not?

What did you find helpful about the use of play to tackle organisational challenges?

Did you find it easy or a little tricky to get into the activity of play, such as building constructions?

What were your thoughts on the materials themselves? The Lego, animals, building blocks, Play Doh. Do you think these encouraged a playful atmosphere?

Do you think being in a different location outside your office space encouraged you to behave or act differently? Why or why not?

What is your opinion on creating a story and using metaphors to express your thoughts?

Do you think the discussion of the workshop was more novel due to the use of play materials, compared to if you were using more conventional methods, such as mind maps?

How do you think this play workshop as a whole, compares to traditional meetings you've had in addressing challenges in the business?

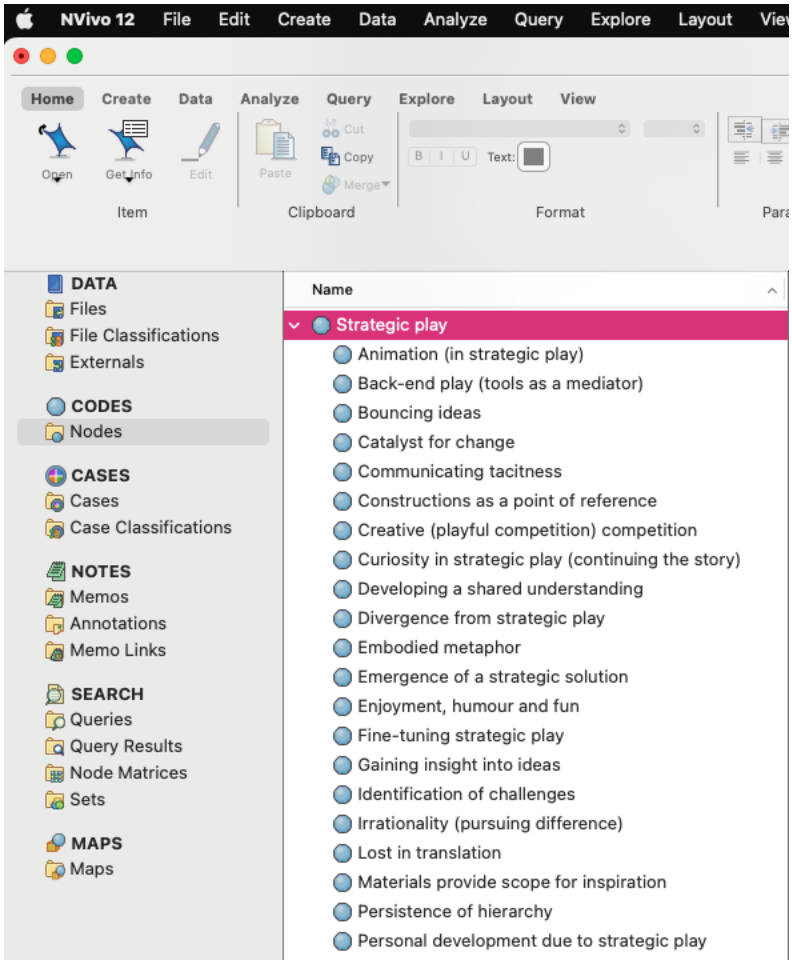
Appendix 5: Example field note

[redacted] Meeting
Time: 10:00-11:00
Location: [redacted]

Attendees:
[redacted] (via MS Teams)
Rebecca Lu

- Oli says hi to me and brings me into the meeting room. Daemon is already in the meeting room and we have a quick chat about how our mornings have been.
- Daemon informs Oli that Mila will be joining online today because she is not feeling well so she is working from home.
- Daemon is sat on one side of the table and Oli takes a seat at the head of the table. I quickly choose a seat and sit opposite Daemon.
- Daemon brings open his laptop and tells us he is going to set up the screen so that we can see Mila on the screen as she joins via MS Teams.
- When Mila joins, the team say hi and ask how Mila is feeling.
- Daemon then sets out the agenda for the meeting.
- He outlines what is to be discussed at the meeting: grants, business and project leads.
- He asks Oli and Mila to share their updates regarding their business leads.
- Oli starts and explains his progress. He also says that he is not hearing back from some of the leads
- It seems the team are reaching out to businesses to sign up for their programme but often do not hear a response. They seem to often chase these businesses.
- Oli suggests to be more specific to what they are proposing and how they can support entrepreneurs.
- Daemon nods and says this is a good idea. He then looks to the screen at Mila and says that they should all do this from now on.
- In this meeting, Mila seems to be contributing a bit less compared to Oli and Daemon. Perhaps because she is joining online this time.
- Throughout this meeting, Daemon seems to be steering the direction of conversation.
- After Mila and Oli have provided their updates, Daemon then moves onto addressing “priorities now” which relate to Blueberry’s short term strategy.
- Daemon emphasises how they all need to be “proactive in chasing funds”
- As part of their meetings, they use their laptops and a projector screen but no other tools or materials are used
- Usually participants are looking at their screens rather than at each other. Even when Oli and Daemon are talking to each other, they still look at their screens.
- Throughout the meeting, Daemon, Oli and Mila have serious-looking expressions. There is no engagement in casual banter or friendly chit-chat.
- The team didn’t even really smile at each other when seeing each other. Their interactions appear to be very formal.

Appendix 6: Example of initial open-coding on Nvivo



Appendix 7: PIS

Tackling Serious and Complex Challenges with Creative Strategizing
(V2 19.10.2022)

Invitation

We would like to invite you to take part in a research study.

Before you decide if you would like to participate, take time to read the following information carefully and, if you wish, discuss it with others such as your family, friends or colleagues.

Please ask a member of the research team, whose contact details can be found at the end of this information sheet, if there is anything that is not clear or if you would like more information before you make your decision.

What is the purpose of the study?

To understand how creativity can be used in strategy to help practitioners tackle serious and complex challenges.

Why have I been chosen?

You are being invited to take part in this study because:

You may be facing a strategic issue, which cannot be solved with generic tools and materials. You may also be facing a strategic block as a result of COVID-19 or other grand challenges or wicked problems. Or you may be seeking to develop a new strategic pathway to lead to monetary and growth benefits in your business.

What will happen to me if I take part?

You will be invited to participate in a tailored workshop, which will take place at Conference Aston, Aston Business School. During this workshop, you will learn about divergent strategizing and its importance and significance in the current business climate. During the workshop you will receive support from expert academics and researchers and have the opportunity to ask questions as well.

Alongside the workshop, a member of the research team will observe your strategizing meetings. A member of the research team will also interview you for approximately 60 minutes. The interview will be conducted at a time and place that is convenient for you (e.g. on a virtual platform or at work). With your permission, we will audio-record the interview and take notes to capture details. During the interview, you will be asked questions about your experience in the divergent strategizing workshop and how this has impacted your strategic outcomes.

You are, of course, free not to answer any questions without providing a reason. At the end of the interview, we will also ask if you can put us in touch with any other potentially interested participants, and we will ask if we can contact you in future for questions. After the interview, the recording will be transcribed i.e. typed into a Word document by an approved Aston University transcriber. Once the interview is concluded, you have two weeks to withdraw your information. This process will involve removing any information which could be used to identify you e.g. your name, location. Once the interview has been transcribed,

the recording will be destroyed. Anything you tell us that is included in the reporting of the study will be anonymised.

Do I have to take part?

No. It is up to you to decide whether or not you wish to take part.

If you do decide to participate, you will be asked to sign and date a consent form. You would still be free to withdraw from the study at any time without giving a reason.

Will my taking part in this study be kept confidential?

Yes. A code will be attached to all the data you provide to maintain confidentiality.

Your personal data (name and contact details) will only be used if the researchers need to contact you to arrange study visits or collect data by phone. Analysis of your data will be undertaken using coded data.

The data we collect will be stored in a secure document store (paper records) or electronically on a secure encrypted mobile device, password protected computer server or secure cloud storage device.

What are the possible benefits of taking part?

- Receive a bespoke workshop for your organization
- Be provided with a tailored 'toolkit' to manage future challenges
- Obtain regular feedback on how current operations may be improved
- Receive support from expert academics and researchers
- Learn about creative ways to strategize and grow

What are the possible risks and burdens of taking part?

No risks relating to participant physical or mental health is expected.

What will happen to the results of the study?

The results of this study may be published in scientific journals and/or presented at conferences. If the results of the study are published, your identity will remain confidential.

A lay summary of the results of the study will be available for participants when the study has been completed and the researchers will ask if you would like to receive a copy.

Expenses and payments

No expenses or payments are involved.

Who is organising this study and acting as data controller for the study?

Aston University is organising this study and acting as data controller for the study. You can find out more about how we use your information in Appendix A.

Who has reviewed the study?

This study was given a favorable ethical opinion by the *ABS* Research Ethics Committee.

What if I have a concern about my participation in the study?

If you have any concerns about your participation in this study, please speak to the research team and they will do their best to answer your questions. Contact details can be found at the end of this information sheet.

If the research team are unable to address your concerns or you wish to make a complaint about how the study is being conducted you should contact the Aston University Research Integrity Office at research_governance@aston.ac.uk or telephone 0121 204 3000.

Research Team

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Thank you for taking time to read this information sheet. If you have any questions regarding the study please don't hesitate to ask one of the research team.

Aston University takes its obligations under data and privacy law seriously and complies with the Data Protection Act 2018 (“DPA”) and the General Data Protection Regulation (EU) 2016/679 as retained in UK law by the Data Protection, Privacy and Electronic Communications (Amendments etc) (EU Exit) Regulations 2019 (“the UK GDPR”).
Aston University is the sponsor for this study based in the United Kingdom. We will be using information from you in order to undertake this study. Aston University will process your personal data in order to register you as a participant and to manage your participation in the study. It will process your personal data on the grounds that it is necessary for the performance of a task carried out in the public interest (GDPR Article 6(1)(e). Aston University may process special categories of data about you which includes details about your health. Aston University will process this data on the grounds that it is necessary for statistical or research purposes (GDPR Article 9(2)(j)). Aston University will keep identifiable information about you for 6 years after the study has finished.
Your rights to access, change or move your information are limited, as we need to manage your information in specific ways in order for the research to be reliable and accurate. If you withdraw from the study, we will keep the information about you that we have already obtained. To safeguard your rights, we will use the minimum personally identifiable information possible.
You can find out more about how we use your information at https://www.aston.ac.uk/about/statutes-ordinances-regulations/publication-scheme/policies-regulations/data-protection or by contacting our Data Protection Officer at dp_officer@aston.ac.uk.
If you wish to raise a complaint on how we have handled your personal data, you can contact our Data Protection Officer who will investigate the matter. If you are not satisfied with our response or believe we are processing your personal data in a way that is not lawful you can complain to the Information Commissioner’s Office (ICO).

Appendix 8: PCF

Tackling Serious and Complex Challenges with Creative Strategizing

Name of Chief Investigator: Rebecca Lu

Please initial boxes

1.	I confirm that I have read and understand the Participant Information Sheet (V2 19.10.2022) for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.	
2.	I understand that my participation is voluntary and that I am free to withdraw at any time, without giving any reason and without my legal rights being affected.	
3.	I agree to my personal data and data relating to me collected during the study being processed as described in the Participant Information Sheet.	
4.	I understand that if during the study I tell the research team something that causes them to have concerns in relation to my health and/or welfare they may need to breach my confidentiality.	
5.	I agree to participate in the workshop	
6.	I agree to the workshop being recorded and to anonymised direct quotes from me being used in publications resulting from the study.	
7.	I agree for a member of the research team to observe strategy meetings taking place at my organization (or virtually on an online platform such as MS Teams)	
8.	I agree to be interviewed at a time and place of my choosing. (Interviews can be virtual)	
9.	I agree for my interview being audio recorded and to anonymised direct quotes from me being used in publications resulting from the study.	
10.	I agree to take part in this study.	

Name of participant	Date	Signature
Name of person receiving consent	Date	Signature