

# Beyond Strategy: Leadership, Futures and Ethics in a Complex World

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## Overview

The basic premise of the "Beyond Strategy" approach is that in business we put up fantasy measures that we call business planning, such as budget planning and strategic planning, which Stacey<sup>1</sup> claims is a political process, primarily as social defences against anxiety. This distorts what we are actually doing and distracts us from the actual direct experiences we are having of each other as what happens through conversation.

Another premise is that the most important things we do can't be measured. These are open ended conversations around identity of "who are we?" or "What are we doing together?" This is the actual strategy we are involved in and is emergent strategy where we are endlessly searching for enough agreement to take the next steps. The next steps are iterative temporal processes, which are basic patterns of interactions moving recursively through time, of what we are doing together.

"Beyond Strategy"<sup>2</sup> can be described as "Leadership, Futures and Ethics in a Complex World". Leadership because ultimately this is where courage and will resonates, Futures because of its epistemic challenges and Ethics because we are here talking about moral philosophy and its consequences on organisations and individuals. Complex, but not necessarily complicated, because complexity, by its very nature, is the consequence of human existence and behaviour experienced in the world.

## Argument for "Beyond Strategy" Thinking

Given the plethora of courses, models, tools and leadership techniques available to enhance organisational effectiveness one could be forgiven in thinking that if you invested in these the successful operation of an organisation would be relatively easy.

If you employ people with the "right" skills and capabilities, get "buy-in" from them through vision, mission, value statements, and with the creation of the "right" culture and provide leadership skills accompanied by "feedback" in the form of direct and anonymous feedback then you have all the hallmarks for a successful organisation that will achieve "alignment" culminating in financial and organisational success. This is the argument that supports the notion that education is still based on the mechanistic Newtonian worldview and Fordist model of the "factory".

This said, from my observation, there are very few organisations today that don't do any, if not all of the above, but still fail to achieve the outcomes expected.

The "Beyond Strategy" approach argues for a more appropriate framework from which to implement a more meaningful educational methodology, to address the "strategy tragedy"<sup>3</sup> by using applied futures thinking beyond strategy. It is for this reason that this paper is meant to be more of a conversation piece about the possible linkages between "Beyond Strategy" thinking and group dynamics as a leadership methodology and

as an introductory exploration of this thinking rather than a claim to any "great" breakthrough.

### Foundations for "Beyond Strategy" Thinking

In taking the journey to understand the search for individual and collective meaning, there is a link with the emerging discipline of futures studies<sup>4</sup> as it infers that leadership needs to be connected to ethics and futures in a complex world from which we seek answers to our constant search for identity.

"Beyond Strategy" is the distinction between formulation and implementation where we write narratives about what we/you/me are actually doing. Implementation requires asking questions such as "What do you think is actually happening?" What is actually happening is always an interpretation. This is where the power of reflection is critical.

The "Beyond Strategy" approach differs from normal business planning in that it does not purport to minimalism of the underlying anxieties that underpins the disconnects between thinking and action that normal planning often does. For example double-loop learning creates anxiety as it often takes people to a place where their existing learning paradigm is challenged. The anxiety more often than not leads to denial and hence no changes are made. The "Beyond Strategy" approach pays attention to unresolved tensions or conflicts that are prevalent in any human dimension but more so in an organisational setting where power relations and non-rational behaviour is present in both overt (hierarchical and vested interests) and covert (fear of failure and embarrassment) ways.<sup>5</sup> In this sense "Beyond Strategy" takes a deconstructionist approach where it seeks enquiry into the blindspots and contradictions as its critical spirit through the process of identity formulation. The process of identity formulation comes from the process of communication, the process of power relating and the process of choices individuals make or do not make that have to do with values. The anxiety created can by this process become one of creativity rather

than denial and resistance.

Where the "Beyond Strategy" approach comes in conflict with the Newtonian-Fordist industrial structure, but also where its richness lies, is in the conversations that are centred on identity, meaning and purpose. This is the search for individual and collective meaning where difficulties arise between the forces of togetherness (the individual and the organisation), which subdues anxiety to maintain the balance, and the forces of separateness (the individual from the organisation) where anxiety increases which plays out in the current organisational model and, as a result, amorality grows as "winning" is all that counts.

The problem is differentiation between project and authority which means that it is the political system that is the problem. The project is a political activity - it is the continual negotiation of what to do next. When we are engaged in planning it is important to recognise that the purpose of the plan/process is as an important tool in the legitimisation of the political process of the team for its organisational purpose. In this sense it is both the individual and the team that are in fact the "project".

The current concept of the recognition of the function of organisational ideology is to sustain current power relations and to make them feel natural. However, this is also the mechanism that is used to sustain racism, sexism, genderism etc, and creates "in-groups" and "out-groups" where the "out-groups" come to think of themselves as inferior. This is an important dynamic of inclusion and exclusion and of identity formulation ("I" identity and "We" identity), the aspect of who you are depends on the group you belong to. Groups are then locked into unconscious dynamics which they have all created. What I am suggesting is that by using futures methodologies, such as Inayatullah's Causal Layered Analysis the "Beyond Strategy" process becomes an ideal vehicle for this methodology as it recognises that the organisation is an abstraction, it doesn't exist. All that exists are people and changing the conversations (the myths and metaphor level) is the same as changing the organisation (the world-view level) and through that to create trans-

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parency around agreed and not agreed definitions of reality (the social causes level) to create the "new" organisation (or the new litany).

The skill is to be able to continually negotiate with the source of power (money etc) to be able to carry on. The strategy is what is emerging in that interaction of which the *action* is the strategy of what we are actually doing. Beyond Strategy is achieved through the process of figure 1.

Beyond Strategy is therefore the emergence and formation of identity (individual, groups, collective) to explore purpose, asking questions such as:

- Who am I and what do I think I am doing?
- Who are we and what do we think we are doing?
- How have we come to be what we are now?
- What is my purpose?
- How will we come to be what we want to be?

**Facilitative Methodology**

The way we facilitate "Beyond Strategy" is by being conscious of the process of the way that our interactions are patterns that have evolved through our conversations. From these conversations purpose emerges in what we are doing during the nature of our ordinary and

everyday observations and conversations of what we think is actually happening. That is recognition of what the wider social patterns are that we are taking up in our interactions and, as the facilitator, get people to focus on their micro interactions. We can then encourage detailed narratives to uncover the reactions that are going on within our wider social actions. What then is going to happen comes about through the many choices we make, or choose not to make, of interacting.

Micro-interactions are our sensing of the shifts of the patterns during the conversation process and that these shifts are self-organising. Self-organising is the patterning of human interaction caused through our associative responses such as when we use turn taking sequences in our conversations and when we are mirroring what we think is happening using both rhetorical devices and "unconscious processes".

This can be anxiety provoking as no one is in control of these conversations and as such can arouse fears of losing control particularly if you are in a leadership or management role, and complexity is when these interactions pattern themselves producing further interactions which are themes and it is through these themes that storytelling in organisations comes about. The facilitative methodology is in the language and meaning we associate with these stories both as narratives and as the creation of knowledge. In this sense the facilitator

Communication	Power	Choices to do with values
Conversation Complex Responsive Processes – gesture and response Meaning Attribution, Purpose Identity (“I”/“We”) <ul style="list-style-type: none"> <li>▪ Individual</li> <li>▪ Groups (inside/outside)</li> <li>▪ Collective (inside/outside)</li> </ul>	Who has the resources/means? ↑ Politics (“I”/“We”)	Identity Formulation <ul style="list-style-type: none"> <li>▪ Who am I?</li> <li>▪ How did I become who I am?</li> <li>▪ What am I doing?</li> <li>▪ Who are we?</li> <li>▪ How did we become who we are?</li> <li>▪ What are we doing?</li> </ul> Legitimation Social defences against anxiety Tools-diagnosis

Figure 1

becomes part of the "performance" playing a part in the evolution of the unfolding events. In fact this is a process of social constructionism and intersubjectivity theory and is the link between complexity and phenomenology.

Phenomenologists argue that this is a process of our interpretation of what is reality and that what reality is, is this process we are involved in. The link to complexity theory is based on the relevance to change and emergence in the evolution of the organisation through the construction of ordinary everyday reality. "Beyond Strategy" is the facilitation of free flowing fruitful conversations that recreates the constraining themes, norms and values of a group's identity and at the same time allows for emergence of difference and innovative change.

The facilitative methodology of "Beyond Strategy" means taking our own and others experiences (themes) seriously by focusing on our own and others actual experience currently in an organisation. The methodology is unashamedly subjective. There is no attempt of any notion of objectivity because when talking about social phenomenon there is no such thing as objectivity.

What we need to be conscious of, as facilitators, is how does an ideology emerge in the interactions between us, the facilitator and the group as well as the group with the group, and what is the process for this, as often the facilitator may not have an identity with the group. The methodology includes writing a reflective narrative (reflective journal) of what the group is currently engaged in and getting them to go where the feeling is, where the emotions are and explore and write about their own part of what is going on.

- Essential in this is the personal narrative exploring our own identity - a reflexive methodology of what they are personally. They are individually, in fact, the project.
- Understanding the concept of complex responsive processes. Process thought rather than systems thinking.
- Socially reflexive - the need to articulate how they are thinking about the experience they are having.

- How the history of our family and organisational past is the way we are making sense of the present and future and how we can by an examination of this learn how we are different, but still connected (to family or organisation), and how this difference is what makes us a unique individual (differentiation).
- "Spirituality" is a provocation to develop our own way of thinking, subjective, narrative, reflexive. Taking our own ordinary everyday experiences seriously.
- Participative, experiential which evolves through a participatory process with others on programs. Here we ask "What are the patterns that are emerging between all of us?"
- Learning groups of 4-5 with a supervisor formed by them would be an ideal.

## Conclusion

The need for "Beyond Strategy" is that strategic plans often fail. It is estimated that only 5 - 10% of strategic plans are ever implemented.

The difference is that generally strategic planning is a logical abstraction reached through linear processing based on the "problem" (problem in the sense that the outcome or future being planned is uncertain) leading to "solutions" planned through actions of cause and effect within the existing "systems" paradigm - single loop learning.

The educational methodology we employ is anticipatory action learning centered on mapping, anticipating, deepening the future and creating alternative to the present through a shared vision. I see this process as external - the world - but as well internal, the meanings we give to our lives, our organisations. In this sense "Beyond Strategy" takes a therapeutic approach to organisations.

Action learning, therefore, can be seen as experiential learning whereas anticipatory action learning can be seen as an inner search for meaning and purpose as a futures experience through a search for a preferred future.

This approach to anticipatory action learning brings the context of futures studies that covers an empirical approach of predictions, an interpretive approach of understanding, ways of knowing and perspectives, a critical approach based on a philosophical and psychoanalytic platform and an action research approach through doing now what is meaningful and of purpose for our future.

As a case study I can think of no better example than my own organisation. As a business school we were concerned the short term thinking and subsequent bad outcomes that have been exposed over the last few years such as the collapse of Enron, World Com, Ansett, HIH and OneTel. How much of the collapses have been a direct result of the educational system taught at business schools?

As a result, a project team was put together of which I had the role of convening. The project was called "Beyond Strategy" and has resulted in new programs being offered such as "Applying Futures Thinking" "Relational Leadership" and the "Senior Executive Program" to address the imbalance.

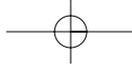
Through these new programs it is my hope that in futures studies, action learning, action research and human psychology we can move towards a better future which is inclusive for all and all the many ways of knowing, leading to more sustainable outcomes for organisations and greater meaning for the individuals in them.

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### Notes

1. From Stacey, R.D., (2001) *Complex Responsive Processes in Organisations – Learning and Knowledge Creation* Routledge, U.K.
2. For this paper I wish to acknowledge many major influences including all my colleagues at Mt Eliza and all those who have participated in the "Beyond Strategy Project", particularly Peter Dulmanis.
3. The "Strategy Tragedy" was a term coined by Dr Karen Morley to emphasis the effects of strategy in financial terms only, and the move of corporations from where shareholder value, in economic terms, took precedence to anything else in business.
4. I have been influenced by the work of Richard Slaughter in particular sight his chapter 4.1 "Foresight Beyond Strategy" (1999) *Futures for the Third Millennium: Enabling the Forward View* p.151 Sohail Inayatullah "The Learning and Healing Organization Chapter 13" *Questioning the Future* (2002 p.137) and Wendell Bell *Future Generation Forum: All About Evil World Future Society*, 28 October 2002.
5. Phill Boas, a colleague and psychotherapist, who over a thirty year period has developed a unique leadership methodology based on group dynamics and relational maps of interpersonal communication which is fundamental to "Beyond Strategy". His "Green Line" model is an excellent attempt at conceptualising beyond strategy thinking.



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