

Tactics as a turbulent mode of strategizing on the move:

An alternative review of the literature

Track: Strategy as Practice

Summary:

In academic writing, strategy tends to be represented as the ordering, controlling and purposefully arranging repertoire of higher organisational echelons whilst tactics remain the domain of lower hierarchical ranks, charged with executing the grand plans of strategy and muddling through the challenges of everyday life. Through a review of the management literature addressing the relationship between strategy and tactics, we build an alternative view of tactics as homologous to the turbulent nature of the environment with which they interact, and as an adaptive mode of strategizing. Borrowing an innovative meta-analysis method from anthropologist Gregory Bateson's work, we expose a constraining difference in kind, as well as degree, of representations of strategy and tactics in the management literature. We conclude our developmental paper by urging a rejection of prevailing taxonomical tendencies, and an embrace of processual thinking, as we continue to develop, research and communicate our ideas on strategy and tactics.

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The idea of a turbulent environment indicates a state of unruliness, commotion and restlessness; a condition that seems directly opposed to the calming, stabilizing and regular characteristics of strategy. Chia and Holt (2009: 20) invoke the term 'nice' to indicate the urge to understand the world in terms of proportional and ordered qualities which, perhaps, finds its most exalted and refined incarnation in linear, angular and reductive models of strategic management.. Yet, Chia and Holt also insist that 'nice' configurations of our environment may not only be naïve, but potentially furnish us with incentives to act in ways that lead to pathology when nicely configured plans run against the complexity and restlessness of wider systemic patterns (see also Bateson, 1972).

In the organizational literature, strategy is frequently disassociated from 'tactics', where tactics are portrayed as devoid of the oversight, ordering, controlling and purposeful arrangement of the world generated through strategy. In effect, strategy tends to be represented as the repertoire of higher organisational echelons whilst tactics, lacking a helicopter view, remain the domain of lower hierarchical ranks concerned with the muddling through life.

There are, however, more positive readings of tactics. Perhaps best known is de Certeau's (1984: pxvii; 37) suggestion that tactics are 'ingenious ways' of practically coping with reality 'on the wing'. Where strategy seeks lofty generalisation affording objective calculation of appropriate courses of action, tactics remain inside the hurly-burly of everyday work, providing temporary and localised responses to emergent issues. Yet, against the tenor of orthodox accounts for whom such work is 'merely' a matter of operational effectiveness, and not strategy (see, for instance, Porter, 1996), Chia and Holt (2009) suggest tactical work may cohere in the absence of any purposefully articulated frame and that, thusly viewed, tactics can offer an alternative conception of strategy on the move; continually re-arranging affairs without, at any point, imposing arrest and control. As a *modus operandi*, tactics are homologous to the turbulent nature of the environment with which they interact.

Taking leave from this insight, our developmental paper presents the initial findings of a review of the literature from a number of top-tier management journals in which we traced the portrayal of the relationship between strategy and tactics. We found the majority of papers either locating the utility of tactics in the translation of strategic ideas into purposeful action (e.g. Nutt, 1986), or as a tool or technique corresponding to the resolution of strategic barriers (e.g. Ashforth et al., 2007). However, we also identified accounts of tactics resisting the urge for a dissociated 'nicer' strategic frame and without the stigma of deficiency often ascribed to 'merely' tactical acts (Kolb, 1983).

Our review leads us to the conclusion that most characterisations of the differences between strategy and tactics are outlined in terms of *degree*, not *kind*, where strategy is ascribed more ideational, long term characteristics, while tactics is located at the other end of the spectrum, either viewed as translating strategic ideas into practice, or resolving issues that accrue when strategy is applied. Conceived in this way, the strategy-tactics divide is unhelpful, resorting to superficial distinguishing markers: long term issues belong to strategy, short term ones to tactics etc. The problem of such classification is not only that the difference between strategy and tactics is reduced to one of (more or less arbitrarily defined) degree; it also neglects the possible differences in kind that may characterise strategic and tactical engagements. Appreciation of these differences in kind, we suggest, may offer a way of rethinking the relationship between ideas (as well as studies) on strategy and tactics, shed light on why both areas have remained largely incommensurable, and offer ideas about how strategy can gain from the logics at play in the idea of tactics, and which have hitherto not been of concern for strategy scholars.

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In response, we draw on a method proposed by Gregory Bateson (1972) for generating bi-polar adjectives to characterise differences in kind and dimensions of behavioural understanding that are at play in the literature. While Bateson uses these, *inter alia*, to specify ethological differences between nations, we suggest they may be fruitfully employed to develop a processual reading of the ideas that (dis-)connect strategy and tactics.

On the basis of our review, we argue that a renewed focus on tactics may invite new insights into the ‘consumption’ and realisation of strategy by appreciating its differences and similarities in *kind* with tactics; i.e. as those affected by strategy inhabit and manipulate its “proper spaces” in everyday life. In developing practical and academic implications, our arguments aim to connect current theoretical (and often philosophically grounded) considerations of strategy as a mobile and ephemeral phenomenon with accounts of strategic work, practice or process, which help to further substantiate, illustrate and elaborate an idea of tactics as a turbulent mode of strategizing on the move.

Method

To uncover existing portrayals of strategy and tactics, we conducted a structured search (Tranfield et al, 2003) of the literature in top ranked “management” journals. We searched the SSCI top 100 ranked journals (as ordered on the 3rd September 2012) for papers containing the terms “strategy” and “tactics” in the title and/or abstract. From an initial return of 1429 possibly relevant papers, a review of abstracts was used to identify 105 papers that contained content relating to the relationship between the work of strategy and tactics. These 105 papers were then read in full, with electronic reviewer notes compiled in a database of the descriptions, arguments and conclusions concerning the relationship between strategy and tactics. These electronic notes were subsequently evaluated through multiple re-readings in order to identify characteristic arguments emerging from the literature. Whilst full traceability of the pathways to the emergent findings is retained through database entry linking, the results of this summative analysis as presented later in this developmental paper should be considered tentative as inter-researcher triangulation activities have not been concluded at the time of writing.

To further analyse the views identified in the literature, we draw upon Bateson’s (1972:88-106) bi-polar adjective method. Bipolar adjectives require the identification of opposing ends of continua referring to “themes of relationships” between differentiated but inter-related groups of individuals or concepts (Bateson, 1972:94). Bateson insists we commit errors in epistemology when we classify social (or in fact all ‘living’) processes into rigid taxonomies. Such errors accrue, for instance, when we cluster conceptions of strategy and tactics into an imaginary four quadrant diagram, as is our frequent *modus operandi* in business and management studies. Bateson proposes that adjectives describing some aspect of a group’s character (ethos) normally imply the existence of the opposite behavioural display, against which the former first can become meaningful. So, for instance, it makes little sense to speak of one nation as being dominant, while another is submissive. Neither dominance or submissiveness can exist as independent descriptions as a group cannot have a conception of dominance without understanding, at the same time, what it means to be submissive (*ibid*:91).

Bateson (1972:100-101) illustrates this method by comparing American and English parent-child relationships using bi-polar adjectives of dominance-submission, succoring-dependence and spectatorship-exhibitionism. By using the bi-polar adjectives to describe general patterns of characteristics (e.g. English parent-child relationships tend to be more dominant-submissive than American parent-child relationships, which tend to be only slightly dominant-submissive), we can compare the tendencies of each population and anticipate the compatibility

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of methods between populations without claiming to be able to predict individual cases (i.e. we don't claim that we can say whether any particular English families parent-child relationship will be based on strong dominance and submission).

From this insight, Bateson develops what he terms a 'processual' method which operates not by locating particular groups at different ends of spectrums (e.g. either dominant or submissive), but by suggesting that some groups' ethos has a conception of, that is recognises and responds to, behaviours along a dimension from (the oppositional adjectives of being) dominant or submissive.

We connect Batson's pattern to our concern for strategy and practice, attempting to use his method as a means to highlight the different emphases of the patterns and tendencies in processes of strategy and tactics work as presented in the literature. By identifying the "themes of relationship" that scholars to date have suggested as seeming to be of importance concerning "strategy" and "tactics" separately, we can develop a basis for commenting on the compatibility, potentiality and challenges inherent in their mooted relatedness.

The application of this method represents meta-analysis – analysis of the summative analysis for recurring patterns and themes. For strategy and tactics separately and together, this analysis involved multiple readings of the summative analysis, and the attribution of bi-polar adjectives to emergent themes of relationships identified. As with the initial analysis, a full trace of the development of the findings presented in this paper was retained in a database. However, as a product of the summative analysis that is currently under replicative review, the findings of the bi-polar adjective comparison should also be treated as tentative.

The use of bipolar description is not alien to strategy and tactics literature – Van Maanen and Schein's (1979:209-264) seminal work on socialization strategy and tactics being a notable example that has been replicated many times since (e.g. Jones 1986; Allen and Meyer 1990; Ashforth and Saks, 1996; Jansen et al 2005 etc.). However, to the best of our knowledge, bi-polar adjective method has not been applied in an overarching way to examine the relationship between the concepts of strategy and tactics. As we seek to respond to the call for novel methodological approaches in strategy-as-practice research (Balogun et al, 2003), we welcome critical perspectives on the application of this technique in particular.

Findings – Part (i)

In this section, we offer an overview of the findings of the summative analysis aspect of the literature review. Three main modes of relationship are identified – tactics as a means for detailed local enactment of strategy; tactics as techniques for addressing unanticipated strategy-related problems; and tactics as the realisation and manipulation of the proper spaces of strategy. Comparing the descriptions of each mode of relationship, we can detect the varied, and arguably conflicting, ways in which relationship between the work of strategy and tactics is represented in the literature.

Mode 1 - Tactics as a means for detailed local enactment of strategy

The relationship between tactics and strategy is frequently conveyed as being one of varying scope, where tactics are specific forms of planned activity, chosen to deliver strategy as a more general or abstract set of objectives (Nutt, 1986; 1999; Huntsmann, 1994; Tardif et al, 2010). Tactics can often be described as the mechanisms for operationalising a business model (e.g. Casadesus-Masanell and Ricart, 2010), strategy plan (e.g. Nutt, 1987) or strategic projects (e.g. Slevin and Pinto, 1987; Pinto and Prescott, 1990), and are seen to follow strategy

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formulation (e.g. Nutt, 1989). On this sort of cascade model, higher levels of hierarchy tend to be charged with 'strategy' related activities, whereas those lower down are responsible for 'tactics' (Smothers, 1990). Military origins of strategy and tactics are frequently invoked (Urwick, 1963; Durham, Knight and Locke, 1997).

Mode 2 - Tactics as techniques for addressing unanticipated strategy-related problems

Tactics are frequently viewed as techniques by which barriers to achieving strategy work might be overcome (e.g. Elsbach et al, 1998; Cropanzano et al, 1999; Schuler et al, 2002; Ashforth et al, 2007; Kreiner et al, 2009). As means to an end that might vary in exact form of circumstantial application, tactics are described as designed behaviours or contingent techniques which might be used to execute the detail of strategy work unanticipated at the time of planning (Rock, 1987; Eisenhardt et al, 1997; Kim et al, 2005; Dahlander and Magnusson, 2008).

A key theme related to this view of tactics is that if we consider them to be just a tool, then we need to separate our moral or ethical views of how tactical approaches have been used from how they might be used (Elsbach and Sutton, 1992; Pfeffer, 1992; Anand et al, 2005; Kellogg 2011). As well as solving problems, tactics as problem solving techniques are also portrayed as having the potential to unintentionally generate strategic issues. In other words, as argued by (Pauchant et al, 1992; Den Hond and De Bakker, 2007; Tepper et al, 2007; Gutierrez et al, 2010), tactics can be deployed with one end in mind but without a clear understanding of the long term strategic systemic effects that will be realised.

Mode 3 - Tactics as the realisation and manipulation of the proper spaces of strategy

Following de Certeau's (1984:xvii) description of tactics as the ingenious everyday ways in which the "weak make use of the strong", manipulating events within the 'proper space' of strategy to generate opportunities, tactics are often set in opposition to the stabilising tendencies of formal organisational strategy work produced by a dominant order such as a top management team (Isenberg, 1987; Fortado, 1994; May, 1999; Hodgson, 2005; Cutcher, 2009).

As semi-automatic actions taken on the fly in response to an equivocal, unfolding reality within which strategy represents more stable, continuing frameworks (Isenberg, 1987, Anand et al, 2005; Kreiner et al, 2006; Ness, 2009), tactics are portrayed as incorporating the expertise, creativity, intuition and willpower of individuals (Eisenhardt and Zbaracki, 1992; Miller and Ireland, 2005; Ashforth et al, 2007; Collin et al, 2011). From this perspective, tactics are often represented as leading strategy through the generation of novelty and opportunities that contribute to the shaping of the longer term direction of an organisation over time (Gilmore and Camillus, 1996; Baker et al, 2003; Sonenshein, 2006).

Findings – Part (ii)

Figures 1-3 below illustrate the findings of the meta-analysis of the patterns of representations of strategy and tactics as related but differentiated concepts. The bipolar adjectives in each of the figures show principal concerns identified in the literature reviewed e.g. authors writing about the work of strategy seem concerned with the key themes of neatness-messiness; calculation – intuition; stability-disruptiveness and lightness-darkness ... whilst these themes are descriptively present in the tactics literature, they do not manifest as key themes of relevance. A comparison of the different figures suggests that the notions of strategy and tactics are concerned with very different aspects of the worlds, overlapping only in a concern with how the gains of activities are distributed.

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Neat	↔	Messy
Calculated	↔	Intuitive
Stabilising	↔	Disruptive
Light	↔	Dark

Figure 1 - Prominent Themes of Relationships in the Work of Strategy

Dynamic	↔	Static
Embedded	↔	Detached
Adaptive	↔	Fixed

Figure 2 - Prominent Themes of Relationships in the Work of Tactics

Principal-centric	↔	Agent-centric
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Figure 3- Prominent Themes of Relationships in the Work of Strategy and Tactics

Concluding remarks

Our paper engages with the idea that the world is not neat and the categorisations and taxonomies that attempt a rendering of messy territory into clear structures are problematic. From this view not only is strategy, as the pursuit of objective oversight and clear formats, potentially dangerous, so too are our ways of cataloguing the ideas and research papers that report on strategy and tactics. Urged by this concern to reach for an alternative way of approaching strategy and tactics, we found Bateson's method of bi-polar adjectives productive in highlighting that the differences between both concepts are not just a matter of degree, like concepts being placed neatly into a graph, but also an issue of kind. In particular, we found that the (to crudely borrow Bateson's terminology) 'ethos' of tactics differs from strategy; the former entailing concern for dynamics in a way that is alien to strategy while the latter's concern for questions of messiness and neatness (and all permutations between these two dimensional opposites) make little sense for someone engaged in practice. Taken together, we may gain a better idea of why both approaches fail to correspond, fruitfully and productively. Yet, our review also indicated some, albeit rare, accounts where differences in kind were bridged; strategy showing appreciation for matters of tactics and vice versa. These approaches correspond with de Certeau's characterisation of strategy freed from the bewitchment of questions of dynamism-statics, calculation-intuition, but instead embracing tactical vocabularies and concerns.

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