We need to talk about strategy:
How to hold effective strategic dialogue?

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Abstract:

As researchers and consultants, we've spent the last few years helping a dozen major public and private organizations understand what went wrong with their strategic planning. We discovered that executives have a hard time doing strategy because they are at a loss when the time comes to engage in strategic dialogue. Either their teams debate the organization's values and goals when such issues should be settled, or they waste time on the detail of specific projects that have yet to receive the green light. But whether the conversation is too broad or too narrow, strategy stays out of view. Drawing on recent developments in strategy-as-practice and decision-making literature, we propose a model that executives can follow to take control of strategy meetings and keep their teams on track. We ask them to *focus* on the right decision purpose, *adjust* the meeting's communication style, and *cast* the right leader for the job. When these three simple rules are followed, the pillars of successful dialogue are aligned, and executives can finally talk about what matters most to them: strategy.

Unstrategic dialogue: a common problem

Pierre, CEO at Unibank (a pseudonym), brought the executive committee's meeting to order and opened proceedings with what he thought was a simple, direct question: "Should we acquire the portfolio of our main competitor, Stanley Financial?"

Tony, the CFO, dived straight into talking about figures, pushing forward a 30-page report he'd prepared. If his calculations were correct, the merger would reap +10 points in net banking income and boost their stock price. The Head of Transformation, though, refused to even look at the document. With his change management experience, he knew that the merger would jeopardize the digital banking program he had to deliver by the end of the year. "How would the merger impact our program?" he demanded. "What are the concrete steps and the timeline?" Then Cynthia, the Chief HR Officer, threw in her two cents. She was distraught that she hadn't been consulted earlier on this critical issue. "I would have told you this is a big mistake," she admonished. "Stanley's corporate values are a world away from ours!"

Within minutes, the conversation descended into acrimony as the three VPs went head to head. Around the table, other directors slumped resignedly in their seats. Venturing an opinion would only create even more friction. Was this merger another of Pierre's fancies? Was it a relevant and well thought-through strategic decision? With more than 30 years in the industry, Pierre was respected for his strong business acumen, but his impulses had derailed Unibank activities in the past.

Pierre realized the meeting was merely sowing resentment. It wasn't the first executive get-together to end this way. Every time they met, it felt like they were slipping backwards, instead of leaping forward as he hoped. Why couldn't such brilliant executives put their weight

behind a decision? His disappointment was echoed across the company: after this episode, rumors circulated that a merger was on the cards, even though it wasn't, with some whispering that Pierre might not be the best leader to steer Unibank through such a complex environment.

This real-life case shows us that many executive teams simply do not know how to talk strategically. Executives spend hours in so-called "strategic meetings" but end up with no clearer idea of where they are headed. While they walk in hoping to make progress, they come out even more confused about issues they thought were settled, their desks piled high with documents detailing solutions to problems that were never clearly defined in the first place.

As both researchers and consultants, we've spent the last years helping a dozen major public and private organizations understand what went wrong during strategic planning. We observed executives in committee meetings where strategies were crafted or implemented in areas from rationalizing product offerings and diversification to M&A and efficiency drives. We scrutinized what was said and done as executives tried to craft a strategy and make it happen. And we collected the documents that were circulated, as well as conducting interviews with key people at every level.

We found that senior executives expend considerable energy in unproductive conversations that change nothing at best, or cause conflict at worst. A conclusion from our observations is that executives have a hard time doing strategy, because they are at loss when comes the time to hold strategic dialogue efficiently. Their teams talk about the organization's values and goals when such issues should be settled; or, on the contrary, they spend time laying out the details of a particular project when no decision has been made yet to engage resources into it. By making the conversation either too broad or too narrow, strategy is kept out of focus.

This hampers the business's ability to make strategic decisions before windows of opportunity close. Ultimately, organizations may find themselves ensnared in toxic re-examinations of hard-won consensuses over their values and missions, or wasting time and money on projects that never get off the ground. As a consequence, team members and employees may doubt the leadership, as well as the value and sincerity of future strategic proposals.

Strategy happens through conversation, which is why mastering strategic dialogue is crucial. We propose a simple, three-part model that executives can use to take control of strategy meetings and keep their teams on track:

1. **Focus** on the right decision purpose
2. **Adjust** the meeting's communication style
3. **Cast** the right leader for the job.

When these three simple rules are followed —*focus, adjust, cast*—the pillars of successful dialogue are aligned, and executives can finally talk about what matters most. Opportunities can be seized in time, threats can be evaded, and resources can be directed where they make the most impact.

Strategy is dialogue

Over the last decade, research focused on the practice of strategy has begun paying closer attention to what executives actually do when they engage in strategic planning. An important discovery has been that strategy is, at heart, a *dialogical process* that occurs during dedicated meetings (Whittington, 1996; Jarzabkowski, 2005). When dealing with complex and uncertain cross-functional issues – and strategy surely requires so – executives' capacity to exchange ideas

through positive conversations becomes in fact critical (Weick, 1995; Tsoukas, 2009). They use dialogue to share stories about the organization's opportunities and threats (Fenton & Langley, 2011), shape the course of action that is the most relevant and accrue the largest support (Cooren, Bencherki, Chaput, & Vásquez, 2015; Kwon, Clarke, & Wodak, 2014), and sketch out the strategic documents that will guide its implementation (Pälli, Vaara, & Sorsa, 2009; Kaplan, 2010). Dialogue, therefore, is not merely a conventional communication channel through which information about already-taken decisions is disseminated; it is the very tool with which a vision is formulated and strategic decisions are taken and implemented.

The word "dialogue" has its roots in Ancient Greek: *dia* means "across," and *logos* is "speech." In this vein, building on Socrates' dialogues with his pupils on justice and ethics, philosophers such as Martin Buber and Jürgen Habermas stressed the importance of rational conversations to welcome diverse perspectives and generate ideas that go beyond either party's initial knowledge or assumptions (see Nardone and Salvini, 2007; Westoby, 2014). The goal of dialogue is not merely to express and transmit one's thoughts and preferences, but to collaborate in establishing a shared space where ideas can grow and be tested against each other (Arnett, 2016). So dialogue is not just any form of talk; it must be carefully orchestrated and facilitated so that it is truly productive and conducive to thrilling ideas.

Scholars from various traditions have pointed to the crucial role of dialogue in the crafting of strategy and in its ability to reach desirable effects. Top Management Team theorists, for instance, posit that the degree to which executives engage in mutual and collective interaction determines the quality of strategic outcomes (Hambrick, 1994). In other words, "if top executives do not engage in information processing or decision-making, then what is the point of trying to use

their collective characteristic (demographic or otherwise) to predict company strategy or performance?" (Hambrick, 2007, p.336). Yet, these researchers also acknowledge that the social processes facilitating interactions between top executives, including communication, remain blackboxed, and therefore represent a promising avenue for future research (Finkelstein, Hambrick and Cannella, 2009). Other scholars, closer to the decision-making tradition in strategy, specifically uncovered the positive relationship between "disinterested dialogue"—a fact-based, transparent conversation about the decision at hand—and decision-making effectiveness (Garbuio, Lovallo, & Sibony, 2015). Strategy-as-practice researchers, for their part, studied how the micro-social practices of strategic meetings (agenda-setting, rules about taking turns, organization of debate, etc.) contribute to stabilizing or destabilizing strategic orientations (Jarzabkowski and Seidl, 2008) and how mobilizing certain "microdynamics" in the boardroom can increase cohesion around the strategic decisions taken (Kisfalvi, Sergi and Langley, 2016). While these studies mostly focus on upper echelons, the virtues of dialogue have also been described in relation to middle-management and front-line workers. For instance, since strategy requires everyone to understand and engage with the situation, several authors have called for employees at all levels to have a voice in strategic dialogue (Roobeek, Mandersloot, & du Marchie Sarvaas, 1998; Riis, Dukovska-Popovska, & Johansen, 2006).

Building on this research and our own observations, we provide an integrative framework showing how to conduct strategic dialogue. Although we focus top executives' interactions, as these individuals play a crucial role in the decision-making process, our model, as we will see, can illuminate the communication processes that support both the conception of strategy and the engagement of the lower echelons towards its implementation. Executives intuitively know that they must keep the conversation flowing to make the right decisions. However, *how* they can do so

is less clear. We suggest that they need to recognize the key components of dialogue—or "three pillars," as we call them—and realize that they take a unique form when addressing strategic issues. In other words, not all conversations are strategic, but those that are require careful framing and alignment of the key components of dialogue. In the rest of this article, we outline a simple model to help executives achieve this goal.

Aligning the three pillars of strategic dialogue

First, let's look at the three pillars that support all kinds of dialogue. Each answers a key question:

1. **Decision purpose**: *What* decision are we hoping to reach through this dialogue?
2. **Communication style**: *How* should dialogue be carried out in order to reach that decision?
3. **Leadership role**: *Who* should be facilitating dialogue? This can be either a specific person, or a particular role the leader should play with respect to their team.
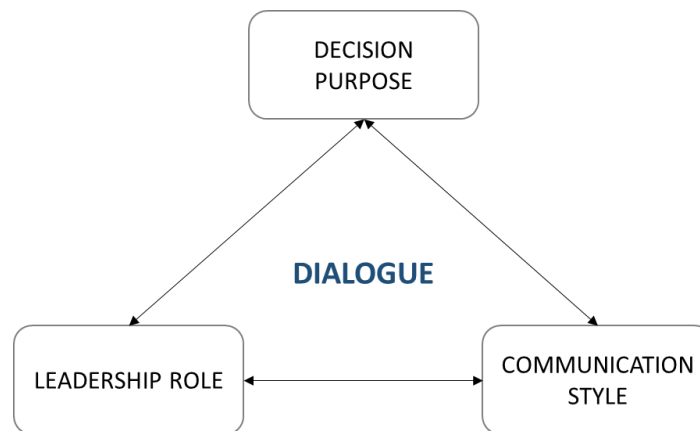

Figure 1: The three pillars of dialogue

These are not sequential steps; all three pillars must be considered together in order to lock down what executives have to say, how they say it, and the role of whoever will carry the message and structure the conversation. By taking the three pillars in conjunction, executives can also link the

substantive outcome of dialogue (i.e. decision purpose) and its more processual components (i.e. communication style and leadership role).

The first pillar is purpose. When engaging in dialogue, we have an aim in mind: persuade someone to do something, generate new ideas, obtain information, understand a complicated situation, and so on. In other words, we know the outcome we want from the conversation, and that determines how we go about it—that is, communication style, the second pillar.

If we want to support our decision purpose, we must strike the right note in our conversation. Closing a deal with a banker, facilitating a senior management workshop, and getting a big crowd fired up about a new corporate mission all involve dialogue, but varying communication styles. We intuitively know different situations call for different approaches, yet we don't always correctly identify the situation and how we should respond to it.

Finally, each communication style requires its own leadership role, and this is the third pillar. This doesn't necessarily mean that a different person should be in charge, but it does mean that leaders need the humility to acknowledge that the same role may not always work, even though it may have worked in the past. Meetings on technical issues, for example, require open exchanges based on expertise rather than hierarchical positions.

For dialogue to succeed, the three pillars must be carefully aligned. Depending on the purpose, a different communication style must be adopted, which in turn will attribute a particular role to the leader. A mismatch may go unnoticed, but it will have a profound effect on how the conversation unfolds.

Now let's turn to what specifically makes each pillar *strategic,* and how we can align the key components of strategic dialogue. To do this, it's useful to compare strategy to two other activities with which it is regularly confused: politics and tactics. This distinction is inspired by the ground-breaking work of Carl von Clausewitz (1873), a Prussian general and theorist who is still considered the forefather of strategy nearly 200 years on. His writings have inspired countless discussions in the field of strategic management (Gray, 1999), but seldom in relation to dialogue and the conduct of strategic meetings.

	Political Dialogue	Strategic Dialogue	Tactical Dialogue
Decision Purpose	Building coalitions	Engaging resources	Deploying actions
Communication style	Explorative	Argumentative	Performative
Leadership role	Symbol	Adviser	Coordinator

Table 1: The key attributes of political, strategic, and tactical dialogue

Politics, Clausewitz explains, is about establishing alliances, strategy involves engaging resources for specific enterprises, and tactics consists in the daily decisions that carry out the strategy on the field. Although each one involves the others, each must be conducted at different times—but, more importantly, *in different ways*, and by *different leaders*. Politics calls for individual, open-ended conversations where interests can be aligned around a vision. Strategy, in contrast, requires a fact-based debate, where a limited number of experts can set aside their ranks and challenge each other's views with well-supported arguments. Tactics, meanwhile, opens up dialogue to the broader (organizational) audience; it is concerned with the giving of orders and requires the legitimacy of people with field experience. Conversations, in this last case, aim at mobilizing many people in a simple yet detailed way. Adapting and

extending Clausewitz's insights, in Table 1 we compare the three pillars of strategic dialogue with those of its political and tactical counterparts.

Stranded at the crossroads between politics and tactics, strategic dialogue is often forgotten or contaminated. On the one hand, given the strong competition among executives, they may support a strategy to further their personal interests—and therefore fall back on political dialogue when they should be talking about strategy. On the other hand, most of executives' day-to-day activities deal with the concrete problems of their department or division, and they may be tempted to jump on short-term, operational issues related to tactical dialogue. For instance, in a large energy company that we observed, strategic dialogue was literally the missing link. Top managers would put great effort into securing their annual budget through political lobbying, then jump straight into daily business conversations without any fact-based analysis of resource allocation. Instead, strategic decisions would be passed on to frontline workers under the false pretext of tapping into their "pragmatic" attitude. The focus-adjust-cast model can help fix this sort of situation.

The focus-adjust-cast model

Focusing the decision purpose of strategic dialogue: engaging resources

The first step is for executives to clearly understand what they are trying to decide—that is, the decision purpose of the conversation. This requires proper framing, which means boiling down the conversation to its essentials and making sure everyone knows them. The distinction between politics, strategy, and tactics comes in handy here. If you are trying to convince people to work with you towards a common vision, you are attempting to build a coalition and doing politics. Political decisions revolve around people's beliefs, values, and ideas for the future, but also their

personal interests. Addressing such issues is crucial, but a strategic meeting is not the place to do so. Strategy meetings are about what scholars call "procedural rationality" (Dean et al. 1993) in the engagement of resources towards a specific project. While the political decision purpose focuses on the "why" of a project, the strategic one is concerned with the "what" and "where." In other words, once energy has been gathered around a general vision, it must be turned into a plan: What should we do with our resources? Where should we allocate them? Finally, tactical decision purpose is about deploying actions in dynamic spheres of operation to answer the question "how."

Have you ever felt that your team was losing sight of its decision purpose during an executive meeting? Did you wind up revisiting "why" questions that were supposedly settled long ago? Or, at the other extreme, did you delve into operational issues when the systematic engagement of resources had yet to be decided? In a large hospital that we observed, the meetings of the committee in charge of investment decisions were systematically undermined by a lack of framing and the constant shifting of decision purpose during strategic dialogue: while some contributors kept returning to question projects' *raison d'être*, others jumped forward by asking for never-ending details on deploying actions. "Always start with the why," says Simon Sinek (2011), the famous marketing consultant; this is certainly true, and political discussions must happen before strategic dialogue can begin. But we could also add: Don't constantly reopen the "why," and don't dash off too quickly towards the "how." Strategic decision purpose keeps the focus on the "what" and "where" of engaging resources.

Consider another example. Mark is the CEO of a large chain of grocery stores in Canada that we did research for. He was sitting with his executive committee, listening to teams taking

turns pitching the strategic plans they'd prepared. Something was wrong, but he couldn't put his finger on it. The ideas were good, but, somehow, he still did not know what to do about them. "They kept telling us how we should shape our values, our vision, our mission, as if we don't know who we are," he complained, as we walked back to his office. "The problem is actually what we should be doing—and that's the one thing no one told us about!" Although nominally "strategic," and concerned with many of the topics you will find in strategy books, the pitches Mark heard were not actually about strategy. They left him puzzled about which opportunities to seize, which projects to invest in, and which to drop. Defining who you are as a business, and uniting people around a broad vision, certainly matters. But executives like Mark can't reopen political debates each time they need to make a strategic decision.

We also found that executives often engage in dialogue at crossed purposes. Let's go back to Unibank, who we met at the start. Pierre asks his executive committee whether or not to pursue a merger, but each VP speaks to a different matter in his answer. While the CFO is concerned with the economic rationale of the merger (engagement of resources), the Head of Transformation wants to know the practical steps of implementation (deploying actions), and the Chief HR Officer questions the values behind the merger (building coalitions). What's more, both the Head of Transformation and the CHRO contaminate the conversation with their personal interests: the first wonders how the merger will impact his own program, the second is vexed not to have been consulted on this HR-related issue. But it's not really their fault—the decision purpose of the meeting was not clear. A merger, as in Unibank's case, needs early talks among companies' shareholders to decide whether they should put their votes behind a common objective that deserves commitment—achieving market leadership, acquiring strategic assets, getting financial liquidity, and so on. Only after this is nailed down can integration planning be

considered. Here, top managers are looking at the facts and figures in order to evaluate potential synergies and craft the best roadmap to achieve them. Executing that roadmap is a tactical decision purpose. This is where senior executives look at day-to-day integration tasks, from a Project Management Office platform, to set milestones with concrete outcomes and timelines. The threshold between politics, strategy and tactics may not be the same for all firms. For instance, some major groups may treat small acquisitions (e.g. buying a supplier to vertically integrate) from a tactical standpoint, while it would be highly strategic or even political for a small company. This, however, does not change the fact that all types of purpose are necessary and will occur at some point in the decision-making process.

Adjusting the communication style of strategic dialogue: an argumentative debate based on facts
The way to keep strategic dialogue on track is by adjusting the communication style of the conversation.

Each decision purpose has a preferred communication style, a term we use to refer to the format and communication techniques used to carry out dialogue during meetings. Building political coalitions involves an *explorative* style: intimate, open-ended conversations where values and interests can be expressed in order to establish a relationship between two people. There's no need for a precise discourse at this stage. What counts is triggering the desire to cement potential alliances, usually through the classic out-of-office rendezvous or corridor chats.

In contrast, engaging resources requires an *argumentative* communication style. Here, strategic dialogue is a structured debate among a small group of experts, who reach a shared understanding of the situation by debating and challenging well-supported ideas. This brings us close to the idea of dialogue as understood by philosophers such as Habermas: a conversation

held according to rules of argumentation where, through the positive exchange of contradictory arguments, a group of people may attain a form of *communicative reason*. This is why strategic dialogue has been described as a requiring a "fact-based, transparent conversation over the decision at hand as part of an existing portfolio of decision" (Guarbuio et al., 2015), or as "a fully integrative decision-making process that generates profit scenarios traceable to market, competitive, cost uncertainties, and strategic alternatives" (Legare, 1998). The argumentative communication style involves extensive analysis, comprehensive information, and knowledge of constraints; it calls for adequate preparation and a specific structuring of the conversation.

Finally, the tactical communication style is *performative*. To deploy actions in context, tactical conversations tell people about the plan, coordinate their day-to-day activities, and give them the confidence to work towards their goals. Tactical communication usually has top-down, streamlined style. Table 2 summarizes the main components of the explorative, argumentative, and performative communication styles.

Communication Style	Explorative	Argumentative	Performative
Repertoire	• Value and interest-based • People and ideas • Leader beliefs and vision	• Fact-based • Facts and figures • Options and scenarios	• Task-based • Objectives and milestones • **Toolbox and schedule**
Format	• Open-ended • Informal • Confidential	• Structured • Formal • Restricted	• Streamlined • Formal • Public
Setting	• 1 to 1 • Out-of-office rendezvous and social events	• N to N • Workshops and ad-hoc governing bodies	• 1 to N • Events, team meetings and internal communication
Technique	• Influence • Reformulation	• Intelligence • Debate	• Pedagogy • Storytelling

Table 2: The key components of explorative, argumentative, and performative communication styles

The importance of adjusting style to purpose was acutely felt by Armin, president-founder of a Canadian mid-sized architecture firm we observed. With an eye on retirement,

Armin was exploring the possibility of selling his majority share to a foreign company. A British architecture giant expressed interest, and suggested that two of their top executives flew to Canada to discuss the possibility of a buy-in face to face. Armin agreed, and proposed a private dinner to get acquainted and explore their common interests—their vision for the company, their goals and values, who would be the new CEO, and so on. But because Armin was retiring, and the British buyers were aiming for efficacy, they asked instead to attend a board meeting where they could meet all the shareholders at the same time. Armin felt put out, but organized the meeting anyway—which was a complete catastrophe, due to mismatched communication styles.

Armin began with a short, off-the-cuff presentation on the history, core values, and achievements of his firm, hoping to initiate an open-ended conversation. But the Brits pulled out a detailed technical report on their firm's markets, products, and organization. They delved into numbers and shared detailed information about economic performance and potential synergies, quizzing the shareholders on which merger scenario they preferred. The Canadian executives, deeply uneasy, listened in stony silence.

The problem was that Armin hadn't had a chance to have early political talks with each board member to build a coalition and explore interests. As a result, he felt the British were jumping the gun by putting a fact-based analysis on the table way before time. "It made me look weak in front of my own board," he explained. Recalling the general atmosphere of the meeting, a board member remarked: "Our tone in the conversation was off. We didn't know what to say— and anyways, we were way too unprepared to say anything constructive. While they were giving us tons of information, we had nothing to show for on our side, and felt quite ashamed frankly."

When the British gents concluded their presentation, Armin politely thanked them and put them on the first flight back to London. The merger would never see the light of day.

People rarely appreciate how critical communication can be in the strategic planning process. But this example shows how a mismatch between decision purpose and communication style can create real problems. While Armin wanted to adopt an explorative style, suited for building the foundations of a coalition, the British execs used a fact-based argumentative style coherent with the engagement of resources. For them, the merger was already a strategic issue. This resulted in mutual incomprehension, lack of preparation from one side, disappointment from the other, and ultimately the failure of the merger.

To allocate resources efficiently, strategic dialogue's argumentative communication style depends on two factors. First, factual documents will create a shared understanding of the situation—asset cartography, costs baselining, market research, and so on. This requires intense preparation in the form of data collection, analysis, and synthesis. Leading consulting firms such as McKinsey and BCG understand this well, and have made their "fact-based, hypothesis-driven problem solving approach" a trademark (Rasiel and Friga, 2002) while investing massively in business intelligence solutions that they put to good use when crafting their strategic deliverables (Christensen et al., 2013). Let's rewind to our Unibank example once more. By pushing forward a 30-page report presenting facts and figures on the best possible scenario for the merger, the CFO is the only one to adopt an argumentative communication style. Yet the meeting still lacks preparation, since the others didn't get a chance to go through the document ahead of time.

The second crucial element is what we call "structured spaces"—usually workshops or ad-hoc governing bodies. Here, a limited number of competent participants (e.g. 5-10) can

debate over what they think is best for the company based on available facts, but also their own expertise and experience. While both the explorative and performative communication styles avoid contradiction in order to settle alliances or attribute tasks, strategic dialogue depends on the free and positive opposition of ideas. Executives must move out of their entrenched positions, agree to focus on the data available, and be critical of their own opinions (Garbuio, Lovallo, & Sibony, 2015; Jacobs & Heracleous, 2005, Charan, 2001). This is also why the argumentative communication style relies heavily on techniques like mind-mapping, meta-planning, and brainstorming, which help to organize debate over diverging ideas.

Consider another example from a major university where we worked. At this institution, regular departmental meetings gathered together 40 professors, who were often asked to decide which scientific field future recruitments should be made from. Although these decisions were concerned with the engagement of resources, they were taken without preparation or supporting fact-based documents, in a setting that was way too crowded to engender proper debate, and with no facilitation of exchanges. Not surprisingly, the meetings would end up as political arenas where various coalitions promoted their own disciplines and personal agendas. Usually, the loudest, most experienced, or most scientifically legitimate professors would win out, creating tensions, resentment, and often poor recruitment choices in the process. However, a minor shift in communication style produced fascinating results. Before the meeting, the head of department prepared and circulated a short analytical document presenting detailed information on resources in each field compared with numbers of classes and students in each class, leading to an overall ratio of students to professors. This was enough to create a factual, common understanding of the situation among the group and encourage consensus on resource allocation. Once the large group agreed on a scientific area, a smaller team of five or six professors, experts in the field, would

hold an in-depth strategic debate over profiles and research and make recommendations for the department, which ended up being systematically followed.

The argumentative communication style emphasises structured, fact-based debate. That distinguishes it from the performative style of tactical dialogue, which tends to be unilateral, with a top-down, broadcast style, as often seen in team meetings and larger assemblies. A fixed script is rolled out according to a strict timescale without deviation, with extensive use of teaching and storytelling. We believe that the recent focus on "strategy execution" and a penchant for "increased bottom-up relations" in the production of strategy might have over-emphasized the importance of this communication style. Perhaps it gets attention because it sometimes forces executives to stand before large and intimidating groups in an entertaining format. But it should still not overshadow the others, because communication is as crucial to crafting strategic decisions as it is to implementing them.

Cast the right leader: an adviser to organize debate

The two first pillars of strategic dialogue are crucial, yet they can't stand firm without the third: leadership. Strategic dialogue needs someone to frame the conversation, structure the exchange, and carry its major themes. So success depends on choosing the right person to fulfill the leader's role: someone whose professional image in the organization fits with the decision purpose and communication style at hand. In a communicational setting, the leadership role is closely tied to perceived legitimacy, which can be derived from credentials, network, hierarchical position, field experience, and so on. But the same leadership role, or the same sources of legitimacy, may not work in every setting.

In political dialogue, the leader of the conversation must inspire their interlocutors. Therefore, they play a *symbolic* role, embodying the values they are defending and living up to the vision they are proposing. Most of their authority does not flow from their formal position, or even from their competence, but from their ability to build a network and secure the right to represent them by triggering desire and identification. However, when the time comes to hold a strategic dialogue, the leader must adopt the role of *adviser* on the issue they are an expert in, and concede that others round the table may be experts in their own fields. This requires humility: the leader must debate the strength of each proposal, but also submit their own ideas to debate. It is not the time to pull rank, or even to inspire, since either could lead to poor decisions made out of sycophancy. Drawing their authority from their competence, the leader-adviser's main contribution is to organize and conduct workgroups with rigor and impartiality. As for tactical dialogue, it requires the leader to be a *coordinator* and a central point of contact for all operations, reminding each person what they must do, controlling the completion of each task, and motivating teams through tough times. In the organization, coordinators carry an image of pragmatism based on their past experiences and related performance. They provide guidance to frontline workers through discipline and reliability.

As before, a mismatch of leadership role can harm the strategic planning process, as the following example shows. At a national subsidiary of a large bank, the Chief Marketing Officer had taken over the leadership of a major strategic move: launching a new digital venture. She was a young, charismatic executive with a solid network—yet she lacked competence in business-unit management, due to her functional affiliation. Knowing this, she turned to a consulting firm to help her craft a strategic plan to go to the regional directors for approval. After thoroughly analyzing the market, resources, and constraints, the consultants came up with a 50-

page fact-based report proposing different scenarios, and suggested discussing the options with the regional directors. But the CMO refused, fearing she would lose control. Instead, she opted for a rather vague (albeit inspiring) vision of the project that she tried to impose on the directors during a meeting. Her interlocutors, however, all had great expertise in profit and losses and banking strategy; not only were they exasperated to have been shut out during the project's early talks, they also wanted a chance to debate the option on the table. To defuse the resentment, the CMO appealed to her functional authority and support from the CEO, but it wasn't enough. In the end, the project was taken over by one of the regional directors and managed from tactical standpoint, giving it little chance of success from a strategic and market perspective.

In the companies we investigated, senior executives often had blind spots when assessing their own legitimacy and adjusting their leadership role accordingly. Casting the legitimate leader for executive dialogue requires self-awareness and a good dose of humility (Morris, Brotheridge, & Urbanski, 2005; Ou, Waldman, & Peterson, 2015). As the Top Management Team literature has shown, there is no ready-made recipe for finding the right person or people for a given situation, as a number of contextual factors matter (Finkelstein, Hambrick and Cannella, 2009). Yet, it may be more effective to seek someone with the rights skills and qualities to handle a portion of the process, than to try and mold ourselves to every purpose (Hambrick, Cho, & Chen, 1996; Wiersema & Bantel, 1992). We have to admit that creating our own professional image and imprinting it on the organization is a long, hard task; we can't just change it on a whim. All too often, senior executives are entrusted with leading strategic dialogue because of their rank, not their fit with decision purpose. You shouldn't carry all the milestones of a project just because you have official responsibility for it. Conversely, you

shouldn't present a strategic plan to stakeholders just because you've been working on it for six months.

Rupert Young, the CEO of a large consulting firm in which we worked, thoroughly understood the importance of the leader's role as adviser during strategic meetings. He also had the ability to take a step back to lead strategic dialogue better. While reflecting on his firm's strategic positioning in the market, Rupert had first discussed his vision with each one of his partners, who all agreed that the way forward was to move upmarket, making the firm "a high-standards, strategic management consulting firm focused on thought leadership." This was a political, coalition-building play that needed strong aspiration and closely aligned interests. While reaching broad agreement on this strong yet so far rather fuzzy idea, Rupert realized that one of his young partners, Philip, could offer exceptional strategic input. He therefore decided to entrust him with leading a series of strategic meetings—at which Rupert would be a simple participant—to discuss how his vision could be concretized by a proper allocation of resources. The meetings were well prepared, and backed up by extensive analysis of the market, resources, clients of the firm, and so on. From the outset, adopting a role of advisor, Philip stipulated that the meetings should be "frank and open conversations on the actions that should be undertaken" and that "everyone would have a chance to speak." When Rupert's idea of investing in the development of a new performance measurement tool was contested, he welcomed the pushback. When he realized that two of the partners had a hard time adopting an argumentative communication style and were challenging Philip for political reasons, he used all his influence to create a smaller strategic committee in which these partners would have no say. Following Philip's input, the team decided to develop their expertise in a new industry by acquiring smaller competitors, investing in R&D, and recruiting two new partners with specific profiles. Although

he didn't play the primary role at every stage, Rupert was ultimately convinced that the team had collectively reached the best decision they could.

Conclusion

Strategy meetings are often frustratingly inefficient and confusing. But the good news is that executives *can* do something about it. If they take a step back and reflect on the way they engage in dialogue, they can prepare in advance and make the most of their interactions with team members. What they need to do is make sure that the decision purpose of dialogue, the communication style, and the leadership role are aligned. In other words, they need to take the time to figure out *what* they need to talk about, *how* they want to talk about it, and *who* should be doing the talking. While it is crucial to form a coalition (politics) and deploy actions in context (tactics), these two decision purposes are distinct from strategy, and require their own communication style and leadership role. Table 3 sums up the main elements of the focus-adjust cast model.
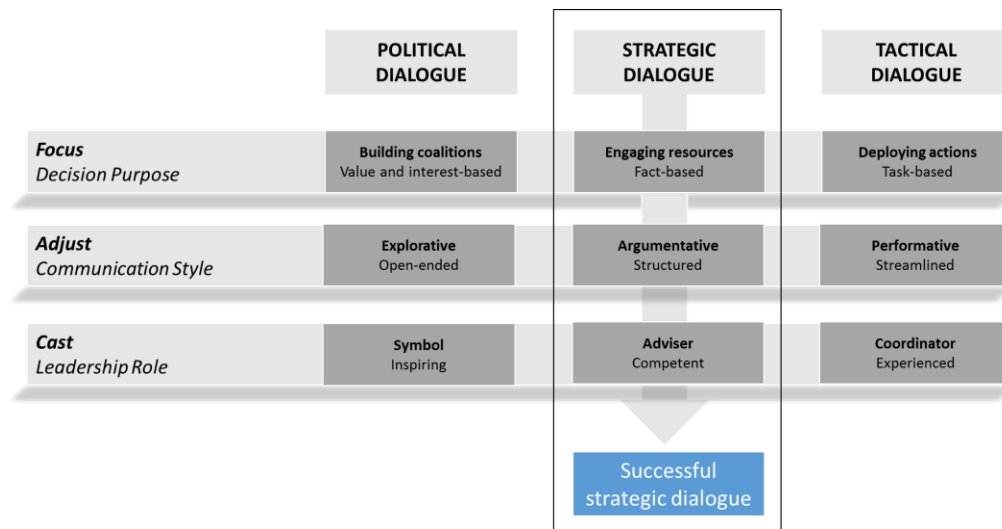
	POLITICAL DIALOGUE	STRATEGIC DIALOGUE	TACTICAL DIALOGUE
Focus *Decision Purpose*	Building coalitions Value and interest-based	Engaging resources Fact-based	Deploying actions Task-based
Adjust *Communication Style*	Explorative Open-ended	Argumentative Structured	Performative Streamlined
Cast *Leadership Role*	Symbol Inspiring	Adviser Competent	Coordinator Experienced
		Successful strategic dialogue	

Table 3: Aligning the three pillars of strategic dialogue with the focus-adjust-cast model

This is not to say, though, that executives should disregard politics and tactics altogether. All too often, strategy is overlooked or confused with the other decision purposes. But it can only be successful if, upstream, the work of politics has been accomplished to secure a team and resources, and if, downstream, decisions are carried out by skilled tacticians. Without a team and resources, strategy is but a dream; without execution, it is merely a moot point. While strategy is a specific form of dialogue, it is also part of a greater conversation.

As we engage in dialogue, we must presume that others mean well and have the success of the business at heart. Arguably, this is not always the case, and people may intentionally mix up politics, strategy, and tactics to obstruct conversations or to pull the blanket towards their short-term interests. However, if we know how dialogue works, we may be better at detecting such attempts to hijack dialogue and divert it from its genuinely creative potential. By analytically separating politics, strategy, and tactics, and highlighting the need to adapt communication and leadership to each of them, the focus-adjust-cast model also draws attention to the possibility of misalignments—whether they are unintentional, deliberate, or outright manipulative.

Dialogue, in its deepest sense, supposes an ethical responsibility on the part of those who engage into it. No matter how good a model may be, it is not a substitute for each person's duty to listen to others, and to *respond* to their concerns—that is the etymological root of "responsibility." This means that the focus-adjust-cast model must be put to the test with real-life dialogue, and attuned to its dynamics and demands. Indeed, we must always remember that the greatest asset to strategy may be the diversity of those around the table, and the many flavours of their creativity.

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