A realistic approach to strategic thinking and acting

EDSON ANTUNES QUARESMA JÚNIOR
INSTITUTO FEDERAL DE EDUCAÇÃO CIÊNCIA E TECNOLOGIA DO NORTE DE MINAS GERAIS, SALINAS – MG, BRAZIL

Abstract
Coming from a split between thinking and acting, the trend of strategy as a practice seeks to connect micro/macro dimensions and link structure to agency. Due to this issue, it is argued that the trend may receive contributions from critical realism. Thus, this theoretical essay aims to establish a relation between thinking and acting in the field of research on strategy, by means of critical realism. Analyzing the reasons to separate schools, the first finding of this study was clarifying the use of discursive strategies in the field, obvious due to prioritization of moments when concepts of thinking and acting are used by each school. Moreover, a solenoid model was proposed, with cyclical connections among practice, practitioner, and praxis. However, besides the proposal, the strategy field may advance through a detailed view of structures/practices and agency/praxis, since the model has, at its core, the practitioner.

Keywords: Strategic thinking. Strategic action. Strategy as a practice. Critical realism. Agency/structure.

Uma abordagem realista para o pensamento e a ação na estratégia

Resumo
Vindo de uma cisão entre pensamento e ação, a corrente da estratégia como prática tenta conectar dimensões micro/macro e vincular estrutura e agência. Devido a essa questão, argumenta-se que a corrente pode receber contribuições do realismo crítico. Assim, o objetivo deste ensaio teórico é estabelecer uma relação entre o pensamento e as ações no campo da estratégia, por meio do realismo crítico. Analisando as razões para separação de escolas, o primeiro resultado deste estudo foi a elucidação do uso de estratégias discursivas no campo, claras pelas priorizações de momentos para a utilização dos conceitos de pensamento e ação por cada escola. Além disso, foi proposto um modelo solenoide, de conexões cíclicas entre a prática, praticante e praxis. No entanto, além da proposta, o campo de estratégia pode avançar com uma visão detalhada das estruturas/práticas e agência/práxis, como o modelo tem no centro o praticante.


Un enfoque realista de pensamiento y acción en estrategia

Resumen
Viniendo de una división entre pensamiento y acción, la corriente de la estrategia como práctica intenta conectarse las dimensiones micro/macro y vincular la estructura con la agencia. Debido a este tipo de proposiciones, se argumenta que la corriente puede recibir contribuciones del realismo crítico. El objetivo de este ensayo teórico es el de establecer una relación entre el pensamiento y la acción en el campo de la estrategia, a través del realismo crítico. Analizando las razones de la separación de las escuelas, el primer resultado de este estudio fue determinar el uso de estrategias discursivas en el campo, desactivar la priorización de los tiempos para el uso de los conceptos de pensamiento y de acción por cada escuela. Además, se propuso un modelo solenoide, conteniendo conexiones cíclicas entre la práctica, el practicante y la praxis. Además de la propuesta, el campo de la estrategia puede llegar a una descripción detallada de las estructuras / prácticas y agencias / praxis, ya que el modelo tiene en su centro, el practicante.

INTRODUCING THE QUESTIONS ON ANALYSE FROM THE RESEARCH ON STRATEGY

From the early 1970s, one can argue about a split within strategy field, between a strategic planning (that aims something to be reached) and a realized strategy that just can be interpreted. The contrast on those moments, can be recognized between ‘intended and realized’ strategies (MINTZBERG, 1978). The question was put between bureaucratically, organized and coherent versus incremental and disjointed strategic decisions. Critiques as Mintzberg, Raisinghani, and Théorêt (1976) call attention to the irregularity of strategic decisions, something different from ordered, integrated and propositional plan (ANSOFF, 1965).

Nowadays, after a journey of discussions between the classical and analytical versus the processual and synthetic strategic thinking, a third stream of research, so-called Strategy-as-Practice (SAP) emerged as an attempt to questioning the very split instead of contribute for the division. Thus, one of the characteristics of SAP is the attempt to connect micro\ macro and to link structure and agency (WHITTINGTON, 2012). It is argued that the stream can advance even more if receive contributions of Critical Realism (CR), that has consolidated developments on the attempt to connect structure and agency (FLEETWOOD, 2014).

Thus, the aim of this theoretical essay is to create a relationship between thinking and acting in strategy, through Critical Realism (CR). The approach has potential for new possibilities when comes to organizations but few contributions in national strategy research. Following the first steps of Archer’s (1995) relationship between agency and structure, it is argued that CR is also able to make links between streams of strategy research. By this way, the “reality” of any strategy

---

is mediated by interpretations of it. Thus, the strategic plan goes through knowledge and practices of each organization level. It passes through individual’s interpretation of an empirical world, and becomes again real actions.

However, before a connection between planning and acting is important to take one step back. The referred step follows this introduction and is able to historicize the discussion. Thus, it is essential, regarding that many attempts of mapping the field are able to putting scholars inside groups and, by doing so, reasoning for separation of the very field were SAP emerges, as an attempt to connect. Many of the meta-analysis known and with big impact, as Mintzberg (1987), Mintzberg, Ahlstrand and Lampel (2010), Rajagopalan and Spreitzer (1996), Whittington (2002) and Chaffee (1985), were observed, in order to product a better understanding of the divergences. Thus, instead of creating another meta-analysis looking on papers of the field, the attempt was to observe in the existing meta-analysis, justifications for convergences of “schools of strategy”. Likewise, the reasons for connections between groups were used to understand what is accepted to split them. This initial analysis showed an epistemological disparity: positivism / functionalism versus interpretativism.

After elucidating the dispute more broadly, the analysis has gone more strict but deeper, following the critiques of the classic view, so-called Strategic Planning until the proposal of SAP. The former is an older stream, with many and important authors. The last, as critical field, has emerged with force, to the point of being related with a “practical turn” in strategy.

After that, CR is presented and some connections elucidated. The culmination of the connection relies, however in the Solenoid Model, based in CR. To reaching this point, the focus was in the individual process of subjectivation of the empiric, that is, literally, between plans and acts thinking and doing.

The last part presents gains and limits of the proposal. Dealing with individual relations with the world increased the scope of possibilities of usage: from a company with a large number of hierarchical levels to an organization composed of a single person, all are made with humans. In addition, the relation of the subject with the empiric world brought the development of the “Solenoid Model”. Other contributions are the elucidation of usage of interpretativism and functionalism in the work of those who divide the strategy into distinct “schools”, and the connection of critical realism with strategy, which brings to a possibility of inclusions of relationship between practice and planning in strategy.

DISCURSIVE STRATEGIES ON THE STRATEGY FIELD

To better understand the field of research on strategy, the proposal is an analysis of the meta-analysis made by Mintzberg (1987), Mintzberg, Ahlstrand and Lampel research in strategy (2010), Rajagopalan and Spreitzer (1996), Whittington (2002) and Chaffee (1985).

Mintzberg (1987), perceives five definitions. Accordingly, the strategy is seen as plan, ploy, pattern, position and perspective. In the first definitions, an intention is the main drive: its realization represents a flux of acts that aim something. In this view, a plan delimits an action course, a guideline. This plan can be a ploy, a way to show something different of the purposes intended by another competitor. The third way to observe is considering that one follows a pattern during the actions. In this manner, when one looks back and see a group of coherent actions, will perceive that there was a pattern there. The two final ways of conceive strategy translate it as a contextual concept. As position, there is a representation of the organization in the environment, an image of the company’s position considering market and the competitors. When the strategy is defined as perspective, it represents an abstraction that is shared by company members through the intentions or actions.

The five P’s of the strategy, introduced by Mintzberg (1987), is developed in posterior work, realized by Mintzberg, Ahlstrand and Lampel (2010). They search a critical reflection that passes for several “schools” of the strategic thought: design; planning; positioning; entrepreneurial; cognitive; learning; power; cultural; environmental; configuration. According the authors division, the first three focalized how must be formulated the strategies, and after that, on prescribe how strategies must be realized. The following schools are interested in specific characteristics of the strategy and search to describe. In this way, the second division of researchers looks on how the strategy is, instead of defining how it would be.
Following the analysis, Rajagopalan and Spreitzer (1996) made the next meta-analysis by examining strategical changes. They claim for two main divisions in researches, one focalized in the content and the other on processes. The belief is that during strategical changes, companies will assume three ways, qualities or status, to align with environment: rational, learning’s and cognitive. At the first division, the problems were demarcated strictly, and the change was translated in search for optimization of solutions made in a planned and sequential form. In the learning perspective, are realized little steps within series, and each one aims to learn more about the Company environment. Changes occur then, through an interactive process. Rajagopalan and Spreitzer (1996) finalize their analysis, showing the cognitive viewpoint that differs by the emphasis on interpretation. The strategical changes happens due to the cognition and realized actions, that in turn, are influenced by the organizational and environmental context.

The authors looks like constricted to the notion that an organization always aims an arrangement with the environment, and in a managerialist approach (that puts itself an analysis bias), through the main problem of research: “How can managers influence the change process to realize desired outcomes?” (RAJAGOPALAN and SPREITZER, 1996, p. 49). Their conclusion shows some basis for division. There, are, at the last part, a summary of rational, learning and cognitive perspectives, made by the authors who connect these perspectives with ideas of content and process, translated as: Level of Analysis, centered on the relationship between company and environment or in the individual managers behavior; Construct Definitions, mentioning the use of indicators that search certain magnificence or a comparison/validation; Operational Measures of Managerial Cognitions and Actions, that are expressed through perceptions of the organizational and environmental conditions as opportunities or threats and the perceptions about necessity and ability to the change; and Combining Managerial and External Frames of Reference.

The dimension presented by Whittington (2002) groups the strategy in four perspectives: classical, evolutionary, processual and systemic. The classical way, would be the most ancient and influent, take in account an extreme rationalism, translated in a planning that would get control over an external environment. Operate a typical separation between hands and brain, between strategy and its execution, between thoughts and reality.

The evolutionary approach that flirts with the Darwinist logical, substitute the biological environment by the organizational. Thus, it considers the possibility of different species being in a same extract of the organizational population, but competing for the same resources. Hence, institutions have to do experiences with little initiatives that would have to be implemented or rejected. It is a question of to adapt and prosper or not to adapt and die.

Processual approach emphasizes the contingencial, disordered and imperfect way of the organizational reality. It considers that one cannot understand all possibilities inherent to the action, and managers’ limited rationality. Thus, strategy emerges disordered, as dealing with the internal and external contingencies of organizational quotidian. By this way, decisions are incremental and can search for improvement, but it is always believed on trial and error, and the risk taken can deal to creative and innovative ways, as well as failure, related to the initial purposes.

Systemic approach take in consideration political and social characteristics that organization has to deal for strategic definition. It believes that before a rational decision, there is a social system that will influence in strategy, due to sociopolitical and contingencial conditions. By this side, one can see a relativist atmosphere, when it comes through goals and strategy ways. The decision is decisively embedded in cultures and systems of power in which is subscribed.

Whittington’s division (2002) is grounded on two basis: building process strategies and the results coming from them for its posterior classification. For the author, in terms of results, classical and evolutionary approaches looks for maximization of profits. Therefore, the others admit different effects besides monetary results. In relation to process, classical and systemic perspectives join at the possibility of deliberated strategy, but those evolutionists and processualists will see emergent dynamics and processes guided by chance and disorder, many times originated by the own conservativism.

At last but not least, Chaffee’s study (1985) perceive the junction between environment and organization, in which the second uses strategy aiming to work with the first. The author treats three strategy models: linear, adaptive and
interpretative. Initially created for organizations with economic goals, linear shape defines strategy by long time goals, and the organization and its repass by sequential actions. Therefore, there would be a group of decisions and actions integrated around resources, to search fixed goals. In this way, the plans are converted in tactical and operational actions and, to do so, the organization needs to be relatively connected, aligned, coupled.

The adaptive model is based primarily in a biological metaphor of organizations, and differs from the others in some ways, such as: monitoring as well as realization of changes are continuous, there is no clear demarcation of temporal distance between planning and execution; there is a bigger emphasis on the performance and not in the searched goals; it incorporates a bigger series of nuances (besides goods or markets) less focused in integration, centralization and planning; it considers the environment (tendencies, events, competitors, stakeholders, and so on) less predictable. In addition, environment is perceived as a complex system of support to organizational life, and their frontiers related to an organization more permeable. Being intermediary, the adaptive perspective approaches the previous one in realization of changes, a function of adaptation with certain final (even if the focus is on means for that) and it also approaches the next model, when demands a great mobilization at the environment, that creates an “image” to be interpreted. In the author words: “Adaptive strategy corresponds to the biological level, in that the model calls for the organization to scan, anticipate, and respond to various elements in its environment” (CHAFFEE, 1985, p. 95).

At last, the interpretive model, which the author considers as in construction yet, could be conceptualized as “orienting metaphors or frames of reference that allow organization and his environment to be understood by organizational stakeholders” (CHAFFEE, 1985, p. 93). At this design, strategy depends on communication and symbolic actions, and the organization becomes an agreeing among individuals, aiming the exchange of mutual benefits. As the author’s definition, this model seems the idea of a social contract, and is predominantly discursive.

At the end of her work, Chaffee (1985) assumes that even treating mechanical systems (linear form) or those biological (adaptive model), her exertion is based in Boulding’s work (1956) “General systems theory - the skeleton of science”. And the interpretative model is, as the author concludes, cohesive to the most complex configuration in Boulding’s work (1956): the cultural. However, for this author the systems are subsumed and dependents. Nevertheless, Chaffee (1985) lets some doubts about this question. Even considering the existence of different complexity levels (from mechanical to the adaptive and from this to the interpretive), in which level each one would be met on strategy? When analyse through of each point?

Before trying to answer these questions, it is important to conclude the meta-analysis dimensions of Mintzberg (1987), Mintzberg, Ahlstrand and Lampel (2010), Rajagopalan and Spreitzer (1996), Whittington (2002) and Chaffee (1985) through the Chart 01. This chart was developed in an attempt to elucidate fundamental points used to separate the strategy in groups, which will be addressed on this paper with the vague concept of dimensions.

Initially, in Mintzberg (1987), Mintzberg, Ahlstrand and Lampel (2010), one can perceive the separation among the schools by prescription, description or grouping. In this case, the dimension used aims to cluster the schools that prescribe how must be realized or that describe which are the characteristics of strategy. The last, of configuration, tries to group both. About Rajagopalan and Spreitzer (1996), even operating by the attempt of understand how managers interfere in strategic exchange, the keys dimensions are content and processes.

Whittington (2002) focalizes the processes and outcomes: the author divides the research formatting in strategy among those which search to understand the strategies construction and those ones that search for results. It is important to realize that there is a divergence in terms of the concepts of “process” for Whittington (2002) and Rajagopalan; Spreitzer (1996). While the first describe processes, the formers use this word in an attempt of reach logical sequences that takes to results, something as a group of causes and effects.
A realistic approach to strategic thinking and acting

Edson Antunes Quaresma Júnior

Chart 1

The bases of meta-analysis on strategy

<table>
<thead>
<tr>
<th>Authors</th>
<th>Reference terms of the dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Interpretation</td>
</tr>
<tr>
<td>Rajagopalan and Spreitzer (1996)</td>
<td>Content</td>
</tr>
<tr>
<td>Whittington (2002)</td>
<td>Processes</td>
</tr>
<tr>
<td>Chaffee (1985)</td>
<td>Model Interpretive/Adaptive(^1)</td>
</tr>
</tbody>
</table>

Source: Author’s elaboration.

Finally, on Chaffee (1985), the complexity levels (or dimensions) are observed, with mechanical, adaptive or cultural focus. Nevertheless, although separable, they are subsumed, that is to say, the perspective separates them but puts them together at the same time, as if there were hierarchal levels form where the dimensions would come. In this relative inconsistence, the mechanical dimension would be the beginning, from where emerges the adaptive, and these ones originate and compound the cultural. The ultimate subsumes all of the others, even being different.

What one could observe is that the dimensions are different because they treat about schools, professionals involved in strategy, realized researches and complexity levels but they all come from a common base, formed by certain divergence among different epistemological visions of organizational studies. As one can see in Chart 1, they are, basically, oriented by functionalist and interpretativist prisms. This verification is validated by Birochi, Silva, Domingues et al. (2012) in Brazilians newspapers, from 2001 to 2012. Despite the expressive predominance of second line (78% functionalist and 15% interpretativist), the division is clear. Cruz and Pedrozo (2008), also considered the different positions of research that are usually adopted in studies about strategy as the positivist and interpretativist. However, it is not true that there are only these two divisions. Even on Cruz and Pedrozo (2008), and on Birochi, Silva, Domingues et al. (2012) is clear a divergent possibility in that “dialect” between the function and interpretation. It also can be argued that the strategic plan and action had become more and more associated with the attempt of connection of interpretativist and functionalist views by ideas as “organizing” (WEICK, 1979) and “strategizing” (JARZABKOWSKI, BALOGUN and SEIDL, 2007) or by the advances on Neo-Institutional theory—to an introduction, see on Crubellate Grave and Mendes (2004). In addition, fields as SAP, have advanced on this area, as will be discussed later.

The arguments for the division between positivism and interpretativism have strong power, as they justify the split or the attempts to connect the field, as shown in Chart 1. They have strong and profound roots. When one speaks on the second possibility, based in interpretation, looks more at understanding and describing. It would have sources mainly on Edmund Husserl’s phenomenological works and on Alfred Schütz. Besides them, Harold Garfinkel’s ethnomethodology is present and, according to Czarniawska (2003), the social constructionism. The last covers works as Berger’s and Luckman’s (2006), used widely on organizational studies. Despite the fact that interpretivism can be discussed through distinct basis, Czarniawska (2003) shows that those several approaches can have relations, as social constructionism that would join the phenomenology (European), and pragmatism (North American), approximates to the symbolic interactionism of the ethnomethodology. Moreover, as interpretative, they come from a real world to some reflection or interpretation.

The other side of the discussion is based in Comte (2002) and Descartes (2006). Thus:

\(^1\)As mentioned previously, adaptive model pervades both: functionalist and interpretativist. “Adaptive strategy corresponds to the biological level, in that the model calls for the organization to scan, anticipate, and respond to various elements in its environment” (CHAFFEE, 1985, p. 95).
Following a positivist position involves considering that the object or phenomenon being analysed exists independently of whom is analysing. Subject and object are considered independent, and through this notion, the effort is on isolating the object, to perceive the reality. There is a determinist vision, that is, one looks definitions in objective ways, relations of cause and effect among variables. The path of the scientific knowledge happens through explanation of the reality, through verification criteria (possibilities of empiric verification) confirmability (brings the idea that one cannot say a proposition as universally true, but only that is probable) and the refutability of research hypothesis (one cannot say that a theory is true, but that it is not true, that it is refuted) (CRUZ and PEDROZO, 2008, p. 60 our translation).

In organizational studies, the discussion is nearby Durkheim’s (1971; 1986) positivism. Emphasizing the precise delimitation of object, he sought to do necessary adaptations of social science to the natural science ideal model. A strong relation with the exactness of the contents. One can argues that positivism comes from verification of the criteria based in hypothesis. It reflects some ideas of Kant (1885), for attempt to judge the empiric world in a valid mean, by the a priori. Thus, Durkheim (1971) uses many analogies with the natural science already legitimated, to demonstrate that all of them are resulted of a same synthesis. He looks for legitimation via the common rule standing among the science. Many of these characteristics can be attributed to positivism. Within organizational studies, as demonstrated by Westwood and Clegg (2003), the positivism is related to structural functionalism.

Consequently, one of the main questions that justify the separation inside the field of the research on strategy is a clear discursive dispute, a tension between functionalist and interpretativist views, one coming from real world to interpretations, other from ideal world to the real. However, it is important to show some fear about strong-minded treatments by determinist views, as criticized by Saraiva and Carrieri (2007) and, as Boulding (1956) states, about a hierarchy in complexity of levels, since hierarchy not be used as the level of importance.

In other words, about strategy, one should not put levels of importance but complexity among approaches. In this way, it is important look for results, because organizations need to get them, even if they are not a priority: It should exist some reason for an organization to exist. It can be for example, about the Green Peace, which looks for a better relationship between human beings and nature. It also can be a bank, whose goals is surely stakeholders’ remuneration. Alternatively, an open market, that looks for an approximation between customers and their sellers, shows that all organizative format can have goals. Nevertheless, the fact of having its specific aims brings the necessity of all goal being problematized. Further that, it needs to be understood. When one tries to describe relations among organizative formats understand better how to pursuit goals in a less incoherent way with people and the context, and environment. This one must be a priority issue.

Following in that line, before reinforce divisions, or before being one more who divides, one would rather try to do some considerations on the doubts created by Chaffee (1985): Is it possible to connect the dimensions of interpretivism and functionalism? Is there any way to approach this lines that are supportive to such an influent viewpoints on strategy theory? Some authors have already elucidated vestiges of relation among the currents of thoughts (on a very much wider way than this work will) among them, Paula (2012; 2014), where emerges possibilities of connections among the “paradigms” divided by Burrell and Morgan (1979). As answer, it is made a deeper investigation on the functionalist and interpretativist processes in the next chapter. Following Paula’s example (2012), at chapters 4 and 5 it is suggested a connection of “incoherent” or “incommensurable” strategy streams via CR. To increase the basis for connection, at next chapter the division is investigated, in a deeper effort.

USE OF DISCURSIVE STRATEGIES BY IDEALIST, PROCESSUAL AND SAP GROUPS

As example, it will be stressed the classic and functionalist stream on the strategy field, versus their critiques, that comes closer of an interpretativist approach. The classical format so called ‘strategic planning’ arrived on the scene of organizational studies in the mid-1960s (MINTZBERG, 1994), and set its shape on platonic bases, treated by Reed (2008) as the idea of an a priori idealized structure that must correspond to a strategy. Chandler’s work (1962) is an example. Further
on this search about an *a priori* strategy over organizations, can be perceived in Ansoff (1965), who (i) deals with fixation of corporative strategy, or other authors, where strategy and structure are related to exams of economic variables. Steiner (1969) believes that plans used to the goals establishment need to be practical, based in facts, rational and legitimated by coherence, distinguishing elements for their search.

Some critiques in 1960s and 1970s planning models are related to the overly concern with manipulation of in-house financial data, and to the focus in staff-driven plans (BONN and CHRISTODOULOULOU 1996; WILSON, 1994). Strategic planning, as idealized structure for organizational actions, was accused of been unable to deal with “(a) an environment that changes continuously but irregularly (...); (b) an organizational operating system, or bureaucracy, that, above all, seeks to stabilize its actions (...); and (c) a leadership whose role is to mediate between these two forces (...)” (MINTZBERG, 1978, p. 72).

In answer to these critiques from the strategic planning academicians can be seen at next periods an “(...) increasing emphasis on the externalities of the business and changing the place of planning responsibility within the company (...)” (WILSON, 1994, p. 14). In addition, an emphasis on new methodologies, (WILSON, 1994) and a better orchestration of resources to improve competitive advantages (BONN and CHRISTODOULOULOU, 1996). Souza (2011) argues that comes from the classic process a posterior structuration, with tools fixed by consulting firms (as BCG that develops matrix growth-share) and concepts created by academicians, as the example of Porter’s Five Forces Model (1996). Wilson (1994) agree with this view, reasoning that search for planning continued, looking now for improve the effectiveness of the content and the process of strategic planning. One example is the attempts to manage the culture, seen as an important set for strategy (BONN and CHRISTODOULOULOU, 1996; WILSON, 1994).

Not surprisingly, the target of improve effectiveness, at some moment started to label strategic planning as management tool (BONN and CHRISTODOULOULOU 1996; KICH; PEREIRA 2014; WILSON, 1994), and after, as an earliest version, or a non-evolved version of the strategic thinking (HERACLEOUS, 1998; KICH and PEREIRA 2014; MINTZBERG, 1994). This last shift is relevant, because throw on the lights the two main authors that defend each point: “Mintzberg believes that strategic thinking and planning involve distinct thought processes, the former being creative and the latter analytical; whereas Porter believes that strategic thinking is achieved by utilising analytical tools” (HERACLEOUS, 1998, p. 484).This moment is also significant, as brings with it a movement surrounding the concept of strategic thinking, instead of planning.

Following this split between the two main authors, Porter (1996; 1980) views are coherent with the development of concepts and tools that determine companies competitiveness. He treated of strategic choice (designed by “managers”) among executed activities (by lower hierarchy workers), once that some of them are incompatible among themselves. According with the author, differently from the time when many companies operated in a certain distance of the technological border, operational effectiveness is no longer sufficient to drive organizations on long turn continuity of their financial return. It is necessary strategical positioning of organizations. The essence of strategical positioning lies in chosen activities able to differ organizations, in other words: in different activities executed by firms or in the same activities, but executed in a different way.

Therefore, Companies’ managers must look for the creation of a unique and valuable position, according to the combination of activities. Consequently, it is necessary the “strategist’s” choice among executed activities, once that some activities are incompatible among them. A focus of this choice is on the planned fit among activities executed by the company. As the author defines, “fit has to do with the ways a company’s activities interact and reinforce one another” (PORTER, 2013 [1996], p. 3).

Fit of activities is not only a way to find its strategical position, since “(...) strategical competition can be thought of as the process of perceiving new positions that woo customers from established positions or draw new customers into the market” (PORTER, 2013[1996], p. 8), but also a way to maintain sustainability of advantages. Thus, strategical positions(... should have a horizon of a decade or more, not of a single planning cycle. Continuity fosters improvements in individual activities and the fit across activities, allowing an organization to build unique capabilities and skills tailored to its strategy (PORTER, 2013 [1996], p. 17).
According to the author, there is necessity to maintain a horizon where exchanges must be oriented by cycles of pre-defined planning, where the company position needs to be meticulously thought. And this detail, defined by “strategist’s” ponderation, must prevention change and maintain stability, once that

(...) frequent shifts in positioning are costly. Not only must a company reconfigure individual activities, but it must also realign entire systems. Some activities may never catch up to the vacillating strategy. The inevitable result of frequent shifts in strategy, or of failure to choose a distinct position in the first place, is “me-too” or hedged activity configurations, inconsistencies across functions, and organizational dissonance (PORTER, 2013 [1996], p. 17).

In this sense, what depends of each strategist in his company would not be a definition of what is strategy but how manage organizational activities and its changes, to a point that not interfere in strategy that must be stable for decades. Who plans may choose distinct positions relative to other competitors, which have to be transmitted on the interior of the organization without generating dissonance among activities, inconsistence among functions.

One can also argue that Porter continues inside of the classical though. Other authors of this vertent are Ansoff and McDonnell (1993), who treat strategy as a background of rules for decision take, made to drive the actions of an organization (ANSOFF and MCDONNELL, 1993). In recent publications, Porter and Heppelmann (2014, p. 76) are stressing the “sustainable competitive advantage in a shifting industry structure” through the same roots: “The basic tenets of strategy still apply. To achieve competitive advantage, a company must be able to differentiate itself and thus command a price premium, operate at a lower cost than its rivals, or both. This allows for superior profitability and growth relative to the industry average”.

It is important to notice that is not argued on this paper whereas Porter (2013 [1996]) or Porter and Heppelmann (2014) are wrong or right. In fact, it is understudied that his view is also applicable for the proposal developed here. What is relevant, otherwise, is that reigns a platonic basis in classical (thinking or planning?) strategies, that is characterized by a “(...) systematic integration searching, order and control reached by conceptual extreme abstraction, simplification and generalization” (REED, 2008, p. 69). For Canhada and Rese (2009), this way of observe strategy, also illustrated in Andrews (2005), delineates more than an adjustment between environment and organization but a kind of patterns, decisions and purposes, which would involve all company levels. Canhada and Rese (2009) calls attention, however, to the decisions pattern and purposes defined in specific place, that demands being repassed.

True to the scientific management pioneered by Frederick Taylor, this one best way involved separating thinking from doing and creating a new function staffed by specialists: strategic planners. Planning systems were expected to produce the best strategies as well as step-by-step instructions for carrying out those strategies so that the doers, the managers of businesses, could not get them wrong (MINTZBERG, 2004, p. 107).

This structure can be seen on Porter, (2013 [1996]). For instance, at the two last literal quotes related to the author, one can state for the separation among an organizational level or “a company” that “reconfigure individual activities”, or “realign entire systems” to “build unique capabilities and skills tailored to its strategy”. There is thus, a dissociation between the company that “reconfigures” and skills\individual capacities: the former “reconfigures”, or some activities “may never catch up”. This separation can be seen as between thought and action, or formulation and implementation, and takes authors as Andrews (2006) and other from prescriptive schools being criticized (CANHADA and RESE, 2009).

Micklethwait and Wooldrigde (1998), for example, consider that separation between thoughts and action distances activities related to strategy elaboration of front line workers that have accentuated knowledge. From 1960’s to 1980’s, the content (substantive knowledge), the process (procedural knowledge) and the models of business strategy was based in Cartesian paradigm (CALORI, 1998), or cogitus cartesiano of Descartes (2006). “I think therefore I am”, establishes precedence, in terms of thoughts relevance over the action, or a philosopher prejudice announced by the grammatical proper form that uses to express, of the subject over the object (NIETZSCHIE, 2005). As exemplified on chapter 2, this line connects together studies about organizations, in positivism and functionalism. However, it is also necessary a separation between Descartes (2006) and the platonic thought. The difference is in the movement that speaks about being and the other, treated by
A realistic approach to strategic thinking and acting

Edson Antunes Quaresma Júnior


Souza (2011) delineates this path. Having as fundament the structuration theory, he perceives a configuration of different stages and manners of strategy, in a case study where changes configure different moments of practice application. What Foucault (2006) tries to express—and that has big influence of Nietzsche (2005)—is the condition of access to knowledge and consequently, to the truth, by the subject. If before the individual would advocate to know himself and work on himself, the Cartesian thought would be defined as knowledge of a set of objects (and not from individual over himself). Relevant question to separation between subject and object, deflagrated by modern science and reflected on the division between hands and brain on the organizational studies. It is also a good reason to call this movement by the poor in creativity label, of “idealizing”.

One could say, based in classical authors, that there is a differentiation in relation to the CR notion, with is related to Aristotelian thought (REED, 2008), and theories that underlie the platonistic thought, with also stand in some extent, from those Cartesian. However, independent of difference between, ontic/ontological analyses, those theories of “idealizing” order, can be present today through managements discourses and strategists’ practice. As such, everyday bricolage was “(...) constructed in bases related to all that historical construction of the theories about strategy” (CANHADA and RESE, 2009, p. 275 our translation).

Besides that, as much as exists other influential critical lines than that presented here, one cannot say that each school of thought has surmounted the last ones, and a large amount of them continue guiding strategies, researches and practices at the same time (CANHADA and RESE, 2009). The idealizing theories serve of reference to several strategists in action, and when looks for relations between think and act, one cannot deny the first one. In other words, the theory set can be an empiric part that some strategist uses to orientate the praxis. Saraiva and Carrieri (2007), demonstrate that those approaches are focused in operational target, due to certain exigency for applicability in the future.

Anyway, as Volberda (2004) argues, classical perspective considers strategy like a formal planning process, executed deliberately, inaugurated in higher hierarch layers. It is based strongly in industrial analysis, elaborated rationally, and searches coherent organizational strategy development, conscious and ambitious. However, within the very concept of strategic thinking, there are other views. For instance, Mintzberg is more emphatic about “(...) the dynamic process by which strategies are arrived at” (HERACLEOUS, 1998, p. 485). This stream is opposed to formulation process of strategies style “top-down” (KNIGHTS and MORGAN, 1991).

This stream, so-called “processual”, distances itself from platonic and idealist images, and of Cartesian separation between body and mind (or between planning and execution) returning to explanations that consider ideas of tension and flux. For instance, tension between deliberated and emergent strategies that will only permit the comprehension of the process a posteriori (MINTZBERG and WATERS, 1985). This stream of thinkers joins clearly to a current that is distant of the first one. They are focused in the past, because interpretation demands that strategy had happened. Based in empiric authors, they find in Epicure and Aristotle, and after in Francis Bacon and John Locke, some fundamental questions. “Locke fought against the Cartesian doctrine, and saw the mind as a ‘tabula rasa’ where experience leaves its print: reason is guided by senses” (CALORI, 1998, p. 287).

Souza (2011) delineates this path. Having as fundament the structuration theory, he perceives a configuration of different stages and manners of strategy, in a case study where changes configure different moments of practice application...
over the years. His conclusion is that “if there is an adequate level of practice formalization of strategical planning in organizations, this level must be defined by practical structuration in its social dynamic” (SOUZA, 2011, p. 856). In process theory of strategy, there are arguments against formalization, bureaucratic theory and management as science (MINTZBERG, 1976; 1978; MINTZBERG, RAISINGHANI and THÉORÊT, 1994), in synthesis against ideological and deductive approaches.

Vision is unavailable to those who cannot “see” with their own eyes. Real strategists get their hands dirty digging for ideas, and real strategies are built from the occasional nuggets they uncover. These are not people who abstract themselves from the daily details; they are the ones who immerse themselves in them while being able to abstract the strategic messages from them. The big picture is painted with little strokes (MINTZBERG, 1994, p. 111).

The process here is the inverse of the classics. However, because this inversion, one can argues that the process has overemphasized the role of the inductive process. On such case, strategies emerge, like “nuggets”, to the ones able to abstract from the places they are immerse. No more from big plans repassed but from “little struggles” to a “big picture”.

This discussion continues in authors such as Jarzabkowski and Seidl (2008), Whittington (2002; 2004; 2006), Whittington (2004), and Jarzabkowski, (2003) who puts strategy as practice and not only as process of abstraction from details. However, those currents (processual and SAP) have so many complementarities, that has been common considering them as a unique movement, with a difference emphasis on theories like structuration theory, neo-structuralism, post-structuralism (CANHADA and RESE, 2009).

From this way, strategy is transformed in a fluid possibility, less joined to posterior structural conditions. It can include “strategizing” ideas proposed by Jarzabkowski, Balogun e Seidl (2007), that are strongly rooted on theories of “organizing” (WEICK, 1979).

Despite of seeing in this paper a possible group component done with the last authors mentioned, it is assumed a broaden proximity (not absolute) with strategy movement of Whittington (1996), where one can perceive practices, practitioners and the Greek concept of praxis:

Accordingly, ‘practices’ will refer to shared routines of behaviour, including traditions, norms and procedures for thinking, acting and using ‘things’, this last in the broadest sense. By contrast, the Greek word ‘praxis’ refers to actual activity, what people do in practice. Practitioners are strategy’s actors, the strategists who both perform this activity and carry its practices. (Whittington, 1996, p. 619).

Another two possibilities of approximation are due to Jarzabkowski (2008) and Chia and Mackay (2007). At the first, appear the “pixels of managerial influence” in whose work Jarzabkowski (2008) demonstrates a relevant question for the analyses that will be developed here: points of “reality” transmitted by “managers”. In addition, Chia and Mackay (2007), tries to go beyond the division between planning and execution. Inside of a bigger movement, so-called “practical turn”, SAP would reformulate relation between agency and structure.

What has been called the ‘practice turn’ in social theory provides this alternative basis for a ‘post-processual’ approach to theorizing strategy-as-practice. This ‘practice turn’ involves a radical reformulation of the intractable problem of agency and structure that enables us to bypass the ‘micro/macro’ distinction so intimately tied to the social sciences in general and to strategy research in particular. Already, there are signs that the discourse of the strategy-as-practice research community reflects this awareness and are thus straining towards some form of ‘trans-individual’ explanation that is not restricted to the mere ‘activities’ of strategy actors nor to the traditional emphasis on macro-structures and processes. (CHIA and MACKAY, 2007, p. 217).
An author mentioned by Chia and Mackay (2007), who can be seen as able to deepen the discussion is De Certeau (2007), for whom micro-actions developed in social environment evidence anonymous practices, tactics of the everyday, related to some strategy. De Certeau (2007) gives the example of the work with scrap, in which some worker transforms creatively, the reject engendered by an industry in something useful. De Certeau (2007) shows that this kind of creation is seen as transgressive, because subtracts time factory that could be used to profitable means. Hence, in the same space divided with machine at which he must serve, the creative constructor “cheats” for simple pleasure to show himself, a personal know how. They act doing “strokes” in spaces circumscribed by rules and procedure ways, new organizations made on formal and planned structures.

There is in De Certeau (2007), a clear attempt to approach the quotidian, through the passage between individual and strategy, between orientated force and subjectivity. It would be additional to this perspective the analytical of power developed in Foucault texts (1992). In these volumes, one can observe a negation of a big power cruel and centralized, that originates from an unique source, that victimizes those ones submitted to its control. Foucault (1992) also calls attention for the power that goes through the subjects. Chia and Mackay (2007) perceive with lucidity this impact among the discoveries made in Michel de Certeau’s and Michel Foucault’s works: an individual micro-actioned impact, specific, singular; and the technologies of power, capillary engendered, aiming a space. According to Souza (2011):

Studies that use this approach search to understand strategy as contextualized activity and socially effectuated, understanding as practice the subjects’ action and different procedures, routines and tools used in its interaction (JARZABKOWSKI, [BALOGUN and SEILD], 2007). Therefore, strategy as practice is an approach that allows the observation of the relation between the micro perspective of the everyday strategist and the macro, based in the perspective of the practices demarcated on strategy elaboration, which possibility to explore how that relation operates (SOUZA, 2011, p. 859 our translation).

Even considering a possible dichotomization between macro and micro levels, present in Souza (2011), his analysis is coherent. Even through a strategic planning, it is necessary to consider beyond of how strategy is done (yet on the first works about strategy as a process, is showed that strategy is influenced by individual features). Quaresma Júnior and Leite-da-Silva (2014) issue also illustrates that point, where strategies of urban management in addition to marketers resistance, creates an inhabited-space, that depends of both. Besides of an hierarchic division to whom plans and who executes there is a demand of analysis about how these lines will be unified through composed relations among several dimensions. This possibility was developed, deepened and amplified in Whittington (2006) as showed in Figure 1, and Jarzabkowski and Spee (2009), on Figure 1.

Figure 1

Integrating Praxis, Practices and Practitioners.

As one can see on figure 1, Whittington (2006) is calling attention for cyclic connections (i, ii, iii, iv, v) where episodes of strategy praxis are realized by practitioners A, B and C, who have shared practices represented by line 3. The author stresses the possibility of connection with an outsider (D), related to other set of practices, represented on line 4.

Jarzabkowski and Spee (2009) relate the research according with three levels of praxis, showed on figure 2: (micro, meso and macro – on vertical column), and three types of participants: individual, internally aggregated to organization and externally aggregated (on horizontal line). In the second case, (... studies distinguish between individual and aggregate actors. Some identify strategy practitioners as individuals, examining data for what an individual did and attributing specific activities to that individual; that is, studying John the CEO or Sally the Finance Director as an individual actor who might act as an individual in interaction with other actors. Other studies identify practitioners as an aggregate actor, a class of actor, such as ‘top management’, ‘middle management’, ‘engineering’ and so forth. (...) Alternatively, a practitioner could be external, meaning categories of actor that might influence the strategy of a focal organization but did not have an allocated hierarchy, line or staff role within that organization’s structural and governance arrangements. External actors include consultants, gurus and institutional actors, such as chamber of industry and commerce, regulators, trade unions, media or other interest groups (such as environmentalists) (JARZABKOWSKI and SPEE, 2009, p. 72).

Figure 2

Typology of strategy studies as practice

In the former group, as the author is dealing in the levels of praxis, strategy practitioners are grouped according to experiences. The dimension micro treats individual or group experiences in an episode, as decision or specific meetings. The groups related to meso set joins studies that try to explain strategy in a (sub) organizational perspective, targeting changes program, the strategy process, or a model of strategic actions. And the macro embraces the institutional environment associated to a specific industry, as it generally tries to explain action patterns of this business agglomerated.

In this way, emerge the quadrants from (A) until (G). The first dominion (A) is about the papers that examined practitioners as individual actors. Set principally with level micro of praxis, a conformation next to very experience of the analyzed person. The second (B), relate to papers that looks on the individual role on organizational or (sub) organizational
praxis. The third (C), make relations between institutional level and individual action. Following this logic, it will emerge the levels of analysis that gathers group experiences of actors, related to levels of specific episodes (as meetings or decisions), of groups or among groups within organization (in level meso); and between actors’ group and industrial sections. At last, it arises works that analyses how actors, external to organizations, change the level micro (of specific episodes); meso (organizations and within sub groups); and macro (sections and conglomerates).

In short, the attempt to understand SAP as divided in praxis and practitioners promoted by Jarzabkowski and Spee (2009) and about practices, praxis and practitioners of Whittington (2006) shows something about the field of research. More than empty words, it stress the large effort to understand each one of the three fields separately and connected by their relations, to the point that the roll field of research can be mapped by de division on searches for practices, praxis and practitioners (VAARA and WHITTINGTON, 2012). Moreover, this “(...) focus on the ways in which actors are enabled by organizational and wider social practices in their decisions and actions provides a distinctive contribution to research on strategic management” (VAARA and WHITTINGTON, 2012, p. 284).

It is argued that SAP have potential to goes beyond previous outcomes, as do not intend to consider a perspective of function versus interpretation but the connections between them. Moreover, as focused in episodes of everyday practices, SAP tend to stress the very moment of the strategy formation, differently of classic theories that focus the future to change actions (or activities) and process that emphasize the past of actions to stress a think. In other words, SAP is attentive to present. However, the very connection between practices, practitioners and praxis shows also the fragility of looking for relations for concepts taken for granted. When does a tool becomes part of a practitioner strategy? When a strategy’s actor is thinking, is acting? What is the border between the praxis and the practice?

The proposal developed here can help to understand better the relation between practices, practitioners and praxis, or between interpretation and action, by stressing their own ontologies. This is the argument of CR.

CRITICAL REALISM AS OTHER POLITIC/EPISTEMOLOGICAL PATH

One of the most important publications about CR in organizational studies was made by Reed (1997). From that moment until now some works had been made. Recently critiques done by Brown (2014) and returned by Fleetwood (2014) (in the same review and number), shows that the movement is now an important field of research with proponents and opponents. However, the seminal work is “The Realist Theory of Science”, from Bhaskar’s (2008 [1975]). The two initial works of the author are marked by a new philosophical proposition in relation to science. Contradictorily, the CR make its claim by separating the real world of the human interpretation of it.

For Sayer (2000), the view presents a challenge to common conceptions of natural and social science simultaneously: “(...) particularly as regards causation, critical realism proposes a way of combining a modified naturalism with a recognition of the necessity of interpretive understanding of meaning in social life” (SAYER, 2000, p. 3).

Bhaskar (2008 [1975]) articulates the empiric world and the interpretation\reflexion (that can be connected respectively –and temporarily– with praxis and practice for empiric and practitioner for the former) about it, but in a different way. The author derives reality in two dimensions: one “transitive”, which treats of knowledge itself and about the meaning attributed to the things; and another intransitive, referring to the essence of things and objects that does not depend of a researcher’s perception (for example) to exist. Thus, in the intransitive world objects contains their proper ontology, which do not depend of the science: this one belongs to the transitive world, the world of epistemology.

In the author’s work, there is also a distinction among: a) what exists, its potentials and structures, which are related with the “real” (being natural or social). In this dimension are situated all mechanisms that regulate the reality of something, ordered in several deep levels; b) the “actual” connected to what happens when potential powers are active. It can treat, for example, of the mechanisms that are in action in determined moment; c) the “empiric”, that expresses the dominion of experience or of what could be experimented, of what is visible, perceptible: the level of reality were some human being has already reached. Consequently, the empiric can refer to real (potentials) and to the actual (something that is effective at determined moment). Because that, one can say that there is a sphere beyond the discursive: however is the
empiric case, there will be always a possibility for some real and effective dimensions, beyond which it could be perceived: one speaks about what was able to absorb but it does not mean that what was absorbed depends on the speaker to exist. Maybe this is an expressive advance in relation to linguistic turn.

Somehow, there is a relation among transitive and intransitive dimensions and the clash between positions of the positivist/functionalist world versus interpretativist at strategy research. Initially, due to the fact that, to the CR, the human being and his exterior can perfectly exist in different dimensions of the reality (possibility seen in science as separation between subject and object). This is a point of critique for authors such as Brown (2014), to whom:

Unlike immediate appearances, the main features of the [capitalist] system (commodities, value, money, capital, wages, profits, etc.) are analytically inseparable – they can only be defined and comprehended together as a unified whole. Consequently, the critical realist ontology of separable structures in interaction hinders comprehension of the capitalist system. In fact, critical realism corrupts an approach termed ‘systematic abstraction’, which can aid system-wide theory. Despite claims to the contrary, critical realism thereby obscures the system-wide significance of local and specific cases, blocking progress in social research. (BROWN, 2014, p. 112).

However, Fleetwood (2014) shows a contrary argument. There is a real (ontic) distinction (separation or hiatus) between agents and structures: they are different classes of thing. This means that the charge of ‘cleaving’ the social world into discrete, separate, un-integratable strata and concepts becomes problematic. On the one hand, agents and structures are different classes of things, making them discrete and separate. On the other hand, however, structures and mechanisms only exist because they are the reproduced or transformed outcome of agents’ actions, thereby integrating structures and mechanisms and agents (FLEETWOOD, 2014, p. 129).

By separating ontically the different classes of things, one can believe that even been complex or different from the human perception, real structures and mechanisms will continue to exist. “(...) while interpretative understanding was an important and necessary feature of any social science, it did not mean that there was no scope for causal explanation” (SAYER, 2000, p. 6). CR states that real exists and can contain causal and independent relations from people, and that all empiric would need a certain “translation” to be taken into transitive world, to the subjective dimension. The first state joins the CR to the positivism but a second assertive leads in opposite direction, related with an interpretative level of reality.

It looks like that, if one can observe a discursive dispute between interpretivism and functionalism on the strategy field, as Cruz and Pedrozo (2008) and Birochi, Silva, Domingues et al. (2012) did, and if could consider that dispute finds a third way via SAP (WHITTINGTON, 2012), analogically exists potential to connect the last with CR. Indeed, can be argued that SAP continues analysing some tools to deals with commodities, value, money, capital, wages, profits, etc. (what can be labelled as practice) but respecting the ontology of practice do not mean that they are not reproduced or transformed outcome of agents (or practitioners) with their praxis.

Considering the contradiction between the two possibilities, what appears through the CR is that they ‘simply’ can be thought integrated, as aims SAP. Moreover, the integration can go through “practices (tools, norms, and procedures of strategic work), praxis (activity involved in strategy-making), and practitioners (actors involved in strategy-making)” (JARZABKOWSKI, BALOGUN and SEIDL, 2007; WHITTINGTON, 2006 opud WHITTINGTON, 2012, p. 287). It is argued that via RC, there is a cyclic connection among those elements: praxis is a translation of the perception of the practitioner. However, this translation becomes, first, part of the transitive world (the world of meanings) as was a perception. To make an example, was elaborated a Cartoon of a fisherman at Figure 3.

As one can observe at Box 1 of Figure 3 the empiric is the visible parcel of the real world, as on the surface the fisherman just can see what the sunrays are letting clear (little fishes). As can be seen in the continuity, the perception of little fishes becomes reflection and a strategy. It is argued that the act of think becomes praxis, as thinks can be acts. Because of that, praxis is related with transitive and intransitive. When it changes (by another translation, as the act or talk) to
the intransitive (the dimension of things—sound waves), it can become a part of the practices that are also intransitive (practices have also two parts). When a practice can be perceived, reflected or interpreted by others, becomes part of the empiric, been so, related to a new wave of the transitive world. On the Figure 3, something occurs between this new wave, because from the strategy of getting a little hook for little fishes, the fisherman got a big hook. When comes to SAP, their components are double: practices and praxis are related to transitive and intransitive world and, because of that, all the cycle is prone for errors (that can also deal to unexpected discovers, as seen at Box 4). Also is the practitioner: as body, intransitive. As think, transitive. As brain, intransitive, as mind, transitive. However, all of components are part of the real. Likewise, the real can be related to actual and empiric.

Faria (2011), tries to transmit the CR theory when uses an iceberg as metaphor, with deeper levels of the real. What the subjects are able to see would be in the empiric level, actual level, or real level. This is also clear on Box 1 of Figure 3, where the fisherman is able to reach with the vision (empiric), just what the light was showing (the little fishes nearby surface) but not their motive (for instance, running way of the big fish—the actual) neither the complex food chain at the lake (potential of the real).

Figure 3

Connection between Critical Realism and Strategy


The Figure 3 also illustrate what Sayer (2000) considers as the local in which casual explanations can be found: not in a model of succession of regular events, nor in laws imposition and general rules, shown through regularities of which can be observed. The events explanation would happen then, through of identification of casual mechanisms, and as they work, and in the discover of if they have been effective and in which conditions.

Therefore, Mingers (2006) emphasizes the necessity for reorientation of fundaments of management science in terms of its philosophy and methodology, that is strongly based in positivist and quantitative paradigm, on search of statistic proofs of generalizing rules. Reed (2008) considers that mainstream is established in Platonic bases, where science have to search timeless and universal patterns, pre-existent forms that would have to orient the social and political crystallization of a pre-existent image. He still suggests that Bhaskar’s work (2008[1975]) would be seen, on a diverse manner, by Aristotelian’s bases. While the last prizes for a socio-political ontology that searches growth, instability, fragmentation and movement, contradiction and tension, Plato is illustrated by elements such as order, stability and harmony, the totality and the equilibrium, the unity.

Basing in Aristotelian’s think, Mingers (2006) supports the necessity of multi methodologies combination, once that for CR, each object has its own ontology, that is spaced and temporarily contextualized, full of disputes. For using a wider organization notion, and aiming strategy as studying, it is necessary to go in the direction of “inter methodologies” sometimes, based in “inter epistemologies”. Maybe to think in relativize the epistemologies (AL-AMOUDI and WILLMONT, 2011) or translate the idea of alter ontologies from the field of the “political alternative ways, that act as constituent forces of social and material transformation in techno science” (PAPADOPOULOS, 2011, p. 177), as one can see due to the usage of the strategies on the field of research. Moreover, it is argued to respect the ontology of objects, looking for ways to know that are able to follow the movement of different extracts, to understand the “(...) complex interaction among objects or entities localized in different levels of the reality that produces new phenomena, innovative or emergent, that can't be derivatives of localized phenomena in none of the reality levels” (REED, 2008, p. 70).
This notion of movement or emergence can be perverted to be analysed as Focaultian event. As shown before, this cyclic movement is able to connect CR and SAP. This goal can be illustrated following another author of relative relevance to the study of CR. Archer (1995), created an approach that treats of change cycles (morphogenesis) and stabilization (morphostasis). Fleetwood (2014) cogitates this analysis as the most sophisticated form to understand the integration between agents and structures. Archer (1995) argues that, about dimensions in movement of determined social context:

(...) Any one cycle (...) is also recognised to be preceded by anterior cycles and followed by posterior ones - whether these are reproductive or transformatory, morphostatic or morphogenetic. Necessarily action is continuous (‘no people: no society’) but because of their actions over time, structures are discontinuous (only relatively enduring) and once they are changed, then subsequent activities are conditioned and shaped quite differently (...) (ARCHER, 1995, p. 154).

Archer’s proposal (1995) is basically translated at the Figure 4, where it is perceived exchanges that occur based on a process mediated by praxis of the agents. Only the structural conditioning can be seen in (T1) – (T2). At this time, prevails perception of an environment that has objects, possibilities and main casual relations, that can be seen as practices. At the following moment (T2) – (T3), happens a socio-cultural interaction, which brings new objects, possibilities and relations. After, (T3) – (T4) presents the answers and possibilities of exchanges (morphogenesis) or objects reproduction (morphostasis).

According to Fleetwood (2014), the morphogenesis and morphostasis dynamics (M-M) could be explained in the following way:

Agents do not create or produce structures and mechanisms ab initio; rather, they reproduce (hence morphostatic) or transform (hence morphogenetic) a set of pre-existing structures and mechanisms. Society continues to exist only because agents continue to reproduce or transform structures and mechanisms. Every action performed requires the pre-existence of structures and mechanisms which agents draw upon, and by drawing upon them, agents reproduce or transform them (FLEETWOOD, 2014, p. 129).

Figure 4

Exchange Process through mediation of practices already structured

<table>
<thead>
<tr>
<th>Structural conditioning</th>
<th>Socio-cultural interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>T1</td>
<td>T2</td>
</tr>
<tr>
<td>Structural elaboration</td>
<td>Structural reproduction</td>
</tr>
<tr>
<td>(morphogenesis)</td>
<td>(morphostasis)</td>
</tr>
<tr>
<td>T3</td>
<td>T4</td>
</tr>
</tbody>
</table>


Archer (1995), by this approach, considers: the relevance of time in interactive processes (that cannot be summarized by this); the possibility of change as well as partial stabilization of conditioning features; certain stability, anterior to the movement of an individual, with structural conditionings or anterior cycles; an analysis about reproduction stages or not, as is perceived on Figure 4, between (T3) – (T4).

Having this initial frame in mind, it is proposed to think strategy as a set of subjective versions of a bigger material and discursive practice, that the individual understand and change because of his own subjectivity. That any person projects and materializes in an environment by acting. On each level of analysis, there are new versions of strategy utilized, resisted, subverted, multiplied. These versions are (re)translated to other levels and organizations. A complex relation that involves the real and the interpreted, the formal version and the ordinary, the subjectivity and objectivity. This is a possibility of convergence between strategy as practice and critical realism.
BETWEEN CRITICAL REALISM AND STRATEGY

The suggestion of connection between critical realism and strategy will use Archer’s (1995) development as starting point, due to characteristics explained before: the consideration about time relevance to exchange/stabilization, as well as “possibilities”, of involved potentials. It also must be considered the questions pointed before: the connection should search positivities, and interpretation\practices, praxis and the practitioner.

At this chapter, it is drawn a frame, called as Solenoid Model (Figure 5), where the practitioner needs to be the pivotal point. However, this is not a rhetorical utilization of humanist theories: the individual is the pith, because all empirical depends of the perception to pass from the dimension of intransitive world to the subject dimension. As illustrated by Figure 3, is necessary to believe in a limited and imperfect subject that, in front of reality is unable to reach it totally (JUNG et al., 1977). Moreover, even if the person had access to all information, human capacity would still be a limit for individual actions (SIMON, 1955). On this way, transitive and intransitive inside of organizational levels are considered in a sphere of translation between on the one hand what the subject can access and on the other, what one can make with what was accessed.

Thus, the process begins with a perception of an environment that has structural conditionings (ARCHER, 1995) and that precedes the subject. In addition, the organizational practices are just part of the real. As elucidate the point “a” of Figure 5, the strategist will receive from senses (audition, vision, etc.) an image of the environment that exist internal or external to the organization. However, it is important to stress this notion of “image” as limited as an interpretation of the real (BHASKAR, 2008[1975]). This perception generates a set of “versions” referent to potential, actual or empiric in determined moment (either real or actual). As Jung et al. (1977) argues, human senses are limits to the perception of the world, and there are unconscious aspects in the perception. When the senses perceive a real phenomenon by visual, auditory or other sensations, one cannot affirm that human being receives or understands all information perceived on a conscious form.

Still according Jung et al. (1977), information is transmitted from real sphere to the mind, where it becomes psychic happening whose nature is unknown to the individual (because psyche cannot know its own substance directly). The experience that was before an indefinite number of unknown factors, have some aspects that we ignore since we do not know neither the extreme nature of matter itself nor the happenings that remained under the threshold of conscience. A parcel is then absorbed subliminally, arising later as a specie of second thought.

The individuals’ perception, according to Penna (1999), is an activity of mediated processes directly triggered by sensation. Mediated processes are brain activities that can maintain excitation begun for a sensorial event after this one has been stopped and thus, permitting that stimulus have its effect later.

Some papers on organizational studies treats perception as an individual answer, in other words, what the subject says or interprets (DOMINGOS and NEIVA, 2014; FELDMAN, BAHAMONDE and BELLIDO, 2014; FREITAS and HOFMANN, 2012; NEIVA and PAZ, 2012). In a diverse version, the proposal developed here brings perception as appropriation of information, the first image that mental arrangement was able to bring of any aspect of reality. The perception that any member of some organization has of any point of the reality is going to mature until the point in which its sensorial apparatus allows. Penna (1999) considers that perceptive process is realized in four stages: physical entrance of energy on system (input); sensorial translation, that means, physical energy conversion in information or in informative message; brain activity (with the impulses that conduct information); and the answer or (output). By this way, perception is a reflex, which acts through two functions, reception and selection.

It is used a fewer notion of the perception, something nearby the two first parts argued by Penna (1999). Just as a step that will occur before any reflection. Before the cognitive element that can conduct the sensation to different places, according to anterior relation that some subject has with object (KRECH and CRUTCHFIELD, 1980). Before stages that would demand reflections, where references and personal beliefs can cause distortions or specific manners to decoding some information (SHETH and SHIMOJO 2001). By this way, perception will be related to the translation of the empirical
entrance of energy in the organic system. Thus, perception as first than any reflexive stage, as the first element of translation of practices into transitive world. It depends on the “hardware” of the body and, because of that, is limited by and part of structural conditionings (sensorial ones) but part of transitive. Compared with critical realism process developed by Archer (1995) and presented on Figure 4, the process delineated until here, comes from the initial moment of morphogenesis (T1), until the point where this one ends, or starts time (T2). It is illustrated, on Figure 5 as the **beginning of reflection** (marked by letter “b” on Figure 5).

From this way of seen perception, the reflection processes start at its last stages. Jung et al. (1977) understands that information that is perceived has in some way a subliminal and unconscious interpretation, and in some way, it will be processed by mind. This reflexive process is followed by or subsumed for what Cooper (1976) describes as the projectability. As such, at the reflection one can find the individual power for project synthesis, codes, means attributed in a dynamical relation with externalities, with this intangible mark that material world can have, some kind of resonance (RIZVI, 2015). Thus, the reflexive process becomes an exchange of constant senses with the context, about grouping and decomposition, about movement of some practitioner.

The reflexive process is seen as a flection point of immediate perception, which was brought by sensations. In the beginning of reflection, the empiric perception passes through cognitive processes, where it collapses with memory, or some knowledge set from anterior experiences, cultural elements, future interests. In other words, perception that physical senses bring from the intransitive will transit by subjectivity, which reflects in perception and in itself. Reflection process in perception can conduct to combat among what senses bring at this moment and what have already brought, on direction of plans or just for nothing. At the end, the reflection can be translated by the human cognition in words, gestures, and so on. The process would begin, as Day (1972) states, by picturing what is going to be communicated. This depends of perception that individual got, based in the contact that the organism will have had with its environment, its internal state and its own posture and movement to be conducted to act (DAY, 1972). In other words, reflection can be connected with translations of the empiric and can be embedded on practices. Nevertheless, as an act, represents the beginning of the praxis but is not a practice, just, a mental representation of it.

Coming from the moment when the person has on mind a reflected image of some empirical information (the point is represented on Figure 5 as the **reflection ending and communication starting** denoted by letter “c”) the practitioner can start to arrange his communication. These moments involve certain physical preparation, gestural position of whom is going to speak, or beginning of transcription realized by computer and its softwares, preparation for realization of a formal document, but it is going only until transcription of reflected image through some way. It can seem irrelevant to think in a physical preparation, but at this very moment, the projectability defined by Cooper (1976) passes to relate with material world. Preparation is related to artifacts and tools full of symbols. Between the choice of make a meeting and sending an email, there is too much of the individual and his reflection, of the available, and of deliberated artifacts, too much of preparation but maybe few seconds (or less than seconds). In addition, compared with SAP, this point starts the second version of the praxis, in which praxis can be part of the empiric of others. This is the turn to the material world, the intransitive and, at same time, to the practice.

From the viewpoint of SAP, the forms and the characteristics of communication presented are extremely important: communication constitutes one of the essential elements in process of creation and transmission of symbolic universe of organization (FLEURY and FISHER, 1996, p. 24). Initially, it is important perceive that it does not limit to verbalization and that every individual perceives communication by a proper way (CHANLAT, 1996). Vergara and Davel (2001) explain that due to the fact that we have received heritages of the Taylorist period, there is an economy in communication and still standpoints of a technical language. This way of communication (related to ideological strategy) is made in a way that expressive discourses and social interchange are considered illegitimate. This is the praxis becoming practices, perpetuating strategies as thinks.
This way to put communication points to the discourse analysis. In other words, behind the crystallization of the strategical discourse, are social effects and intentional or ideological contents (FAIRCLOUGH, 1995; VANDUK, 1998). As this type of approach can show, there are intentions beyond the aimed for a formal communication, which can be revealed by the directions and objects that the same discourse puts as relevant. Furthermore, in the objects that are masked. In this sense, it is relevant to be attentive to realized communication, but also to the silence (ORLANDI, 1992). Communication is raw material for praxis and practice, and can be seen, initially represented by the area between points “c”, “d” and “e”, on Figure 5.

The period of communication related with praxis has in its summit the translation of communication in physical media, marked with letter “d” on Figure 5. From with it becomes practice and no longer praxis. The communication phase pointers to crystallization of the strategy of the practitioner’s reflection at the intransitive world. This means communicate strategy to the stakeholders, being them internal or external of organization. However, communication passes by two physical processes: one is the praxis of talk, write, and so on. Yet, any praxis is followed by practices, as a strange couple an open relationship dependent of technologies: talks-sounds; write-paper; type-paper-virtual page, etc. For instance, a formal planning seen by the idealistic format is communication when is repassed through the hierarchic chain. As such, it can receive a formatting by and leads to construction of subjects (KNIGHTS and MORGAN, 1991). Sometimes these constructions are realized by the individuals over themselves, trough practices of self (FOUCAULT, 1987; 1998; 2006). It has also an expectative of subject construction, for which every dispositive is put in movement.

The transmission will happen and generate the letter “e” presented on Figure 5, which means the empiric for a practitioner of hierarchic ‘level 2’, or for those to whom it was repassed. It is again a practice. In this way the cycle tends to repeat but now with another subjects, that access the discourses now crystallized. If the strategy repassed aims an action upon the action of individuals, it can be seen as a metaphor of the power, and as Foucault (1992) defines, the power is not negative, it is positive. It produces individuals that can also serve as support. To Foucault (1992, p. 183-4 our translation), “(...) the individual is not the other of power: it is one of his first effects. The individual is a power effect and simultaneously, or because of the fact of being an effect, its transmission center. The power passes through the individual he constituted”. Therefore, strategy needs individual subjectivation for, instead of massify, individualize, make each one unique. Individual and strategy are not separated dimensions. They are both between different waves of empirics, they construct themselves in the everyday.

After the communication, there is new movement, a new wave. As showed at Figure 5, those ones who receive the real of strategy (e) are going to perceive it (f), to reflect about it (g), and to communicate (h). After this, communication becomes part of material world (i). It’s important to underline, however, that all elaborations realized by strategists and by the hierarchic level “2”, are also limited: smaller versions, incomplete images, versions that are limited by sensorial capacity, cognitive, communicacional of means and by noise, at last, by human subjectivity and management of everyday (CARRIERI, 2012; CARRIERI; PERDIGÃO and AGUIAR, 2014), by physical environment where they are. Moreover, they are mixed with reflections. It happens even if the process remains a mille of second or a month. In this sense, even observing strategy as reduced by legitimation of an idealist vision, or as happened action, looks like that what should be called of strategy is in the connection, done between practice and praxis and, as such, it is in the same direction of practitioner’s construction. This is the very strategy of the subject: praxis that his subjectivation brings from practices, or a connection between empirics, between what can be seen and said, sense and doing. Strategy is between classical and processual search, intended and realized, interpretation and function.

Consequently, the empiric of strategy, in hierarchic level “2”, will be an “ordinary” version of strategy, which will also succeed stages of reflection, where they are imbricate to subjectivity. In this way, strategy can take two paths inside organization. The first path is in direction to a new hierarchic dimension, probably “inferior” (a repass of information in level “3”). Another possible path is the restart on the hierarchic level 1 (before a new information given by level “2” (can be an actualization about the situation of the market, for instance, clamming for emergent strategies); or in case of correction, of some incorrect thing at the initial plan) where it can be changed. This calls attention for the characteristic of continuity (when is repassed), or for change (when reformulated) taking place at the point (i). Therefore, before this point, a new critical realistic relation is happening: socio-cultural interaction.
A realistic approach to strategic thinking and acting

Edson Antunes Quaresma Júnior


SYNTHESIZING THE STRATEGY ADOPTED

The objective to create a relationship between thinking and acting on strategy through Critical Realism (CR) was daring. The first challenge was about the very concepts of thinking and acting. The second about the connection between the “thoughts” of CR and strategy.

Figure 5

Adapting idealized planning to a critical reality

Source: Author’s elaboration.

The repass of some information among practitioners of hierarchic levels 1 and 2 is considered at the moment (T2) - (T3) of Archer (1995) and between points “b” and “f”. Taking place in hierarchical organizations, the interaction can come also through a bottom-up way, what would transform the empiric of the first practitioners (for instance, a C.E.O.). After initial interaction, considering that the stage comes from transmission by level 1 practitioners until the transmission of the ones that are at level 2, starts the moment (T3) - (T4), responsible either for new objects, possibilities and relations, or by attempt of real reproduction of level 1 practitioner’s strategies. The process will depend of a physical transmission and structuration by the practitioner at level 2 (it can be for example, a verbalization, or a literal “punch on the face” of some stakeholder). Anyway, one cannot assume at (T3) - (T4), a continuity. At this point, the real of strategy will be changed: or will change what the level 1 practitioner perceives, beginning a new cycle at level 1; or a repass attempt to an hierarchic level “3” that will have a new wave of subjective elaborations, with new versions of the strategy against the elaborated initially, or a presentation of the empiric of the strategy to another hierarchic level, or stakeholder from outside company, etc. but not the very version idealized.

The *modus operandi* suggested brings itself a relationship among cognitive process (interpretations) and action (objectived, functional executions) and inscribes in a specific time/space, on each stage. It can be adapted to an organization where there is no formal process, being necessary to that, not to considering more than formal repass of information within organization. The question is only to operate an inclusion or exclusion of a level.
The concepts were taken in a broaden way, as they changed during the history of the knowledge about it, and one can argue that on strategy field of research, the changes started in some decades. To deal with the changes, two steps were taken. The first and more wider, was looking on meta-analysis of the field. They showed reasons for connection between schools were the concepts are used and doing so, exposed also the reasons for separation. As result of the analyses of meta-analyses, can be stated that one of the main strategies used for separation is the choice of think and act as priority. Functionalist schools emphasized the “think”, putting the “real world” as secondary. Another schools, emphasized the strategy as a mere abstraction of the reality. They have an interpretativist view of the real.

Anchored at the first, the second step to deal with the historical changes, more deeper and less broaden, focus on the uses of the discursive strategies. Thus, emerges as different “political” groups, the classic view and the processual school. The former is older and relied on the scientific management, stressing plans and performances of companies. They are connected with the functionalist episteme, looking for the future and tools that enable organizational performance. Moreover, the analyzed school is idealist, as try to impose the think of the “organizational level” into lower levels and activities. The second, emerges as critique to the formalization and the Taylorist view of the classic school of strategy. They argue that just going deep in the real activities can bring coherent visions for organizations. As such, the focus is in the past. SAP emerges as an attempt of the very field, on deal with the historical arguments. The attempt is to connect structures of plans and tools (practice), and agency of the practitioner, during the praxis of everyday life. SAP use theories from outside of the field of research and is more connected with the present moment of strategy. Thus, for the first step, the main results are initially, the evidence of a temporal orientation, accordingly with the adopted view (present, past or future); and the confirmation not of the negation, but of the superposition and the prioritization of the usage of concepts of thinking and acting, with attempts to connect both, by idealistic, processual and SAP groups.

As CR also have analyses trying to better understand connections between structure and agency, it could help analyze the field of research on strategy. To deal with this second challenge, was presented the CR and used the proposal of Archer (1995), as beginning point. The connection realized with CR and strategy had emphasis on SAP, passing through practice and praxis but with focus in the practitioner and his contradictory connection with transitive and intransitive dimensions.

A Solenoid Model was proposed. Nevertheless, beyond the Solenoid Model, the strategy field can advances with a detailed view of structures-practices and agency-praxis. Moreover, praxis and practice are seen deeply and also, as contradictory: both can be seen within transitive and intransitive dimensions. Thus, acting can be analyzed as transitive as strategic thinking and intransitive as materialized via body (on gestures, talks, writings, etc.) and thinking can be intransitive as sensorial perception and as transitive when comes to reflection.

However, both moments have different ontologies when passes from the first to the second and from the second to first. The practitioner is also double: as acting in the material dimension of the world is intransitive; as acting in the transitive dimension is thinking. In addition, can be stated that strategy demands the transitive and intransitive parts of thinks and actions, when comes to the social. On the current state (actual), humankind need largely the material world to connect with other humans.

Thus, answering the question about “when analyze” through each approach: thinking and acts are two parts of the one process, but with different ontologies, that should be understudied with different types of knowledge, because has different types of complexities. From mechanical to the adaptive and from this to the interpretive, strategy can be an answerable question, of transitive and intransitive parts of practices, practitioners and praxis. Thus, as agenda for future research, is suggested an attempt of understand the dimensions of thinking and acting coherently with each ontological moment, to reach further advances in the strategy field but it is also suggested attempts to apply the analysis made to other research fields that have in common transitive and intransitive parts of practices, practitioners and praxis.

Despite the advances, some words about limitations are relevant. Rather than propose the Solenoid Model, the focus of the paper was to present a form of understand the development of strategies. In addition, the model is still under developing. Some problems are due to its simplicity: it is not able to show when perception and reflection occurs simultaneously. The empiric of empiric level 2 can starts any time after the reflection of level 1. A solution can be considering level 1 and the others in parallel but with different empirics. In addition, a last problem is that, as the very CR, the model relies in the reality, level that might need refinement for a comprehensive understand of the mind.
REFERENCES


CARRIÉRI, A. P. *A gestão ordinária*. Tese (Tese para concurso de Prof. Titular) – Faculdade de Administração, Universidade Federal de Minas Gerais, Belo Horizonte, 2012.


A realistic approach to strategic thinking and acting


PAULA, A. P. P. Repensando os estudos organizacionais: o círculo das matrizes epistemológicas e a abordagem freudofrankfurtiana. (Tese para concurso de Prof. Titular) – Faculdade de Administração, Universidade Federal de Minas Gerais, Belo Horizonte, 2012.


