

STRATEGY AS A PRACTICE OF THOUSANDS: THE CASE OF WIKIMEDIA

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INTRODUCTION

Following the recent practice turn (Schatzki, Knorr-Cetina, & Savigny, 2001), the discourse on strategy-as-practice (for recent overviews cf. Golsorkhi, Rouleau, & Seidl, 2010; Jarzabkowski & Kaplan, 2010; Jarzabkowski & Spee, 2009) focuses upon how strategy is actually pursued by actors in organizational contexts. It conceives strategy not as something fixed, but as something that is constantly (re)produced via practices (Floyd & Lane, 2000; Jarzabkowski, Balogun, & Spee, 2007; Johnson, Meling, & Whittington, 2003).

Only rarely, however, external actors are explicitly considered as contributors to intra-organizational strategy-making processes such as in the case of consultants (Hodgkinson, Whittington, Johnson, & Schwarz, 2006). And even when focusing on consultants, these are commonly perceived as being clearly identifiable organizational entities (Mohe & Seidl, 2010). It is against this background that the present study addresses the following guiding research question (Eisenhardt, 1989; Langley, 1999): *How do organizations engage dispersed external actors in their strategy-making processes?*

Addressing this research question, we apply a practice perspective to what we consider to be an extreme case (Yin, 2009) of involving external actors in organizational strategy making: the case of Wikimedia, the organization behind the free online encyclopedia Wikipedia. The Wikimedia strategic planning process lasted about a year (2009/10) and was based upon an open call for participation. Enabled to a large degree by means of wiki technology, thousands of volunteers engaged in this strategy making process.

By elucidating the way this process unfolded, we offer the following contributions to the debate on strategy-as-practice: First, we venture beyond common intra-organizational actors involved in the formulation of an organization's strategy when we reach beyond organizational boundaries by looking at organized publics. Second, we identify the sequence of practices that enables dispersed volunteers to contribute to strategizing both, in bottom-up, collaborative as well as top-down fashion. Third, we call for recognizing the socio-materiality of practices also in the context of strategy as is evidenced by the importance of technology for organizing collective strategy-making practices.

THEORETICAL BACKGROUND

Strategy-as-practice and external actors

We anchor our research in the recent 'practice turn' in organization studies and strategy research (Whittington, 2006) and aim at capturing the way strategy is actually done. This theme has recently gained increasing attention from organization theorists (e.g. Feldman & Orlikowski,

2011; Golsorkhi et al., 2010; Jarzabkowski & Spee, 2009; Schatzki, 2001). In our case, this implies elucidating the way in which globally dispersed volunteers contribute to crafting the overall strategic plan for this organization, i.e. what they actually do during strategizing and organizing (Whittington & Melin, 2003).

For this study we are particularly interested in the strand of research geared towards external actors, which have been comparatively neglected so far (Jarzabkowski & Spee, 2009; Jarzabkowski & Kaplan, 2010). Among the most prominent settings that have been researched are strategizing practices between client organizations and consultancies (Hodgkinson et al., 2006; Molloy & Whittington, 2005).

In these works on strategy-making practices the external actors considered are organizations. This is not surprising, since other organizations constitute an important part of an organization's environment (Perrow, 1991). However, substantial parts of this environment is not organized in the form of 'complete organizations'; rather, different types of 'partial organizations' "use less than all organizational elements" (Ahrne & Brunsson, 2011: 84). As we will illustrate below, we argue that dealing with such organized but not necessarily organizational actors within organizational strategy making deserves scholarly attention.

Organized publics

Already Blau and Scott (1962/2003) recognized the importance of specific and often informally organized groups outside of organizations – so-called "organized publics" – for intra-organizational processes. In the wake of neo-institutional theorizing, the external focus shifted towards the broader and less organized phenomenon of organizational fields (DiMaggio & Powell, 1983; Garud, 2008; Beckert, 2010).

The renewed theoretical interest in "organization outside of organizations" (Ahrne & Brunsson 2011) corresponds nicely with recent empirical studies, which point to the growing importance of external communities for intra-organizational processes such as R&D (von Hippel, 2005; Baldwin, Hienerth, & von Hippel, 2006), organizational learning (Brown & Duguid, 1991; Wenger, 1998) or even production in the case of commercial open source software development (Faraj, Jarvenpaa, & Majchrzak, 2011; Osterloh & Rota, 2007). In these studies, interaction with informal communities that mostly reside outside of the organization support or are even constitutive for core organizational processes. We believe that investigating practices of involving such informal communities in organizational strategizing will provide the grounds for making better informed decisions in such contexts.

Collective Strategizing as a Sociomaterial Practice

Addressing or even including dispersed but organized external actors in organizational strategizing practices highlights the necessity to deal with *materiality* (Leonardi & Barley, 2010) as a feature of any social practice. Also in classical settings for strategizing such as top-management meetings, practices are always sociomaterial in the sense that not only language but also bodies and equipment play a role (Jarzabkowski & Seidl, 2009; Tsoukas, 2010). However, involving external actors in strategy making requires tools or technologies other than standard procedures. Recognizing this importance of specific tools for strategy making therefore puts the materiality of strategy practices at centre stage.

In the realm of strategy-as-practice, the materiality of practices has received only scant attention (for exceptions cf. Kaplan, 2011; Whittington, 2003). Even more generally, Orlikowski (2007: 1444) criticizes that “much of the organizational studies literature disregards or ignores the everyday materiality of organizing”. Feldman and Orlikowski (2011: 9) therefore suggest “studying sociomaterial practices that perform social and material relations together” to comprehend everyday practices.

While this lack of explicitly addressing the issue of materiality may be suboptimal but bearable in most instances of strategy-as-practice research, investigating attempts of including external collectives in organizational strategizing cannot spare such a focus. We argue that not only in the case of Wikimedia presented below but in general collective strategizing requires more sophisticated use of material tools for core strategizing activities.

METHOD

Case Selection

Wikimedia, a charitable organization without personal members, was created as a formal organization to support the communities behind Wikipedia and its sister projects such as Wiktionary (an online dictionary) or Wikinews (a news portal) in June 2003. Having been established in the US, the software behind Wikipedia allowed different language versions from the very beginning, reflected within the formal organizational structure by local “Wikimedia chapter” organizations. Those are membership-based and have to sign a so-called ‘chapter agreement’ to officially become part of the Wikimedia network.

The idea for the “Wikimedia Strategic Plan” was born in early 2009 when the Executive Director, Sue Gardner, decided to develop a strategic plan for the years 2010-2015. In the end, the Wikimedia Strategic Plan had been crafted by more than 1000 volunteers in over 50 languages, resulting in five strategic priorities for the organization (i.e. stabilizing the infrastructure, increasing participation, improving quality, increasing reach and encouraging innovation). Fifteen task forces generated 842 proposals with almost 1500 pages on the strategy wiki, flanked by face-to-face discussions, telephone and IT-mediated communication.

Data Collection

Our analysis is based on three data sources, which comprise (1) observational and archival data from conference venues, (2) 29 semi-structured interviews with members of the Wikimedia organization and volunteer participants that took part in the strategy process, and (3) a broad range of documents and secondary data, often from wikis used as strategy-making tools, which provided background information about the strategy process.

Data Analysis

Our data analysis strategy comprised of three steps, targeting strategy-related practices and pursuing data triangulation. First, we inductively and independently coded all three data sources. In this coding process, we listed practices generally relating to strategy making in the course of the so-called Wikimedia strategy process. In a second step, we brought together our coding results from the three different data sources, checked for inconsistencies and overlaps,

and began to cluster practices into analytical categories. As a third step, we compared our set of practice categories with extant findings in the literature (see Jarzabkowski, 2008).

FINDINGS: ORGANIZING ORGANIZED PUBLICS FOR STRATEGIZING

Our findings of how the Wikimedia engaged in collaborative strategizing are divided into four phases, which we identified via temporal bracketing (Langley, 1999).

Phase 1: Preparing and Staging of the Strategy Process

Initiated by executive director Sue Gardner, ideas on how to pursue such an endeavor were discussed at first within Wikimedia Foundation headquarters only. The understanding among Wikimedia staff was that crafting a strategy in a ‘traditional’ way, i.e. by means of engaging a fixed set of a rather small number of senior Wikimedia foundation staff, was not possible. After this has been acknowledged, the organization hired external consultants to support the overarching process before it engaged with the large number of volunteers.

Phase 2: Organizing Organized Publics

When starting to engage with the volunteers, the role of wiki technology became pivotal. The reason is that Wikimedia subsequently relied on the well-established technology to organize the strategy process. The strategy wiki served as a central source to share and disseminate (intermediate) information and results. Wiki technology allows for collecting a large number of – at this point in time – unstructured suggestions concerning the upcoming strategy of Wikimedia; the same time, wikis provide the means to easily categorize and structure content. As a result, volunteers not only provided 842 different proposals. Based upon our analysis we found that already early in the process the volunteers began to cluster proposals into 12 different categories, ranging from “Improving the content” over “Volunteer support” to “Foundation structure and function”.

Phase 3: Strategizing led by Organized Publics

Due to the globally dispersed base of volunteers, the process was oftentimes prone to failures. This can be related to volunteers who stopped contributing or were not able to actively contribute to (intermediate) outcomes that could be built upon. Thus, also after the initial collection phase, the Wikimedia Foundation continued with calls for participation.

In line with the overarching idea to be as open and transparent as possible, hardly any restrictions were imposed on the task forces who (re)assembled spontaneously. Once the task forces were established and operating, the ensuing proposals on which strategies ought to be pursued by the Wikimedia Foundation needed to be screened. This resulted in consolidating and subsequently implementing the proposals into the overarching strategic plan.

Phase 4: Selecting, Synthesizing and Disseminating the Results

When the task forces generated their respective outputs, the key challenge was to select the most relevant themes. Once again the strategy wiki was critical as it allowed for prioritizing

suggestions. Even more difficult was condensing the proposals in a transparent fashion, as a senior Wikimedia Foundation representative mentioned: “Synthesizing these recommendations into one strategic plan was the hardest part” (Beaudette, 2011). In this final stage, frequent and intensive exchanges between the Wikimedia board and consultants from the Bridgespan Group heavily influenced the final crafting of the strategic plan.

DISCUSSION

Collaborative Strategizing Practices

Our results elucidate how an organization manages its strategizing with a globally dispersed and latently available number of volunteers. What is more, the idiosyncrasy of our case is the observation that the whole strategy process has been laid predominantly – not least content-wise – into the hands of the volunteers (apart from the few additional contributors from professional consultants). This contrasts with previous strategy-as-practice research in two ways: first, our research contributes by introducing organized publics (Blau & Scott, 1962/2003) as a target arena for strategizing. This arena differs, second, from client-consultant interactions (e.g. Hodgkinson et al., 2006; Mohe & Seidl, 2010), where in effect the client retains the right to alter the strategy and/or monitors the same closely in the interaction with the engaged consultancy.

Similar to findings related to open source software (e.g. Osterloh & Rota, 2007) or lead users (e.g. Baldwin et al., 2006), the commitment of the broad base of globally dispersed volunteers is critical for crafting the desired output (here: the five year plan). However, organized publics cannot be managed in the same fashion as intraorganizational settings or client-consultant interactions since clear hierarchical and responsibility structures are missing (Faraj et al., 2011). On the contrary, establishing responsibility structures in the absence of hierarchical structures is part of organizing organized publics in collaborative strategy processes. Therefore it is important to highlight three forms of strategizing that appear generalizable: initiator-led strategizing (here: foundation-led strategizing), collaborative strategizing where both parties interact (here: the Wikimedia Foundation and the organized publics and the external consultancies hired) as well as public-led strategizing (here: community-led strategizing).

Another aspect worth noting is that, although the Wikimedia Foundation and its projects are maintained by a large number of volunteers, it was a challenge to recruit these as participants in a strategy process. Writing an encyclopedic article is different from making strategy for and with organized publics (Blau & Scott, 1962/2003).

A precondition for community members’ ability to monitor the contributions of others in the collaborative process of strategy formulation was the transparency provided by the strategy wiki as the central strategy making tool. The technological transparency features of wikis are however only effective as long as actors make use of them, pointing to the importance of evaluating the sociomaterial character of collaborative strategizing practices.

On the Sociomateriality of Collaborative Strategizing

Inviting organized publics to participate in organizational strategy making is one thing. Actually enabling participation of a globally dispersed base of volunteers and making use of the competences residing outside of the organization is another. Coping with the challenges of organizing outside organizations (Ahrne & Brunsson, 2011) requires different tools than

commonly used in intraorganizational strategizing. Accounting for technological aspects of practicing strategy thus becomes a necessity when analyzing the role of organized publics in strategy making (Feldman & Orlikowski, 2011; Tsoukas, 2010). In the case of Wikimedia, setting up a wiki as a technological platform to support the strategizing activities was the obvious thing to do given the experience of the community in working with this tool. In our case, the Internet represents an instance of the “everyday materiality of organizing” (Orlikowski, 2007: 1444), while the wiki technology illustrates the impact of more specific, strategy-related materiality in form of strategy-making tools.

The wiki was part of core practices in all the different phases of the strategy process described above. At the same time, the wiki automatically provided transparency throughout phases two to four by means of the page history feature, which allowed volunteers to trace back the genealogy of all discussions. The credibility of the Wikimedia Foundation’s transparency claim was thus supported by the technology’s materiality. The intermediate results of the different task forces were made online available via the wiki, allowing users to track the development of the strategic plan. Although surrounding and undocumented face-to-face interactions and Skype exchanges flanked the research process, certainly no important issue existed that was not described in the strategy wiki. Hence, the process of strategy formulation can also be thought of as a communicative process (Spee & Jarzabkowski, 2011) where face-to-face encounters are not necessarily needed.

And while others have emphasized the importance of transparency in strategy making (e.g., Kavanagh & Ashkanasy, 2006), our findings indicate that the *materiality* of transparency matters. At the same time, most volunteers were experienced in this particular, technologically mediated – if not coerced – form of transparency. We do not know whether this technological transparency would have also worked without the majority of contributors being used to it, emphasizing the social in our sociomaterial conception of strategy. Also the default setting that allowed anyone on the Internet to edit all pages in the strategy wiki was more than a mere technological feature but a materialization of the proclaimed openness of the whole strategy process (Orlikowski, 2007).

CONCLUSION

Our research objective was to inquire how an organization organizes its strategy process in the face of relying upon collaboration with organized publics. The results of our study suggest that this is in principle possible, in our case vividly enabled by the sociomateriality (here: in the form of the Internet in general and wiki technology in particular), which is a crucial aspect to be considered as it allows for a platform for collaborative exchange.

REFERENCES AVAILABLE FROM THE AUTHORS