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2014

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Citation for published version (APA):

Lundgren, M., & Blom, M. (2014). *Textual objects and strategizing: The influence of documents as active objects on strategic recursiveness*. Paper presented at Annual Conference EURAM, 2014, Valencia, Italy.

Total number of authors:

2

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Textual objects and strategizing: The influence of documents as active objects on strategic recursiveness

Abstract

In this paper, we explore the role of document as influential objects in strategizing. Especially, we investigate how documents influence strategic recursiveness. By documents we do not restrict ourselves to explicit strategy-related documents (such as plans) but any document that generally talks about the long-term direction of the company. We argue that documents contributes to strategic recursiveness by legitimating courses of action but at the same time delimit future action also by the original authors of the documents. This effect is also self-enhancing over time when more documents are being produced.

Key words: Strategizing, strategy-as-practice, recursiveness, agency

INTRODUCTION

The recognition of recursiveness, meaning ‘the socially accomplished reproduction of sequences of activity and action because the actors involved possess a negotiated sense that one template from their repertoire will address a new situation’ (Clark, 2000:67, cited in Jarzabkowski, 2004:532) is at the heart of social theories of practice, since ‘practice implies repetitive performance in order to become practised’ (Jarzabkowski, 2000:531). It is thus present in theories such as structuration (Giddens, 1984) and habitus (Bourdieu, 1990). Recursiveness also permeates much strategic management literature. According to Jarzabkowski (2004), recursiveness has in relation to strategy been studied at different levels, such as the individual level focusing individual cognition (Cyert & March, 1963, Weick, 1969), the firm/organizational level in terms of path-dependency (Garud & Karnöe, 2001; Greener, 2002), inertia (Rumelt, 1995), resource deepening (Karim & Mitchell, 2000), organizational memory (Walsh & Ungson, 1991), etcetera, and the institutional level focusing for instance issues of isomorphism (DiMaggio & Powell, 1983) and industrial recipes (Spender, 1989). Jarzabkowski (2004) discusses strategic recursiveness as a phenomena arising as a result of social interaction and routinized practices forming structures that both enable and constrain human action. This social order persists over time, since actors both reproduce the structures and draw upon them in order to act. Strategic recursiveness is thus presented as resulting from social structuring, but also cognitive structuring as a relationship between perception, thought and action. What is not dealt with, at least not explicitly, by for instance Jarzabkowski (2004) is the role of *material objects* in relation to strategic recursiveness. Implicitly, path dependence deals with resource deepening behaviour within firms, resources that could also be physical in nature. But more elaborated discussions of

materiality and objects in relation to strategic recursiveness is still lacking in the literature and it is this overall gap that we are trying to address in this paper.

Generally speaking, the fact that also material objects can limit, enable, enact, reinforce and in other ways affect strategies and strategy processes (formulation and implementation) is nevertheless most likely widely recognised by strategy practitioners as well as by many scholars of management and organizations (e.g. Hodgkinson & Wright, 2002; Mansell et al., 2007; Jarzabkowski et al., 2013). Texts within the tradition of the Resource Based View have for a long time highlighted technology and physical assets as important means to achieve competitive advantage (Barney, 1991; Caves, 1980; Wernerfelt, 1984). The more recent stream of literature based on a practice-view on strategy has also recognised and started to explore the importance of 'strategizing material' and 'materializing strategy' (e.g. British Journal of Management's forthcoming special issue). From a more general perspective, sociomateriality and associated issues of how technology, work and organizations are related have been studied from e.g. the influential Actor Network Theory-perspective (Callon, 1986; Latour, 1987) and more recently within the Communicative Constitution of Organization-perspective (Ashcraft et al. 2009; Cooren, 2004; Kuhn, 2008; Rennstam, 2012). It is therefore somewhat surprising to find that recent studies suggest that technology (in a wide sense) still tends to be absent in many influential texts on strategy, management and organizations (Orlikowski & Scott, 2008).

One specifically important form of material object that influences strategies and strategy processes are *textual objects*. Studies have shown the importance of documents such as strategic plans (Spee & Jarzabkowski, 2011; Vaara et al., 2010), strategy tools (Jarrat & Stiles, 2010; Spee

& Jarzabkowski, 2009), PowerPoint slides (Kaplan, 2011), etc. These types of textual objects often *explicitly* relate to the content or the process of strategizing, and one might therefore expect their more or less salient impact on the process and /or outcome of the process. In this paper however, we broaden our interest to include any kind of internally (within the company) produced textual object that could be seen as either the product of strategy work and/or having an influence on such work. What is especially in focus is how documents and documentation influence strategy practitioners' agency, an issue closely related to the 'problem of recursiveness' and adaptive practices (Jarzabkowski, 2004). In this paper, we discuss how documents and the acts of documentation affect not just the implementation of strategies, but also the strategy formulation process per se. We argue that these documents contribute to self-reinforcing strategizing activities and constrict future strategy practices. Thereby, we aim at contributing to the growing knowledge of the effects of material objects, such as documents, on strategizing and strategic recursiveness by addressing the following research question: How do internal documents as textual objects affect strategic recursiveness?

The structure of this paper is as follows: After this brief introduction, a literature review on strategy and documents follows, as well a section on active objects. A discussion on the method used and an analysis of the empirical material then follow. A combined discussion/conclusion section ends the paper.

STRATEGY AND DOCUMENTATION

Texts and documents has, at least implicitly, been object of attention within the strategy discourse for decades. Ever since the origin of the 'planning school' (Mintzberg et al., 1998) with the publication of the seminal work *Corporate strategy* by Igor Ansoff (1965/1988), planning and, indirectly, plans (often in the form of documents) and their implications for strategy have been debated. According to Mintzberg et al. (1998), one of the premises of the planning school was that strategy is to be made explicit in the form of programs and plans of various kinds in order to be implemented. These and other premises of the planning school were criticized by Mintzberg and debated with Ansoff (Mintzberg, 1990; Ansoff, 1991; Mintzberg, 1991) a critique that was later on developed by Mintzberg (1994) and Mintzberg & Lampel (1999). Related to plans, Mintzberg (1994) argues that they can have a guiding function when it comes to the implementation of strategies, rather than in the formulation process and that formal plans can be used to communicate the strategy internally and to create support from important external stakeholders. Similarly, Wall & Wall (1996) argues for a focus on the planning *process* rather than on the plan document, which is regarded merely as the starting point for an ongoing discussion: 'the actual strategy gets formed through this process of responding to a draft plan, questioning it, and modifying it' (Wall & Wall, 1996:10). As we will see later on in this paper, developing strategy by questioning strategy related documents may be both a challenging and, from certain perspectives, an unwanted task.

Following Mintzbergs (1994) substantial critique of the strategic planning perspective, the number of studies has steadily decreased since 1994 (Whittington & Caillaet, 2008). In practice, however, planning is reported to be still in use (Rigby, 2003; Whittington & Caillaet, 2008). The

reasons for this are probably varied, from internal control functions to satisfying external institutional expectations (Whittington, 1993). But planning seems to uphold its position as a central strategic practice and connected to it are various tools, artefacts, documents and text. This has spurred an interest into strategic planning processes and the material artefacts involved from a strategy-as-practice perspective, since it ‘focus on strategy making as it occurs through the actions, interactions and negotiations of multiple actors’ (Jarzabkowski & Balogun, 2009:1256). For instance, Jarzabkowski & Balogun (2009) investigates strategic planning as a contribution to integration and how different units and communities interact and negotiate their positions through their enactment of the strategic planning process. Spee & Jarzabkowski (2011) studies strategic planning as a communicative process where the strategic plan is developed in interplay with talk through acts of recontextualization and decontextualization. These acts infuse the document with authority as well as enable certain actors to have influence on the process on expense of others. The power of strategic texts has also been studied with the help of rhetorical (Eriksson & Lehtimäki, 2001) as well as discourse analysis (see for instance Hardy et al., 2000; Kornberger & Clegg, 2011; Vaara et al., 2004). Vaara et al. (2010), who studies a strategic plan through critical discourse analysis notice for instance that ‘strategy documents serve several purposes: they communicate socially negotiated meanings, legitimate ways of thinking and action delegitimizing others, produce consent but may also trigger resistance, and have all kinds of political and ideological effects, some more apparent than others’ (Vaara et al., 2010:686). It is obviously necessary to recognize that the development of strategic plans, as well as other documents describing or referring to issues that might be labelled ‘strategic’ thus has influence on workplace interactions as well as the continuing strategizing activities. This is a line of reasoning that will be pursued also in this paper.

ACTIVE OBJECTS

As an interpretative frame in this paper we draw upon the notion of ‘active objects’. The idea that objects are more than passive material has been gaining an increased interest in the literature on organizations and organizing (e.g. Knorr-Cetina, 1997; Latour, 2005; Law, 1994; Orlikowski & Scott, 2008). Organizations are here seen as on-going accomplishments, characterized by more or less shared meanings, negotiations and struggles between actors. Objects play a role in organizing as elements that can enable as well as restrict actors’ agency and thereby affect strategic recursiveness: ‘[Objects] influence individual behaviour and attitudes toward organizations’ (Rafaeli & Vilnai-Yavetz, 2004:681). It is however important to bear in mind that different people may interact differently with the same object (Ewenstein & Whyte, 2009), possibly leading to different outcomes, and the agency of an object is situated and might change over time and through space (McGivern & Dopson, 2010). But due to their relative durability (compared to non-material organizational accomplishments such as e.g. talk, gestures, and so forth), objects make society durable (Latour, 1991) and often serve as stabilizers in organizational contexts (Cooren & Fairhurst, 2009; Knorr-Cetina, 1997; Orlikowski, 2007; Rennstam, 2012; Suchman, 2005). Objects should therefore not be seen as mere outputs of organizational processes (such as strategy formulation, which is the focus of this paper), but also as important input to such processes. Objects are infused with human intention and agency, and at the same time prescribe future human intention and agency (Latour, 1995). Objects are thus ‘anthropomorphic in three senses: made by human action, substituting for human action, and shaping human action’ (Geisler, 2001:306).

An important form of objects that influence organizational behaviour is textual objects (Cooren, 2004; Geisler, 2001; Smith, 1984), in this paper somewhat reduced to and treated synonymously to written documents (i.e. not including oral or iconic texts). How textual objects shape human action is for example demonstrated in studies of memos (Yates, 1989), meeting minutes (Holmer Nadesan, 1996), checklists (Bazerman, 1997) and work orders (Winsor, 2000). As already mentioned, several studies have also shown the intended and unintended effects of strategic plans (Spee & Jarzabkowski, 2011; Vaara et al., 2010), strategy tools (Jarrat & Stiles, 2010; Spee & Jarzabkowski, 2009), and PowerPoint slides (Kaplan, 2011) on strategizing activities. Besides the bias towards ‘explicitly strategy-related’ documents (as highlighted in the introduction section), there is also a tendency to reduce the research to focus on ‘what employees or managers do when they produce and use texts, and [that type of research] fails to recognize that texts, on their own, also make a difference’ (Cooren, 2004:374).

The works by Knorr-Cetina (1997; 2001) and Rheinberger (1997) on epistemic objects (also called objects of knowledge or objects of enquiry) do not fail to see that texts (or in their case, objects in general) make a difference on their own. Epistemic objects are things without fixed qualities or stable meanings, ‘but rather open-ended projections oriented to something that does not yet exist, or to what we do not yet know for sure’ (Miettinen & Virkkunen, 2005:438) or even ‘processes and projections rather than definitive things’ (Knorr-Cetina, 1997:3) and characterized by ‘irreducible vagueness’ (Rheinberger 1997). Ewenstein & Whyte (2009:9) describe them as objects of inquiry and pursuit, characterized by ‘lack and incompleteness’. In contrast, technical objects are more well defined, stable (Rheinberger, 1997) and instrumentally used as ‘taken-for-granted equipment and tools’ (Ewenstein & Whyte, 2009:9). The transformation from an

epistemic object to a technical object is the core of scientific work (Engeström & Blackler, 2005; Ewenstein & Whyte, 2009:9) and can be illustrated by the practical example of a car. To the engineers, industry designers, marketing people, controllers, etcetera, a new car to be designed, built and marketed can be understood as an epistemic object (a complex, challenging open-ended problem). To the consumer, the same car can in the next phase be seen as a typical technical object (a tool for transportation and possibly for image/identity work). The two categories are hence mutually exclusive (Ewenstein & Whyte, 2009), but can change status over time and space (McGivern & Dopson, 2010).

In this paper, we will in particular draw on the concepts of epistemic objects and its transformation towards technical objects. Even if most of the original works on the concepts have empirically been conducted within the field of natural science/laboratory science, more recent studies have shown that the concepts also are very fruitful in order to understand knowledge practice, control and agency in organizations (e.g. Ewenstein & Whyte, 2009; Miettinen & Virkkunen, 2005; Rennstam, 2012).

METHOD

Empirically, this paper builds upon an extensive single case study of the Swedish pension funds company KPA AB. KPA AB was chosen because it tried to establish itself as the first all out social responsible investment (Domini, 2001) firm (pensions fund) in the Swedish market. It could therefore be expected that this company, being a forerunner, would encounter special challenges and that their solutions would have an impact on other companies within the same

industry. Another benefit with this choice was that the company, breaking new ground in the Swedish market, had to explain and motivate their strategic approach thoroughly, which produced a substantial amount of texts and documents. The study used a longitudinal inductive approach with an overall aim to follow a strategy renewal process over time and try to depict, describe and interpret the challenges being confronted and solutions made in order to materialize a new strategic intent (Hamel & Prahalad, 1989) into existence.

Data collection

Data was generated through twelve qualitative interviews (Kvale, 1997) with eight people during a period of 3 years. These people were selected through a snowball sampling procedure. During the interviews, however, one interviewee occupied a primary role, being referred to by all the others as the head architect behind the overall strategic process. Because of his formal position, not as a top line manager but as head of strategic development, together with the recognized influence by the other interviewees, his words and reflection seem highly significant for our research. Several of the included quotes in this text therefore belong to him. This is not to say that the views of the other interviewees were insignificant, on the contrary, as we will discuss later. The interviews took between one and two hours and could be described as open and unstructured (Yin, 1989; Fontana & Frey, 2000), often developing into dialogues (Bjerke, 2003). All the interviews were recorded and transcribed word-by-word. Furthermore, data was generated through secondary texts being produced by the company, such as annual reports, different internal and external brochures and web presentations. These texts were gathered during the same period as the interviews and comprise of approximately 400 pages.

Data analysis

The gathered data was structured and analyzed through a grounded theory (Glaser & Strauss, 1967; Strauss & Corbin, 1991) inspired approach. The data was organized around primary categories (Jacobsen, 2002; Merriam, 1994), which was further developed into secondary categories in an iterative process, where the first sequence of data analysis informed further rounds of analysis and interpretation. Moving between relevant literature (based on our research question as presented in the introduction section) and the data, we selected interesting quotes and text episodes that seemed relevant or illustrative. These quotes/episodes were then coded into the following categories: documents, texts, meaning, strategy, strategizing activities, decontextualization, recontextualization. After this exercise, in combination with a second wave of literature studies, new categories emerged (e.g. epistemic objects, technical objects, self-reinforcing, recursiveness) that we included in our analysis.

EMPIRICAL ANALYSIS AND FINDINGS

As previously mentioned, the case forming the empirical base of this paper is the Swedish financial services company KPA AB. The company originates in 1922 and focuses upon managing pension assets placed by employers in the Swedish public sector. Beginning in late 1996, KPA launched an effort to establish itself as an all out social responsible investment firm, meaning for instance that all investment should be made based upon certain ethical and sustainable criteria. The goal was to establish a strong position in the market before the launching of a large pension reform in Sweden opening up for private choices of investors for a portion of the allocated pensions for every employee. From 1998 and onwards, all assets are placed

following ethical and sustainable criteria developed by KPA, criteria that were further developed in the following years. It is the strategic process from 1996 to 2002 that constitutes the object of study in the research reported in this paper.

Dealing with epistemic object(s)

At the end of 1996, a marketing director was employed and given the task to investigate the opportunities to strategically differentiate KPA from other financial companies in Sweden. To contribute to this effort, extensive market research on the company's final customers was performed in order to capture their preferences and interest towards responsible investing. Right from the start, at least retrospectively, the strategizing activities was intimately related to the production of various texts and documents:

Then it became very clear, that this niche is something that these people think is important. I went to England and found out how this (SRI) is done and I had a few meeting and studied the processes. Then it was communicated to the board and they thought it was reasonable so we continued to construct policy documents and descriptions of investment criteria and that is how it developed (marketing director, head of strategic development)

To formulate and communicate the strategic ambition of the company was, however, not without challenges. Some of these challenges can be illustrated with the following quote:

You are going to communicate a message that is constantly changing, something that is not possible. To make the world comprehensible you have to fix certain positions at certain places and that is not easy with a concept like ethics. But a company cannot live like that, you have to find the measurable points, because them you can agree upon based on some form of world view (marketing director, head of strategic development).

The quote illustrates a wish to reduce equivocality (Weick, 1995; 2001) and to stabilize a certain understanding, something that is seen as paramount both for coordinated internal activity and congruent external communication. A special challenge in this work was to formulate the ethical criteria for the investments where clarity in guidelines was considered of very high importance:

You have to consider the formulation very carefully to enclose what you think is problematic to get an effect and to have a possibility to control. Otherwise it is a rather meaningless criterion. We would like to have clear and measurable criteria were we know what we do, that they are as objective as possible and that it is as easy as possible to draw boundaries (ethics analyst).

In this case, the social responsible investment strategy that was aimed for could be understood as an epistemic object as an 'object of inquiry' (Ewenstein & Whyte, 2009:9) in the form of 'open-ended projections oriented to something that does not yet exist or to what we do not know for sure (Miettinen & Virkkunen, 2005:438). The actual form and content of the social responsible investment strategy and how it was to be implemented was at this stage an open questions, characterized by ambiguity and different interests. As a tangible result of the strategy discussions,

meetings and workshops, more or less agreed upon ideas are being formulated within memos, policy documents, information leaflets and website messages. These documents can be seen as artefacts, or objectifications (Hasselbladh, 1994; Hasselbladh & Kallinikos, 2000), being produced to stabilize meaning, that is to fixate a certain understanding of reality, goals and ambitions.

One of the most often mentioned documents being the product of this documentation was referred to as 'Our responsibility' (in Swedish 'Vårt ansvar'), which can be seen as a sort of enhanced mission statement for the business activities. This text was published mainly in the form of a small leaflet, but also republished in other documents. The target audience for the document was wide, including internal employees, customers and other external stakeholders.

The leaflet starts with the following statement:

In February 1998, the board of KPA made a decision that the company will actively work for a better future for humans and environment.

It continues saying that this responsibility includes:

[N]ot only taking a business perspective, but widening this to a broader view that includes a total responsibility towards economy, humans and environment (leaflet 'Vårt ansvar').

The foundation of their principles is said to be the UN Declaration of human rights as well as principles from the International Labour Organization, institutions that are thereby evoked in order to strengthen the legitimacy of the principles. The responsibilities are described in relation to the most important stakeholders and it is said that KPA is actively going to seek partners that share their stated values and to ‘continuously influence and keep a close dialogue with different stakeholders on ethical issues which are of importance for our business’. Furthermore, it states that all employees have a responsibility to follow the decided principles.

To support this effort the company has developed a policy for fair trade, an environmental policy and social responsible investing criteria to guide the investments. The descriptions and explanations of the investment criteria occupy a special position among the different texts. The criteria, being the most obvious realization of the ethical approach of the company, are mentioned, described and explained thoroughly both in physical brochures and on the company web page. Shortly mentioned, the criteria describes and argues for certain areas and companies that KPA will not invest in or areas or companies that they will actively seek to invest in, all based upon ethical and environmental considerations. The criteria descriptions with their delimitations for the investment activities, indicates important elements of how the strategic ambition of the company is being operationalized in the daily activities. The strategic position and direction of the company is further stated, explained, argued for and reproduced in a number of other documents and brochures directed to both external and internal audiences. Those documents includes annual reviews, brochures presenting different investment products to potential customers and a small internal document focusing brand development, stating a number of principles and goals regarding the KPA brand and its future.

From epistemic to technical object and the role of documents

The different documents constitute important textualizations of the company strategy related to different areas and issues. Even though there is extensive cross-referencing among the texts, or perhaps just because of their substantive intertextuality (Kuhn, 2008), they form together a substantive body of meaning. The texts become powerful instruments in the ongoing strategy making activities because of two interrelated reasons. First, by being materialized in text, given official status and being published and distributed internally and externally, the stabilized meaning is distanced from the originators, which makes the texts decontextualized (Spee & Jarzabkowski, 2011). Through textualization, the stabilized meaning develops into quasi-objects and more perpetual, no longer dependent on the actors expressing the words (Hasselbladh, 1994; Spee & Jarzabkowski, 2011). Being objectified, the ideas are also possible to scrutinize and reflect upon from a mental and social distance (Hasselbladh, 1994). Second, since different people from different departments were involved in discussing and operationalizing the overall strategy and thereby indirect in the formulation of the different documents, the texts were infused with authority, representing no longer any specific author but the company itself (Kuhn, 2008; Spee & Jarzabkowski, 2011). This involvement of different actors in the process had two recognized effects. On the one hand, it opened up for the contribution and refinement of the strategy:

It was very well planned. And another lesson you learn when you do this as rigorously as we have is that it will hit you back when it does not hold, there are so many checkpoints and not only one or two people involved making decisions. The system is distributed

among many, the capital investors would tell if it does not work and this also creates development in the process (marketing director, head of strategic development).

On the other hand, the involvement of the employees was however not seen without purpose or without limits. Rather, cooptation can be seen as a means to marshal consent (Kuhn, 2008) and commitment to what has been agreed upon:

We wanted to obstruct the possibility to say that this does not work, I do not want this, I do not need this. You can take any form of management control system; the organization will always try to get around it. Who wants to sit in a structure someone else has decided? We managed to create a system that was strong enough to be discussed, but not questioned (marketing director, head of strategic development)

The authority of the texts was strengthened by the involvement and acceptance of actors from different departments and positions. It is worth noting that top management, such as the CEO or executive board of directors, were never mentioned to have had any influence in the development of the strategic direction, nor the formulation of the accompanying documents. Instead, top management were only mentioned as giving the “go ahead” to what was suggested from lower levels of the organizational hierarchy (that is why the CEO or members of the board is not represented among the interviewees). To conclude this section, we argue that the multitude of documents, taken together, formed an authoritative body of texts, decontextualized from single actors and authors. As such, they had significant effects on not only day-to-day operations (such as investment decisions), but also, as we will discuss in the next section, on the forth going

strategizing activities. In many ways, these disciplining effects was wanted, or at least retrospectively appreciated. The social responsible investment strategy is in this stage from an epistemic object, ambiguous and open for a multitude of interpretations and solutions, to a technical object with enough stability (Rheinberger, 1997) to be both communicated and followed in the day-to-day activities. The different texts, intertextually linked together into a coherent body of stabilized meaning, can be seen as both the tools to achieve and as the product of this transformation process. From the perspective of the strategist(s), this transformation is most often wanted since it is the technical object that can be put into instrumental use (Ewenstein & Whyte, 2009) within the daily activities. But some of the effects that we will argue for might not be so unproblematic.

Strategy documents and their effect on strategizing

During several of the interviews, documents were explicitly or implicitly referred to as points of reference in the strategy work. The main architect behind the ethical strategic approach commented the strategy work with the following statement:

Do I make a lot of internal speeches? No, I don't, because then you start building icons. Instead we use the existing functions. We have had a long meeting with the capital investment department today for example. They have ideas and we ask ourselves if they follow the policy documents. If they do, they can start building the ideas into their work (marketing director, head of strategic development).

Another interviewee, an ethics analyst, stated regarding the further development of the strategy towards including human rights issues in the investment decisions the following:

You discuss formulations, possibilities and problems. Everybody knows what we shall have, so we discuss towards a mutual understanding of how it should look like. We get an ok for the (human rights) criterion and how we will work from the top management and we work out the details here together with for example asset managers and the ethical council. It is the ethical platform, our values, that is the foundation (ethical analyst, emphasis by the authors).

Similarly as the discussion made by Spee & Jarzabkowski (2011), the documents also here legitimized particular courses of action. The interviewees repeatedly referred to the importance of the 'ethical platform', signifying stabilized meaning around the general mission and value base of the company, in many cases made explicit in different documents. Meaning was made retrospectively (Weick, 1995) towards what the company had accomplished so far, directed by and interpreted through the lenses provided by the policy documents. Infused with authority and legitimized internally as well as externally, the documents developed a form of agency of their own, influencing further strategizing activities. Many of the produced documents, especially where the ethical investment criteria was being presented, materialized a social responsible investment strategy that was highly binary, meaning that the investment object either falls into the acceptable category or it does not. When KPA after a few years started developing so called positive investment criteria, where investment objects are actively chosen because they are judged better than others in the industry, rather than being a priori part of an acceptable industry,

the inbound ambiguity and vagueness of this approach was not in conformity with the meaning established in the documents. The importance of taking this next step as well as the challenges involved was acknowledged in the following quote:

You must abandon this whole value system of black and white and right and wrong, you must take the next step and that is enormously important when you are working with positive criteria, since the methods and processes of selection is different. It is a much longer process and there will not be rules to tell you what is right and wrong, instead we have to test and see what holds together. We will most certainly do mistakes and have to back away but then we have to admit that and say that we are continuously refining our methods (managing director, KPA).

This next step, however, did not correspond with the understanding that clear-cut boundaries are paramount to gain external (and perhaps internal) credibility for the strategy. This understanding was, as we have seen, built around a binary rhetoric which was supposed to be easily understandable, something that was seen as highly important:

It was always a must that every criterion could really be put into use. Otherwise you end up in unpleasant situations with critical scrutiny. Competitors has received criticism for fuzziness in their criteria. As a consumer you should not need to control that the criteria are really working (director, responsible for marketing and branding).

The documents produced as part of the strategy work promoted the transformation of the new social responsible investment approach as an epistemic object to a technical object consisting of descriptions, guidelines and routines. Documentation played an indispensable role in this transformation process. But the content of these documents and the language used, through the specific ‘discourse of direction’ (Barry & Elmes, 1997:432) spelled out shaped this object in a special way. A certain version of social responsible investing was materialized, a simplified and highly binary version that was seen as plausible and practically possible to realize. Some awareness of the ambiguousness of this process, as well perhaps of its delimiting effects for the future could be seen in this quote:

We agree that these things are important (the ethical and sustainable behaviour of companies, authors comment) therefore we look at them, we measure them and create governance systems and indicators that we think that we recognize and work somewhere. But you count immaterial phenomena without indicating systems. When you value these you think that you understand them. But the only thing we have done is to label it and put it into a model we recognize from before. To keep it in order we do not say that this is an arrangement but how it really is (marketing director, head of strategic development)

With this version established, and the with the bundle of documents supporting and in many aspects constituting it (Ashcraft et al. 2009; Cooren, 2004), changing and developing the SRI approach further became more difficult. The new direction carried a certain amount of ambiguity and a pragmatic stance that was hard to comprehend and communicate in credible way following the rigidity and binary centred rhetoric that characterized how the strategy had been presented in

the various texts. The documents, being decontextualized (Spee & Jarzabkowski, 2011) and infused with authority developed agency on their own and at least to a some degree limited the agency of the strategists, many being the original authors of the documents. Their understanding of the strategy was influenced by what the documents stipulated and they had to relate the new ideas to what the previously produced and communicated documents said. Since the documents carried a certain stabilized meaning of how KPA should work with social responsible investing this stabilized meaning guided and delimited further action.

DISCUSSION AND CONCLUDING REMARKS

The objectifications of ideas in the form of 'text' in various documents, such as descriptions, guidelines, templates and plans could be seen as both the tools to accomplish and the product of the process of transforming the epistemic object of the yet unfamiliar strategic approach to the technical object of the established strategy. Producing documents are therefore, as previous research has shown, a common activity within strategy work. The documents provide guidelines for collective action and give agency to actors involved in the strategizing (Spee & Jarzabkowski, 2011). But at the same time they restrict and delimit future strategizing, more and more over time when more document objects are produced to stabilize organizational meaning and behaviour (Cooren & Fairhurst, 2009; Knorr-Cetina, 1997; Orlikowski, 2007; Rennstam, 2012). As with other material objects and technologies that restrict agency, a tendency of recursiveness can be observed, influencing future decisions and chain of events.

Our conclusion is therefore that the production of texts in strategy work, *every text that describes, explains or motivates the decisions, efforts and initiatives making up the long-term direction of a company*, could be understood as important objectifications of ideas about strategy with several significant consequences. The produced documents stabilize organizational meaning and legitimizes particular courses of action (Spee & Jarzabkowski, 2011). As such they give agency to actors acting according to the course of action stipulated by the documents. Given that one of the key purposes of strategy work is to guide individual and collective acting in a certain direction, these effects are neither particularly surprising, nor controversial. But at the same time, the effects on future strategizing are delimiting, making it harder to deviate from what the documents convey. The documents thereby not only delimit future agency of the actors but also develop a form of agency of their own. Even though the relationship between authorship and agency has been problematized within cultural theory (Barthes, 1968/1977; Baudrillard, 1970/1998) this relationship between documents and other objects and their authors/strategists has only recently been put into scrutiny within strategy studies (eg. Spee & Jarzabkowski, 2011). The dynamic being described in this paper adds to our understanding of ‘the problem of recursiveness’ (Jarzabkowski, 2004:530), especially when it comes to the role of textual objects. Textual objects, like documents, contributes to recursiveness by stabilizing meaning and legitimizing particular courses of action. When decontextualized, they develop agency of their own, which restricts future action, also by their original authors. This dynamic is also self-enhancing, since future action are also often documented, adding to the interrelated and intertextual bundle of documents. Taken together, this bundle of document has a significant influencing capacity on strategy work.

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