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**New Perspectives and Research**

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## Why David Sometimes Wins: Strategic Capacity in Social Movements

Marshall Ganz  
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*And there went out a champion out of the camp of the Philistines, named Goliath . . . whose height was six cubits and a span. And he had a helmet of brass upon his head, and he was armed with a coat of mail . . . and he had greaves of brass upon his legs . . . and the staff of his spear was like a weaver's beam; and his spear's head weights six hundred shekels of iron. . . . And he stood and cried to the armies of Israel. . . . "Choose you a man for you. . . . If he be able to fight with me, and to kill me, then will we be your servants; but if I prevail against him, and kill him, then shall ye be our servants. . . . Give me a man that we may fight together." When Saul and all Israel heard those words of the Philistine, they were dismayed and greatly afraid.*

*And David said unto Saul, Let no man's heart fail because of him; thy servant will go and fight with this Philistine. And Saul said to David, Thou art not able to go against this Philistine to fight with him: for thou art but a youth, and he a man of war from his youth. . . . David said . . . The Lord that delivered me out of the lion, and out of the paw of the bear, he will deliver me out of the hand of this Philistine. And Saul said unto David, Go, and the Lord be with thee.*

*And Saul armed David with his armour, and he put an helmet of brass upon his head; also he armed him with a coat of mail. And David girded his sword upon his armour, and he assayed to go; for he had not proved it. And David said unto Saul, I cannot go with these; for I have not proved them. And David put them off him. And he took his staff in his hand, and chose him five smooth stones out of the brook, and put them in a shepherd's bag which he had . . . ; and his sling was in his hand: and he drew near unto the Philistine. . . . And the Philistine looked about, and saw David, he disdained him: for he was but a youth, and ruddy, and of a fair countenance. . . . And then said David to the Philistine, Thou comest to me with a sword, and with a spear, and with a shield; but I come to thee in the name of the Lord of hosts . . . and David put his hand in his bag, and took thence a stone, and slang it, and smote the Philistine in his forehead . . . and he fell upon his face to the earth.*

—*The Holy Bible*, 1 Sam 17:4–49 (King James Version)

## INTRODUCTION: HOW DAVID BEAT GOLIATH

The belief that strategic resourcefulness can overcome institutionalized resources is an ancient one. Tales of young, guileful, courageous underdogs who overwhelm old, powerful, and confident opponents occupy a mythic place in Western culture. When Goliath, a veteran warrior, victor of many battles, arrayed in full battle gear, challenges the Israelites, their military leaders cower in fear. It is David, the young shepherd boy, to whom God gives the courage to face the giant. David's success begins with his courage, his commitment, and his motivation.

But it takes more than courage to bring David success. David thinks about the battle differently. Reminded by five stones he finds in a brook, he reflects on previous encounters in which he protected his flock from bears and lions. Based on these recollections he reframes this new battle in a way that gives him an advantage. Pointedly rejecting the king's offer of shield, sword, and armor as weapons he cannot use effectively against a master of these weapons, David conceives a plan of battle based on his five smooth stones, his skill with a sling, and the giant's underestimation of him.

The story of David and Goliath dramatizes questions about which many remain intensely curious: How have insurgents successfully challenged

those with power over them? How can we challenge those with power over us? How can we change powerful institutions that shape our very lives?

Over the course of the last 50 years there have been many such challenges in the United States and around the world: the civil rights movement, the women's movement, the environmental movement, the democracy movements of Eastern Europe, the South African liberation movement, and so forth. Social scientists tend to account for these events, however, by arguing one version or another of "the time for change was right" while many historians attribute success to the intervention of gifted, charismatic individuals. Few analysts explore relationships among the times, the people who act upon them, and the organizational settings in which they act, to learn why "Davids" succeed when they do.

Failure to focus on the contribution of strategic leadership to social movement outcomes is a particularly serious shortcoming of social movement theory (Jasper, 1997; Morris & Staggenborg, 2002). Explanations of the emergence, development, and outcomes of social movements based on variation in access to resources and opportunities stress the influence of environmental changes on actors (McAdam, McCarthy, & Zald, 1996). In this view, social movements unfold when actors predictably respond to new political opportunities or newly available resources. But theorists who emphasize opportunity explain little of why one actor should make better use of the same opportunity than another. Yet it is often in the differences in how actors use their opportunities that social movement legacies are shaped (Sewell, 1992). Other scholars, who rely on variation in resources to explain why some movements are more successful than others, fail to explain how actors with fewer resources can defeat those with more resources (McCarthy & Zald, 1977). But when insurgents overcome well-established rivals or opponents this is most often the case. Students of strategy and tactics offer accounts of their sources, their logic and their effect on outcomes, but do not explain why one organization would be likely to devise more effective tactics than another (Freeman, 1979; Gamson, 1975; Lipsky, 1968; McAdam, 1983; Tilly, 1981). And much of the discussion of the meaning that social movement actors give to what they do, which has been dealt with under the general rubric of "framing," focuses on one aspect of strategy—how social movements interpret themselves—but tells us little of how framing is actually done, who does it, or why one organization would do a better job of it than another (Benford, 1997; Benford & Snow, 2000; Davis, 2002; Snow, Rochford, Burke, Worden, & Benford, 1986). And finally, scholars who invoke "culture" to correct for

the weaknesses in structural accounts of social movements often remain quite structuralist in their analyses, only shifting the focus from political or economic structures to cultural ones (Johnston & Klandermans, 1995); but they fail to explain variation in the agency actors exercise with respect to cultural, political or economic structures. Yet it is the exercise of agency that is at the heart of strategy.

Students of strategic leadership, on the other hand, even in management, military, and political studies, focus more on what leaders do and how strategy works than on explaining why leaders of some organizations devise more effective strategy than others. Popular accounts of insurgent success attribute effective strategy to uniquely gifted leaders rather than offering systematic accounts of conditions under which leaders are more or less likely to devise effective strategies (Howell, 1990; Westley & Mintzberg, 1988). In part, this is because good strategy is often anything but obvious. Based on the innovative, often guileful, exercise of agency, strategy can be hard to deduce from objective configurations of resources and opportunities because it may be based on a novel assessment of them. Although effects attributed to charismatic leaders— attracting followers, enhancing their sense of self-esteem, and inspiring them to exert extra effort— can be invaluable organizational resources, they are distinct from good strategy (Hollander & Offermann, 1990; House, Spangler, & Woycke, 1991). In social movement settings, especially at times of crisis, talented leaders may also be transformed into symbols of a new community of identity, a source of their charisma (Collins, 1981; Durkheim, 1964; Pillai, 1996; Weber, 1978a).<sup>1</sup> But as sociologists of religion and others have documented, many groups have charismatic leaders but few devise strategy effective enough to achieve institutional stability, much less to become successful social movement organizations (Carlton-Ford, 1992; Stark & Bainbridge, 1985).<sup>2</sup>

<sup>1</sup> Although charisma is often viewed as a personality attribute, it is better understood as an interaction between leader and constituency. Weber (1978b) attributes the “charismatic” authority of religious leaders to their followers’ experience of the “divine” sources of their authority. Durkheim (1964) describes the role of mythic leaders or “civilizing heroes” as communal symbols. Collins (1981) argues that charismatic leaders are “individuals who have become the focal point of an emotion-producing ritual that links together a large coalition; their charisma waxes and wanes according to the degree to which the aggregate conditions for the dramatic predominance of that coalition are met.” And Pillai (1996) offers empirical data that links the emergence of charismatic leaders to a group’s experience of crisis.

<sup>2</sup> Stark and Bainbridge (1985), for example, report that in 1978 California was home to 167 of the nation’s some 450 cults, most of which had charismatic leaders, and Carlton-Ford (1992) reports 22 of 44 urban communes studied had charismatic leaders.

Explaining social movement outcomes, then, often requires accounting for the fact that different actors act in different ways, some of which influence the environment more than others. Some see political opportunities where others do not, mobilize resources in ways others do not, and frame their causes in ways others do not.

But strategy is not purely subjective. Strategic thinking is reflexive and imaginative, based on ways leaders learn to reflect on the past, attend to the present, and anticipate the future (Bruner, 1990). Leaders—like all of us—are influenced by their life experiences, relationships, and practical learning that provide them with lenses through which they see the world (Banaszak, 1996; Bandura, 1989; DiMaggio, 1997; DiMaggio & Powell, 1991; Zerubavel, 1997),<sup>3</sup> and by the organizational structures within which they interact with each other and with their environments (Rogers, 1995a; Van de Ven, Polley, Garud, & Venkataraman, 1999; Weick, 1979). In this chapter, I discuss how the strategic capacity of a leadership team— conditions that facilitate the development of effective strategy— can help explain why “David” sometimes wins (Ganz, 2000a, 2000b).

## UNDERSTANDING STRATEGY

In our interdependent world of competition and cooperation, achieving one’s goals often requires mobilizing and deploying one’s resources to influence the interests of others who control resources we need—the use of power (Dahrendorf, 1958; Emerson, 1962; Lukes, 1975; Michels, 1962; Oberschall, 1973; Salancik & Pfeffer, 1977; Tilly, 1978; Weber, 1946).<sup>4</sup> By resources I mean political, economic and cultural—or moral—assets actors can use to realize their goals (Bourdieu, 1986; Emerson, 1962;

<sup>3</sup> A number of scholars offer psychological or sociological versions of what Bandura (1989) calls “the emergent interactive agency” that he contrasts with “pure autonomous agency” or “mechanistic agency,” including DiMaggio and Powell (1991), Banaszak (1996), Zerubavel (1997), and DiMaggio (1997).

<sup>4</sup> This concept of power derives from Weber’s (1946) view of stratification as power relations emergent from competition and collaboration among actors within economic, status and political markets, a view more recently articulated by Dahrendorf (1958). Oberschall (1973) and Tilly (1978) introduced this view of power to the study of social movements. Lukes (1975) shows how the power relations with which social movements contend become institutionalized. And at the micro level, Emerson (1962) develops a similar concept of power as growing out of exchange relations among individuals in terms of their interests and resources. To conceptualize power relations within organizations I draw on a tradition originating with Michels (1962), more recently articulated by Salancik and Pfeffer (1977).

Hall, 1997; Mann, 1986; Oberschall, 1973; Tilly, 1978; Weber, 1946).<sup>5</sup> Although no one is entirely without resources, people do not have power if they are unable to mobilize or deploy their resources in ways that influence the interests of others. Bus fare, for example, can become a source of power if mobilized collectively in a bus boycott. Strategy is how actors translate their resources into power—to get “more bang for the buck.”

Opportunities occur at moments when actors' resources acquire more value because of changes in the environmental context. Actors do not suddenly acquire more resources or devise a new strategy, but find that resources they already have give them more leverage in achieving their goals. A full granary, for example, acquires greater value in a famine, creating opportunity for its owner. Similarly, a close election creates opportunity for political leaders who can influence swing voters. A labor shortage creates opportunity for workers to get more compensation for their labor. This is one reason timing is such an important element of strategy.

Actors have unequal access to resources, in part because of the ways in which the outcomes of prior competition and collaboration become institutionalized, influencing the distribution of resources and reshaping rules by which actors compete and arenas within which they can do so (Gamson, 1975; Lukes, 1975; North, 1990; Skocpol, 1985). A critical strategic goal of those contesting power is to find ways to turn short-term opportunities into long-term gains by institutionalizing them, for example, as formal organizations, collective bargaining agreements, or legislation. Assessing strategic effectiveness thus requires taking a “long view,” a reason for studying the development of strategy over time (Andrews, 1997).

Strategy is how we turn what we have into what we need to get what we want. It is how we transform our resources into the power to achieve our purposes. It is the conceptual link we make between the targeting, timing, and tactics with which we mobilize and deploy resources and the outcomes we hope to achieve (Brown & Eisenhardt, 1998; Clausewitz, 1968; Hamel & Prahalad, 1989; Porter, 1996). Although we often do not act rationally and our actions can yield unintended outcomes, we do act purposefully (Bruner, 1990; Cohen, March, & Olson 1972; Crow, 1989; Salancik & Pfeffer, 1977; Watson, 1990; Weick, 1979). Strategy is effective when we realize our goals through its use. Studying strategy is a way to discern the patterns in the relationship among intention, action and outcome.

<sup>5</sup>Although resources are often construed in narrow economic terms, Weber's multidimensional view is echoed in Mann's (1986) account of ideological, economic, military, and political sources of power, Bourdieu's analysis of “cultural capital,” and Hall's (1997) “moral authority as a power resource.”

Our strategy frames our choices about targeting, timing, and tactics. As schema theorists have shown, we attribute meaning to specific events by locating them within broader frameworks of understanding (D'Andrade, 1992; DiMaggio, 1997; Fiske & Taylor, 1991; Gamson, 1992; Gamson & Meyer, 1996; Goffman, 1974; Snow et al., 1986). The strategic significance of the choices we make about how to target resources, time initiatives, and employ tactics depends on how we frame them relative to other choices in a path toward our goals. One reason it is difficult to study strategy is that although choices about targeting, timing, and tactics can be directly observed, the strategy that frames these choices—and provides them with their coherence—must often be inferred, using data drawn from interviews with participants, oral histories, correspondence, memoirs, charters, constitutions, organizational journals, activity reports, minutes of meetings, and participant observation.

Because strategy orients current action toward future goals, it develops in interaction with an ever-changing environment, especially the actions and reactions of other actors (Alinsky, 1971; Brown & Eisenhardt, 1997; Burgelman, 1991; Hamel, 1996; Mintzberg, 1987; Weick, 1979).<sup>6</sup> In fixed contexts in which rules, resources, and interests are given, strategy can, to some extent, be understood in the analytic terms of game theory (Schelling, 1960). But in settings in which rules, resources, and interests are emergent—such as social movements—strategy has more in common with creative thinking (Brown & Eisenhardt, 1997; Hamel, 1996; Morris, 1984). Strategic action can thus best be understood as an ongoing creative process of understanding and adapting new conditions to one's goals (Brown & Eisenhardt, 1998).

The relationship of strategy to outcomes can be clarified by the distinction that game theorists make among games of chance, skill, and strategy (Schelling, 1960). In games of chance, winning depends on the luck of the draw. In games of skill, it depends on behavioral facility, like hitting a tennis ball. In games of strategy, it depends on cognitive discernment—in interaction with other players—of the best course of action, as in the game of Go. In most games, all three elements come into play. Poker, for example, involves chance (deal of the cards), skill (estimating probabilities), and strategy (betting decisions). Although chance may be

<sup>6</sup>Community organizer Saul Alinsky (1971) summarized this view of emergent strategy as “the action is in the reaction.” Weick (1979) articulates a scholarly version of this perspective—one that since the business environment has become more turbulent has supplanted “strategic planning” in the work of Mintzberg (1987, 1994), Burgelman (1991), Hamel (1996), and Brown and Eisenhardt (1997).

dispositive in any one hand, or even one game, in the long run skill and strategy distinguish excellent players—and their winnings—from others. Similarly, environmental developments can be seen as “chance” in so far as any one actor is concerned. But, in the long run, some actors are more likely to achieve their goals than others because they are better able to take advantage of these chances. Environmental change may generate the opportunities for social movements to emerge, but the outcomes and legacies of such movements have more to do with the strategies actors devise to turn these opportunities to their purposes, thus reshaping their environment.

### A THEORY OF STRATEGIC CAPACITY

Strategy is articulated in decisions organizational leaders make as they interact with their environment. The likelihood that their strategy will be effective increases with their motivation, access to salient knowledge, and the quality of the heuristic processes they employ in their deliberations—their strategic capacity.

In explaining sources of effective strategy, I focus on why one organization is more likely to develop a series of effective tactics than another, not why one tactic is more effective than another. Unlike studies of the effectiveness of particular tactics by social movement, military, political or management scholars, identification of factors that influence effective strategizing requires studying the same organizations over time. (Gamson, 1975; Lipsky, 1968; McAdam, 1983). Although strategic capacity, strategy, and outcomes are distinct links in a probabilistic causal chain, greater strategic capacity is likely to yield better strategy, and better strategy is likely to yield better outcomes.

Variation in strategic capacity may also explain differences in what actors make of unique moments of opportunity that demand rapid decisions—especially moments of extraordinary flux when sudden reconfigurations of leadership and organization may facilitate the emergence of social movements. And because the strategic capacity of organizations can grow or atrophy, such variation may help explain changes in organizational effectiveness over time—why some new organizations overcome the “liability of newness” to succeed while other old organizations suffer from a “liability of senescence” and fail.

I do not claim to have found a key variable sufficient to account for all differences in observed outcomes. Rather, I argue that the outcome I try

to explain—one group devises more effective strategy than another—is more or less likely to the extent that conditions specified in this model are met. In poker, chance may determine the outcome of any one hand, or even a game, but in the long run, some players are more likely to be winners than others. An organization can stumble on opportunity, but I argue that the likelihood that the organization will make strategic use of it depends on factors I specify here.

In viewing strategy as a kind of creative thinking, as shown in Fig. 10.1, I build on the work of social psychologists who hypothesize three key influences on creative output: task motivation, domain-relevant skills, and heuristic processes (Amabile, 1996).<sup>7</sup> In this view, creativity is enhanced by motivation generated by rewards that are intrinsic to task performance, rather than extrinsic to it. Although domain-relevant skills facilitate the implementation of known algorithms to solve familiar problems, heuristic processes are required to generate new algorithms to solve novel problems (Amabile, 1996a; J. R. Hackman & Morris, 1975).

Whereas creativity is an individual phenomenon, strategy is more often than not the creative output of a leadership team. The conditions under which a leadership team interacts contribute social influences that may be more or less supportive of the creativity of its individual members (Amabile, 1988, J. R. Hackman & Morris, 1975; McGrath, 1984; 1996; Nemeth & Straw, 1989; Van de Ven et al., 1999). Furthermore, the task of devising strategy in complex, changing environments may require interaction among team members like the performance of a jazz ensemble. As a kind of distributed cognition, it may require synthesizing skills and information beyond the ken of any one individual, making the terms of that interaction particularly important (Hutchins, 1991; Rogers, 1995; Van de Ven et al., 1999).

#### Motivation

David committed to fight Goliath before he knew how he would do it. He knew *why* he *had* to do it before he knew *how* he *could* do it. Motivation influences creative output because it affects the focus one brings to one's work, the ability to concentrate for extended periods of time, persistence, willingness to take risks, and ability to sustain high energy

<sup>7</sup>I am particularly indebted to Amabile's (1996) fine work on creativity that provides links between micro-behaviors and macro-outcomes. In adapting her work to an understanding of strategy, I substitute the term *salient knowledge* for *domain-relevant skills* to better capture the importance of environmental information to strategic thinking and I consider a broader range of motivational sources.

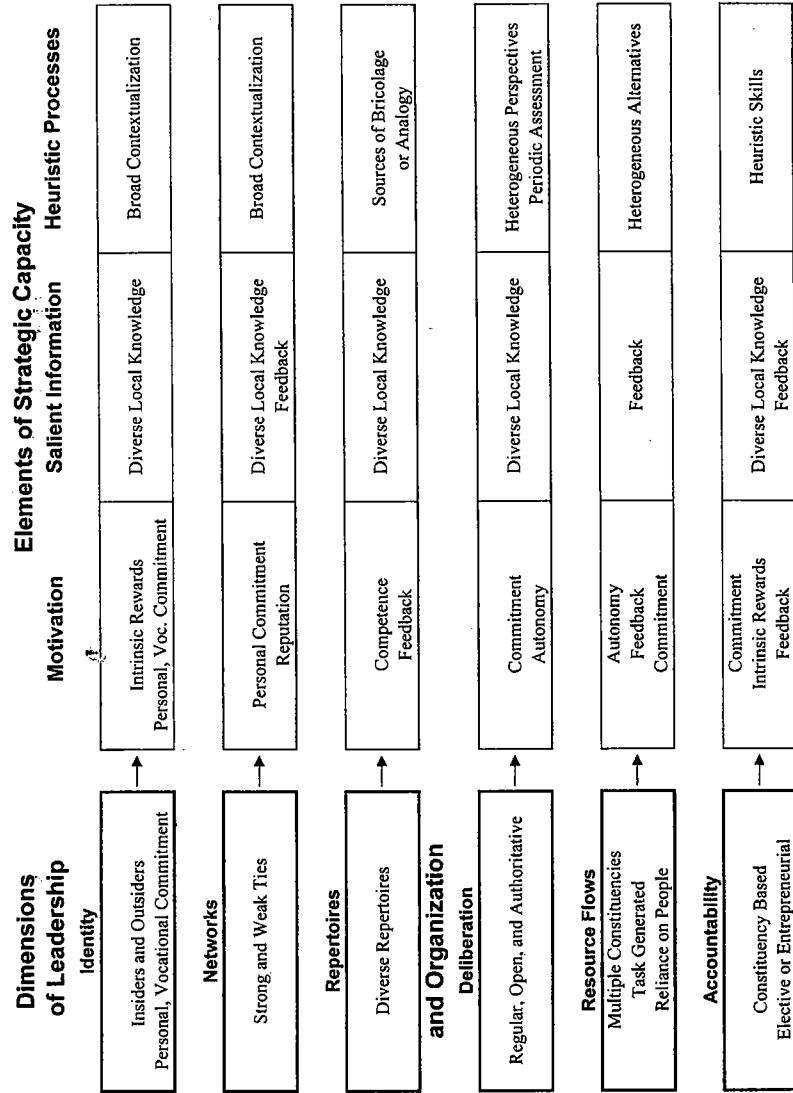


FIG. 10.1. This chart illustrates leadership and organizational sources (left column) of strategic capacity (right three columns). The influence is meant to be simultaneous, not sequential.

(Bergman, 1979; Glover & Sautter, 1977; Prentky, 1980; Ruscio, Whitney, & Amabile, 1995; Walberg, 1971). Motivated individuals are more likely to do the work required to acquire needed knowledge and skills (Conti, Amabile, & Pokkok, 1995). They are also able to override programmed modes of thought in order to think more critically and reflectively if they are intensely interested in a problem, dissatisfied with the status quo, or experiencing a schema failure as a result of sharp breaches in expectations and outcomes (Abelson, 1981; Bourdieu, 1990; DiMaggio, 1997; Garfinkel, 1984; Moscovici, 1984; Swidler, 1986). To the extent that success enhances motivation, it not only generates more resources but may encourage greater creativity (Chong, 1991).

Psychologists locate the sources of creative motivation primarily in the intrinsic rewards derived from work one loves to do (Amabile, 1996). While some emphasize the rewards derived from stimulation of novelty, feelings of mastery, and feelings of control experienced in the competent performance of a task (Berlyne, 1960; Deci & Ryan, 1985; Harter, 1978; Hebb, 1953; White, 1959), others emphasize the “meaningfulness” attributed to the task by the person doing it (J. R. Hackman & Oldham, 1976). I argue that for social movement leaders, motivation deriving from identity-forming values or the “moral sources” (Taylor, 1989) that infuse one’s life with meaning and one’s work with meaningfulness are of particular importance (Bruner, 1990; D’Andrade, 1992; Peterson, 1999; R. Turner & Killian, 1987; Weber, 1946).<sup>8</sup> Work that is expressive of identity can be viewed as a “vocation,” and work at one’s vocation promises more motivational reward than work at a “job” (Weber, 1958).

In the group work setting of a leadership team that is devising strategy, individual motivation is enhanced when people enjoy autonomy, receive positive feedback from peers and superiors, and are part of a team competing with other teams. It is dampened when they enjoy little autonomy, get no feedback or only negative feedback from peers and superiors, or face intense competition within the team (Amabile, 1988; R. Hackman, 1990).

### Salient Knowledge

David did not know how to use King Saul’s weapons, but he did know how to use stones as weapons. A second element of creativity is possession of

<sup>8</sup>I acknowledge that “interests” influence behavior, but follow Weber’s (1946) “switchman” metaphor according to which values shape people’s understanding of their interests—a view shared by R. Turner and Killian (1987), Bruner (1990), D’Andrade (1992), and Peterson (1999).



domain-relevant skills, mastery of which is requisite to developing novel applications. Creative jazz piano players have learned how to play the piano very well. Picasso mastered the styles of his predecessors before painting *Les Femmes d'Alger*.

In terms of strategy, mastery of specific skills—or how to strategize—is relevant, but so is access to local knowledge of the constituencies, opponents, and third parties with which one is interacting. We expect effective military strategists to have command not only of the art of strategy but also to possess an understanding of the troops, enemy, battlefield, and so forth. Salient knowledge includes both skills and information about the settings in which those skills are applied. The better our information about how to work within a particular domain—our local knowledge—the more likely we are to know how to deal with problems arising within that domain. When problems are routine, mastery of known algorithms, or, in the language of social movement theory, repertoires of collective action, facilitate effective problem solving. But since environments can change in response to our initiatives, especially volatile social movement environments, regular feedback is important in evaluating responses to these initiatives (Zaltman, Duncan, & Holbeck, 1973). When problems are novel, we must sort through our “repertoire” to find that which can be useful to us in learning how to innovate a response.

### Heuristic Processes

David found his skill with stones useful because he could imaginatively recontextualize the battlefield, transforming it into a place where, as a shepherd, he knew how to protect his flock from wolves and bears. An outsider to the battle, he saw resources others did not see and opportunities they did not grasp. Goliath, on the other hand, the insider, failed to see this shepherd boy as a threat.

When we face new problems, we innovate solutions by using heuristic methods to imaginatively recontextualize data or synthesize it in new ways (Amabile, 1996; Bernstein, 1975; Langer, 1978; Langer & Imber, 1979; March & Olsen, 1976). To think creatively, we must recognize our problems as new ones, at least to us, that require new solutions. To find new solutions we use our gift for analogy to reframe data in ways that make novel interpretations and new pathways conceivable, combining familiar elements in new ways as bricoleurs (J. Campbell, 1997; Douglas, 1986; Gentner, 1989; Lakoff & Johnson, 1980; Langer, 1989; Levi-Strauss, 1966; Strang & Meyer, 1994). Because it requires fresh perspectives and novel

approaches, innovative thinking is facilitated by encounters with diverse points of view—within one’s own life experience or combined experience of the members of a group (Bernstein, 1975; DiMaggio, 1997; Kasperon, 1978; Langer, 1989; Nemeth, 1986; Piore, 1995; Rogers, 1995; Rosaldo, 1989; Senge, 1990; Weick, 1979; Van de Ven et al., 1999). Access to a diversity of approaches not only offers multiple routines from which to choose, but also contributes to the “mindfulness” that multiple solutions are possible (Langer, 1989) and that most known solutions are “equivocal” (Weick, 1979). And at the most basic level, the more ideas that are generated, the greater the likelihood that there will be good ones among them (D. Campbell, 1960; Simonton, 1988).

Creative problem solving by teams is challenging because minorities tend to conform to majorities and persons with less authority tend to conform their views to those of persons with more authority (Asch, 1952; J. R. Hackman & Morris, 1975; Janis, 1972; McGrath, 1984; Milgram, 1974). Expression of minority views, however, can encourage better problem solving because it stimulates divergent thought about issues, causing decision makers to attend to more aspects of the situation and reexamine their premises (Nemeth, 1986). And solving certain problems, such as strategizing in a complex and changing environment, may require access to a range of knowledge, skill, and experience broader than that which is available to any one person.

Teams thus composed of persons with heterogeneous perspectives are more likely to make good decisions than homogeneous teams, especially in solving novel problems, because they can access greater resources, bring a broader range of skills to bear on decision making, and marshal a diversity of views (Nemeth & Staw, 1989). Heterogeneity may grow out of the life experience of team members, their affiliation with diverse relational networks, or their knowledge of distinct action repertoires.

To take advantage of heterogeneity, however, a team must learn both to foster minority expression that encourages divergent thinking associated with creativity—learning by discovery—and to switch to convergent thinking required to make decisions—learning by testing. Managing these tensions is especially challenging when planning and action occur simultaneously, as in the process of innovation (Van de Ven et al., 1999). They are managed more successfully by leaders who are tolerant of ambiguity, who employ distinct organizational mechanisms for creative deliberation and decision making, rely on multiple sources of resources and authority, and resolve conflict by negotiation rather than by fiat or by consensus (Bartunek, 1993; Levinthal, 1997; Nemeth & Staw, 1989; Osborn, 1963).

## SOURCES OF STRATEGIC CAPACITY: LEADERSHIP AND ORGANIZATION

Having proposed a mechanism by which strategy is generated, I turn to the “input” to that mechanism, the sources of its strategic capacity—leadership and organization. As a unit of analysis, I focus on leadership teams—those persons who formally or informally participate in making authoritative strategic choices for an organization or units of an organization (Oberschall, 1973; Porter, 1996). I do not try to evaluate their qualities of leadership as such, but rather their contribution to the formulation of strategy. Although the “person in charge” plays a uniquely important leadership role, especially in forming, coaching and sustaining a team (Bartunek, 1993; J. R. Hackman & Walton, 1986), strategy, like innovation, is more often a result of the interaction among leaders than organizational myths usually acknowledge (Van de Ven et al., 1999). Understanding strategic capacity may also help to explain why some groups are better able to take advantage of moments of opportunity than others and to specify the conditions under which the effectiveness of an organizational strategy will grow or atrophy.

As shown in Fig. 10.1, the strategic capacity of a leadership team is enhanced when it includes people who are insiders to some constituencies, but outsiders to others; who have strong ties to some constituencies, but weak ties to others; and who have learned diverse collective action repertoires. Leadership teams make the most of these attributes if they conduct regular, open, and authoritative deliberations and are held accountable by multiple, salient constituencies from whom they also draw their resources.

### Leadership

Leaders devise strategy in interaction with their environments. Scholars who recognize biographical experience as the primary source of cognitive socialization (Bernstein, 1975; DiMaggio, 1997; Zerubavel, 1997), cultural perspective (Jasper, 1997; Rosaldo, 1989), and motivation (D’Andrade, 1992) link leaders’ psychological, professional, organizational, and generational backgrounds to specific strategies. Few, however, have explored links between leaders’ backgrounds and their potential to develop *effective* strategy (Chandler, 1962, 1977; Freeman, 1979; Kuhn, 1962; Oberschall, 1973; Ross, 1983; Wickham-Crowley, 1992). But leaders’ identities, sociocultural networks, and tactical repertoires—or who they are, whom they know, and what they know—do influence their strategic capacity.

Leadership teams that include “insiders” and “outsiders” have more strategic capacity than those that do not, as shown in the first row of Fig. 10.1, “Identity.” Leaders’ “identities” derive from their backgrounds as to race, class, gender, generation, ethnicity, religious beliefs, family background, education, and professional training. Teams of “insiders” and “outsiders” can thus combine access to a diversity of salient knowledge with the facility to recontextualize this knowledge creatively (Bernstein, 1975; Hamel, 1996; Rogers, 1995; Senge, 1990; Weick, 1979). Individuals with the “borderland” life experience of straddling cultural or institutional worlds are more likely to make innovative contributions than those without such experience (Kuhn, 1962; Piore, 1995; Rickards & Freedman, 1978; Rosaldo, 1989; Weick, 1979). Insiders who identify personally with their constituencies or outsiders whose vocation entails serving those constituencies are likely to derive more intrinsic rewards from their work than those whose motivation is solely instrumental or occupational (Howell, 1990; Meyer & Allen, 1997; Weick, 1979). Teams composed of persons with heterogeneous perspectives are likely to make better decisions than homogeneous teams, especially in solving novel problems, because they can access more resources, bring a broader range of skills to bear on decision making, and benefit from a diversity of views (Nemeth & Staw, 1989; Sutcliffe, 2000).

Leadership teams that include people networked by “strong” ties to some constituencies and by “weak” ties to others will have more strategic capacity than those that do not, as shown in the second row of Fig. 10.1, “Networks.” Sociocultural networks are sources of ideas about what to do and how to do it (Emirbayer & Goodwin, 1994), mechanisms through which social movements recruit (Granovetter, 1973; McAdam & Paulsen, 1993; Stark & Bainbridge, 1985), sources of social capital (Chong, 1991; Coleman, 1990; Putnam, 1993), and incubators of new collective identities (Gamson, 1991; Taylor & Whittier, 1992). Sociologists distinguish between the “strong” ties within homogeneous networks and “weak” ties within heterogeneous networks. Leaders with strong constituency ties are more likely to know where to find local resources, whom to recruit, what tactics to use, and how to encourage constituents to identify with the organization than those without such ties (Morris, 1984). On the other hand, leaders with weak ties with multiple constituencies are more likely to know how to access a diversity of people, ideas, and routines that facilitate broad alliances. Combinations of strong ties and weak ties are associated with social movement recruitment because they link access with commitment, just as they are associated with innovation because they link

information with influence (Rogers, 1995). Diverse ties, like diverse life experiences, facilitate the creative recontextualization of strategic choices. But strong ties strengthen a leader's motivation, due to his or her personal commitment to and identification with those whose lives are influenced by the choices he or she makes and among whom he or she earns his or her reputation (Chong, 1991).

Leadership teams that include persons with knowledge of diverse collective action repertoires have more strategic capacity than those without such knowledge, as shown in the third row of Fig. 10.1, "Repertoires." Knowledge of diverse collective action repertoires affords a leadership team greater strategic flexibility than those without that knowledge (Alexander, 1998; Hamel, 1996; Moore, 1995). Collective action repertoires are useful because of their practical (people know what to do), normative (people think they are right), and institutional (they attach to resources) utility in mobilizing people familiar with them (Clemens, 1996; Tilly, 1981). Tactics drawn from repertoires known to one's constituency but not to one's opposition are particularly useful (Alinsky, 1971). And knowledge of multiple repertoires not only widens leaders' range of possible choices, but affords them the opportunity to adapt to new situations through heuristic processes of bricolage or analogy. The motivation of leaders who are adept in such repertoires is enhanced by the competence they experience in their use and by positive feedback from constituencies who find these repertoires familiar.

### Organization

Leaders interact with their environment from within organizational structures. A structure is created by commitments among founders who enact ways to interact with each other and with their environment (Weick, 1993). It defines patterns of legitimacy (DiMaggio & Powell, 1991; Weber, 1978c), power (Emerson, 1962; Perrow, 1986; Salancik & Pfeffer, 1977), and deliberation (March & Olson, 1976). Although organizational form may be a founders' strategic choice (Child, 1972; Clemens, 1996; Eisenhardt & Schoonhoven, 1990; Oliver, 1988; Weick, 1993), once established, it has a profound influence on subsequent innovation (Damanpour, 1991; Zaltman et al., 1973) and strategy (Bower, 1970; Chandler, 1962). In the development of strategy venues of deliberation, mechanisms of accountability, and resource flows are particularly important.

Leadership teams that conduct regular, open and authoritative deliberation have more strategic capacity than those that do not, as depicted in the

fourth row of Fig. 10.1, "Deliberation." Leadership teams conducting regular, open, and authoritative deliberation enhance their strategic capacity because they acquire access to salient information, participate in a creative process by means of which they explore new ways to use this information, and are motivated by commitment to choices they participated in making and upon which they have the autonomy to act (Duncan, 1973; R. Hackman, 1990; Ruscio et al., 1995). Regular deliberation facilitates initiative by encouraging the periodic assessment of activities, regardless of whether or not there is a crisis (Brown & Eisenhardt, 1997, 1998). And deliberation open to heterogeneous points of view—or "deviant" perspectives—facilitates better decisions (Nemeth & Staw, 1989), encourages innovation (McCleod, 1992), and develops group capacity to perform cognitive tasks more creatively and effectively (Hutchins, 1991). To realize these benefits, leaders must develop deliberative practices encouraging the divergent thinking that grows out of the expression of diverse views as well as the convergent thinking required to make decisions to act upon them. For this purpose, conflict resolution by negotiation, accompanied by voting, may be preferable to either fiat or consensus because it preserves difference yet makes collective action possible (Bartunek, 1993). Deliberation resulting in actionable decisions motivates actors to take part in and to implement that which was decided upon (R. Hackman, 1990; Mintzberg & McHugh, 1985).

Leadership teams that mobilize resources, especially human resources, that are generated by an organizational program serving multiple constituencies, develop more strategic capacity than those that do not, as shown in the fifth row of Fig. 10.1, "Resource Flows." Leaders who mobilize resources from constituents must devise strategy to which constituents will respond (Knocke & Wood, 1981; Mansbridge, 1986; Pfeffer & Salancik, 1978). If membership dues are a major source of support, leaders learn to do what they have to do to get members to pay their dues. Reliance on resources drawn primarily from outside one's core constituency—even when those resources are internal to the organization, such as an endowment—may dampen leaders' motivation to devise effective strategy. As long as they attend to the politics that keep the bills paid, they can keep doing the same thing "wrong." At the same time, leaders who draw resources from multiple constituencies acquire the strategic flexibility that goes with greater autonomy of greater room to maneuver (Alexander, 1998; Powell, 1988). Resources drawn from multiple sources may also encourage expression of the diverse views that are important for creative thinking (Levinthal, 1997). Leaders' choices about which constituencies

from whom to mobilize resources can thus have an important influence on subsequent strategy (Oliver & Marwell, 1992). Relying more on people than on money facilitates growth in strategic capacity to the extent that it encourages development of more leaders who know how to strategize. The more capable strategists to which an organization has access, the greater the flexibility with which the organization can pursue its objectives and the larger scale on which it can do so (Weick, 1979).

Leadership teams that are self-selected or elected by constituencies to whom they are accountable have more strategic capacity than those selected bureaucratically, as shown in the sixth row of Fig. 10.1, "Accountability." Accountability structures influence strategy by establishing routines for leadership selection and defining loci of responsiveness. Leaders who are accountable to those outside their core constituency may have been selected based on criteria that have little to do with knowledge of or motivational connection with that constituency. As innovation scholars have shown, interaction with one's constituency (or customers) is a particularly important source of salient new ideas (Utterback, 1971; Von Hippel, 1988). Leaders selected bureaucratically are more likely to possess the skills and motivations compatible with bureaucratic success than with the creative work that innovation requires. Elected leaders are at least likely to have useful knowledge of the constituency that elected them and the political skills to have been elected. Entrepreneurial or self-selected leaders—at whose initiative the undertaking takes place—are more likely to possess skills and intrinsic motivations associated with creative work (Chambers, 1973; Getzels & Csikszentmihalyi, 1976; MacKinnon, 1965). Although elective and entrepreneurial leadership selection processes may be in tension with one another, either is likely to yield more strategic capacity than bureaucratic leadership selection.

### Timing

Strategic choices are made not only in certain places but also at certain moments in time. Yet moments of opportunity come and go, and the choices that actors make at some moments have far greater influence than those made at other moments. What influence, if any, does strategic capacity have on actors' ability to act not only in appropriate ways but in timely ones?

Sociologists, organizational behavior scholars, and cultural analysts note that some moments have greater causal significance for subsequent events than other moments. Some sociologists emphasize the significance

of "critical junctures," moments when events unfolding along distinct causal pathways interact to yield unique opportunities (Skocpol, 1984). Others identify as "focusing moments" events that create unique opportunities for mobilization by drawing attention to particular issues (Lofland, 1996). Others cite the "eventful temporality" of unique events that alter the deep context in which subsequent events unfold (Sewell, 1996). Organizational scholars identify portentous moments of organizational development as midway points toward realization of particular goals and other moments of high contingency (Gersick, 1994; Weick, 1979, 1993). Cultural scholars point to moments of crisis or "role transition" in the lives of individuals or communities at which norms, identities, and values become fluid or liminal, compared with other times when they are relatively resilient (Jasper, 1997; Morris, 1993; Smelser, 1962; Swidler, 1986; V. Turner, 1966; Turner & Killian, 1987). Moments of historical, cultural and organizational fluidity may occur singly or together—what scholars call *entrainment*—alignment of internal and external rhythms of change (Ancona & Chong, 1996).

Ironically, those moments when actors' strategic choices may matter most may also be moments of radical uncertainty, particularly in the case of social movements. Breakthrough events may alter the affected individuals, organizations, and environments so deeply that their consequences depend almost entirely on what actors make of them. Victories may be moments when strategic choices matter most, not times to "rest on one's laurels," but rather to make the most of one's successes. Victories may be moments of greatest risk.

Because of their radical uncertainty, these are conditions under which strategic capacity may matter most. It may be when the value of reliance on known algorithms is most limited that creative capability is most important (Tushman & Murmann, 1997). Leadership teams with more strategic capacity can make not only more informed choices, but quicker ones, allowing them to take greater advantage of unique moments of opportunity. And leadership teams with more strategic capacity can take advantage of moments of unique opportunity to reconfigure their own leadership and structure in ways that allow them to enhance their strategic capacity further.

### Dynamics

Since strategic capacity is the result of a relationship among leaders, organization, and environment, failure to adapt to environmental change can

lead to atrophy. On the other hand, if organizations adapt their leadership to changes in their environment and continue interacting with it, their strategic capacity can grow. Because established organizations rely on their resources for institutional power, their loss of resourcefulness may only become apparent when they are required to face new challenges in unfamiliar environments. That strategic capacity can atrophy helps explain not only why David can sometimes win but also why Goliath can sometimes lose.

Scholars note that organizations institutionalize as environments change (Hannan & Freeman, 1984; Stinchcombe, 1965). Processes of organizational inertia inhibit adaptation by old organizations to new environments, thus creating niches within which new organizations can emerge—a liability of aging or senescence (Aldrich & Auster, 1986). Leaders of the newer organizations were recently selected, have more organizational flexibility, and work in closer articulation with the environment. Leaders of older organizations were often selected in the past, are constrained by institutional routines, and may have resources that allow them to operate in counterproductive insulation from the environment. As leaders persist, they form bonds among themselves, develop common understandings of “how things work” and select others like themselves to lead. Access to internal organizational resources can insulate them, in the short run, from environmental change. For a time, these resources may even give them the power to shape that environment—but only for a time. Changes in organizational structure that reduce leaders’ accountability to constituents, or the need to mobilize resources from constituents—or changes in deliberative processes that suppress dissent—can diminish strategic capacity, even as resources grow. The strategic capacity of an organization can thus grow over time if it adjusts its leadership team to reflect environmental change, multiplies deliberative venues, remains accountable to salient constituencies, and derives resources from them. Similarly, strategic capacity may atrophy if an organization fails to adjust its leadership, limits deliberative venues, loses accountability to salient constituencies, and relies on internal resources. Older organizations are likely to have less strategic capacity than newer ones.

### Strategic Process Model

As summarized in Fig. 10.2, “Strategic Process Model,” then, I argue that outcomes are influenced by strategy, the effectiveness of which is, in turn, the result of the strategic capacity of a leadership team. And the strategic

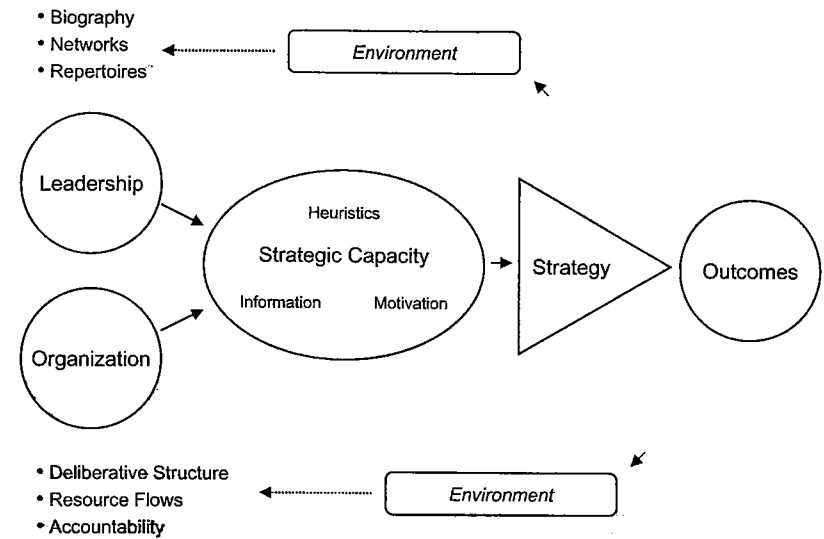


FIG. 10.2. Strategic process.

capacity of a leadership team is the result of who its members are and how they structure their interaction with each other and with their environment, as explained previously.

### EVALUATING STRATEGIC CAPACITY

Although elsewhere I show that variation in strategic capacity can explain the success of the United Farm Workers as compared with its rival organizations, the AFL-CIO’s Agricultural Workers Organizing Committee (AWOC) and the International Brotherhood of Teamsters, in this chapter I’ve focused on articulating strategic capacity as a conceptual tool to help explain other cases of David-like success, or failure. How generalizable—and therefore, useful—can we expect this concept to be?

The core argument on which strategic capacity rests is the claim that under conditions of uncertainty, the capability to generate new algorithms, when rooted in deep understanding of the environment, is more strategically valuable than the capability to apply known algorithms, no matter how expertly. In other words, under conditions in which rules, resources, and interests are highly institutionalized and links between ends and means are

certain, as in the world of game theory, the relationship between resources and success should be predictable, especially when expertise at how to play the game is factored in. Strategic capacity is thus more useful explaining outcomes in turbulent environments where rules, resources, and interests are emergent and links between ends and means are uncertain. This suggests that although it was developed in the context of social movement insurgency, strategic capacity as an analytic concept could be useful in explaining outcomes in any such environment—political, economic, or social.

One way the explanatory power of strategic capacity could be evaluated is with sets of cases in which strategic capacity and resources vary, as shown in Fig. 10.3. Strategic capacity adds the most explanatory value in cases falling into the upper left quadrant (little resources, lots of strategic capacity) and lower right quadrant (lots of resources, little strategic capacity). But it could be tested with respect to any set of cases not limited to the lower left quadrant (little resources, little strategic capacity) or the upper right quadrant (lots of resources, lots of strategic capacity). Although strategic capacity would have the least explanatory value for cases confined to the lower left quadrant (little resources, little strategic capacity) or upper right quadrant (lots of resources, lots of strategic capacity), these are quadrants in which we expect to find the most cases with the most predictable outcomes—that is, challengers with little resources and strategic capacity, or incumbents with lots of resources and strategic capacity. The unique contribution of a theory of strategic capacity is to offer a way to explain the

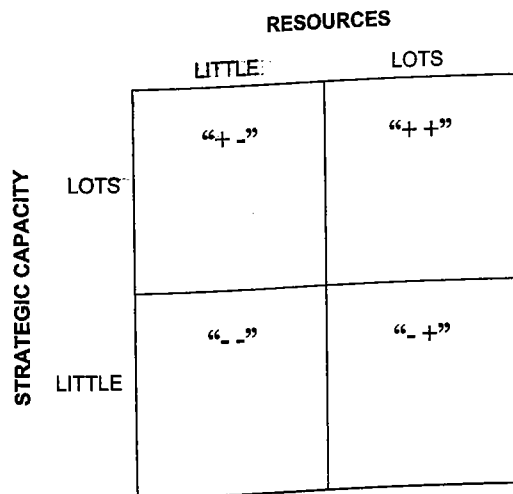


FIG. 10.3. Strategic capacity and resources.

less frequent but—from a social movement point of view—more interesting outcomes of David winning and Goliath losing without resorting to accounts grounded in opportunity and resources that rob actors of their agency. By selecting cases based on variation in resources and strategic capacity we avoid the problem of selection on the dependent variable, success. Strategic capacity could be tested by comparing a set of cases with observable variation in independent variables of resources and strategic capacity and the dependent variable of success. To the extent that strategic capacity co-varies with success, the theory would be upheld. To the extent it does not, it would be falsified.

## CONCLUSION

This chapter began by asking why “David” sometimes wins. Organizations can compensate for lack of economic, political, or cultural resources with creative strategy, a function of the motivation, access to a diversity of salient information, and heuristic facility with which their leadership teams interact with their environment. Changing environments generate opportunities and resources, but the significance of those opportunities or resources—and even what constitutes them—emerges from the hearts, heads, and hands of the actors who develop the means of putting them to work. People can generate the power to resolve grievances not only if those with power decide to use it on their behalf, but also if they can develop the capacity to outthink and outlast their opponents—a matter of leadership and organization. As an “actor-centered” approach, analysis of strategic capacity suggests ways to design leadership teams and structure organizations that increase the chances of devising effective strategies to deal with the challenges of organizing, innovation, and social change today. As students of “street smarts” have long understood, resourcefulness can sometimes compensate for a lack of resources. Although learning about how the environment influences actors is important, learning more about how actors influence the environment is the first step not only to understanding the world, but changing it.

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# III

## Consequences of Leadership