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Title: Perceiving the organisation through a coding scheme : The construction of managerial expertise in organisational training

Year: 2023

Version: Accepted version (Final draft)

Please cite the original version:

Nissi, R., & Lehtinen, E. (2023). Perceiving the organisation through a coding scheme : The construction of managerial expertise in organisational training. Pragmatics, Online First. https://doi.org/10.1075/prag.21050.nis

Perceiving the organisation through a coding scheme: The construction of managerial expertise in organisational training

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Abstract

In contemporary organisations, managerial expertise is increasingly viewed as an ability to reflect on activities, processes and human relations within organisational life in order to gain a systemic understanding of the workings of the organisation. This article examines the interactional practices of a consultant led management training where steering groups of an organisation have a task of gaining such expertise. The article investigates how managerial expertise is constructed and negotiated in training interaction as the groups categorise their managerial actions through a specific coding scheme. The analysis shows that the use of the coding scheme is contingent on being able to display access to organisational processes and activities, connecting general managerial knowledge to specific, local knowledge of the organisation and moving from 'knowing-that' to 'knowing-how' type of knowledge.

Keywords: knowledge, expertise, professional interaction, management training, organisational consulting, coding scheme

1 Introduction

In contemporary organisations, management practices are increasingly related to shaping the flows of information, ideas and resources for the sake of organisational success. This means that the managers of the organisation are expected to reflect and analyse organisational activities, processes and human relations in order to gain a systemic understanding of the workings of the organisation that, in turn, forms a basis for short- and long-term decision making. These views can be traced back to a shift from positivist management models towards relational and constructivist approaches that emphasise the situated and interpersonal nature of organising and leadership (e.g. Cunliffe and Eriksen 2011).[1] In constructivist management literature, managing organisation has been referred to as "critically reflexive practice" (Cunliffe 2016) that takes into account the socially constructed nature of the social world and recognises the ways in which organisational realities are embedded in everyday social encounters. Similar to other practitioners, the managers of the organisation thus have to learn to view their social worlds in socially organised ways that form the basis of their professional scrutiny, namely, allow them to perceive how organisation as a living system is constituted and steer its course accordingly.

In this paper, we approach this special kind of organisational perception as the core essence of managerial expertise and examine how it is developed in the context of management training and organisational consulting. More specifically, by drawing on ethnomethodological and conversation analytic approach, we analyse the ways in which the managers' *tacit knowledge concerning their organisation* is transformed into *codified knowledge concerning managing* in and through situated training practices.

Our data come from a management training where the steering groups of an educational organisation took part in the training program provided by a consulting company specialising in management and organisational development. In terms of managerial expertise, the training context of our data represents a complex setting for two reasons. Firstly, the

[1] The notions of 'management' and 'leadership' have been conceptualised in various ways in prior research. Although they have also been used synonymously often the first one is associated with decision-making and directing organisational processes, whereas the latter one has been associated with envisioning new directions and motivating people (e.g. Algahtani 2014). In this article, we use the term management due to the core task of the steering groups, that is, steering organisation as a system even though their work also entails elements of leadership.

consultant delivering the training is not familiar with the client organisation or their specific field, resulting in the negotiation of knowledge between different professions and the relevance of that knowledge. As noted in prior research, organisational consulting is typically based on the prevailing management theories (Czarniawska and Massa 2013) which are renewed and disseminated in the training, the primary site of consulting (Nissi & Hirsto 2021). However, throughout its history, consulting has also faced criticism and challenges regarding its legitimacy (Von Platen 2018). This is particularly the case in contemporary organisations where the consulting practice emphasises the client's own agency and focuses less on providing solutions to the clients' problems than assisting the clients in their own professional reflection (Nissi & Hirsto 2021). Secondly, although all the steering groups include a headmaster who has a formal managerial position in the organisation, the groups operate on the principle of distributed leadership and all the group members take part in organisational sense- and decision making, resulting in the negotiation of their mutual knowledge concerning the organisation.

In this paper, we investigate how these negotiations of knowledge become visible in training interaction as the steering groups accomplish the training assignment where they learn to classify their own managerial actions with the help of the coding scheme provided by the consultant. Therefore, we adopt an interactional perspective on expertise and show how managerial expertise as a nexus of different kinds of knowledge is composed and shaped by the training participants as they publicly display and update their understanding of the coding scheme on a turn-by-turn basis. Our paper thus contributes to previous research on the interconnections between knowledge, expertise and social interaction (see Arminen, Koole and Simonen 2021). In particular, it sheds light on the interactional practices of organisational consulting and management training as an institutionalised format for producing expertise concerning organisational management.

2 Knowledge and expertise in professional contexts

Categorising and coding are an intrinsic part of professional practice and the work of many professionals is thus highly dependent on the classification of specific phenomena, such as diseases in medical professions (see Bowker and Star 2000). In social interaction, categorising and coding can be seen in the use of various coding schemes, identified by Goodwin (1994) as a central aspect of professional expertise. Coding schemes are often materialised as textual and visual objects, such as tables, grids or forms that the professional

is expected to fill in a context-relevant way. A case in point is Goodwin's (2000) own study on archaeologists' practices in categorising dirt, its colour in particular. The categorisations are written on a form, and the archaeologists use the Munsell colour chart in determining the colour of the dirt. In the medical field, Slack et al. (2007) have shown how, in mammography, doctors use a detailed form to mark what they see in the scan. In airports, security operators similarly use a classification system in screening X-ray monitors for different kinds of security threats (Bassetti 2021). Such tools are also employed extensively in management practices. For example, Hughes et al. (2002) investigate how managers in a bank make sense of the performance of their departments to upper management with what they call the "Management Information Pack" where information is compiled in specific ways.

In our management training data, the consultant also provides the trainees a special kind of textual aid – a fillable grid – in order for them to make sense of their organisational reality through coding. In our analysis of training interaction, we show how the participants orient to three different aspects of knowledge in filling the grid: the nature of access to the knowledge, domain of knowledge, and the distinction between knowing-that and knowing-how. In this section, we will review earlier studies of these dimensions of knowledge, and make remarks on how they are related to expertise in general and coding as an expert practice.

Access to knowledge has been an important feature of conversation analytic discussions of epistemics. In her classic paper, Pomerantz (1980) divided our rights to know things into two categories. Type 1 knowables are those to which there is first-hand access, experience of what one is talking about whereas type 2 knowables are topics where the speaker does not have first-hand experience. This distinction has been shown to be important in professional contexts. For example, Gill (1998) has shown how, in the medical context, the patient is treated as knowledgeable vis-à-vis her/his experience, while the doctor's sphere of knowledge has to do with medical knowledge of, for example, the causes and effects of illnesses. Studies of coding practices show how access is an important prerequisite to doing the coding. For the archaeologists, for example, access to the dirt is extremely concrete: in order to investigate the colour of the dirt, they hold the specimen in the viewing holes of the Munsell chart with their trowel and compare the colour of the dirt to that of the chart (Goodwin 2000). Readers of mammograms (Slack et al. 2007) or airport security (Bassetti 2021) have access to the object of scrutiny through images.

Hughes et al. (2002) show how access is also important in the management context: the managers compile management information packs about their own area of responsibility and are expected to know what goes on there. In a similar vein, Angouri and Bargiela-Chiappini (2011, 214) maintain that decision-making in organisations is inextricably connected to "the local history of workplaces". The issue of access may, however, be complex in the workplace setting as it has to do with immaterial experiences and entail work-related knowledge about how work tasks have been accomplished in the organisation. Moreover, such experience may be oriented to not only as part of the managers' but also other personnel's expertise and used, for example, as a basis for resisting organisational changes (see Nissi and Lehtinen 2016). In the case at hand, the trainees display their access to knowledge of and experience in their organisation as they fill in the grid and negotiate about its content.

The second dimension that we want to highlight is that of knowledge being related to specific domains. Heritage (2012) addresses this issue through the concept of 'epistemic status', namely, socially sanctioned restrictions on who is entitled to know about which issues or domains of knowledge. This is related to the question of experience, as it can be thought that experiences are the knowledge domain of the person with the experience, but the question of epistemic status has wider repercussions as different professionals are usually treated as having epistemic rights with regard to their professional domain. Rights to specialised knowledge is what Sarangi and Roberts (1999; also Sarangi and Candlin 2011) see as the core of professions. This is highly relevant for professional coding practices in that the coding tools often epitomise the professional domain with its specific perspective on the issue. For example, the screening reporting form in the mammography screening contains information that is deemed relevant from the medical perspective.

The domains of knowledge become especially salient in multiprofessional contexts where different professionals are expected to contribute to the tasks at hand from their own perspective (e.g. Housley 2003). Workplace teams are often put together in order to achieve multiprofessional co-operation (Angouri 2018). In such contexts, professional domain may be intertwined with the issue of access, having or not having experience of the workings of an organisation. A case in point is Nissi and Lehtinen's (2016) study of PowerPoint presentations in workplace meetings having to do with a development project, in which both the presenters and the audience are professionals. The presenters, however, are outside

experts, while the members of the audience are employees from various units of the organisation. They are treated as knowledgeable vis-à-vis their respective professional domains, but importantly, also, through having experience of working in the organisation. The presenters orient to this expertise through asking questions about the experiences of the audience members, and the employees themselves sometimes draw on their experiences when making critical comments vis-á-vis the presentations. A somewhat similar case is Svennevig's (2011) study of employees' reports to the superior about their areas of responsibility in an intra-organisational meeting: the superior's access to the topic of the reports is treated as more indirect than that of the employees. This is seen in how the superior makes requests for clarification before he diagnoses the situation and gives directions. The intertwinedness of professional domain and access is highly relevant in our case. While the consultant is treated as primarily knowledgeable vis-á-vis the managerial knowledge in the coding scheme embedded in the assignment, he lacks access to the processes of the particular organisation where that knowledge should be applied.

Lastly, we come to the third dimension of knowledge that we see as relevant in coming to terms with expertise, namely, the distinction between 'knowing-that' and 'knowing-how'. This distinction has been famously presented by Ryle (1945-1946), who argued that these forms of knowledge are distinct in that knowing-how cannot be reduced to knowing-that as doing things in a skillful way is not an operation of blindly applying a known set of facts. Instead, the expert performs the activities themselves in a skillful way. The problem of knowing-how has also been central in ethnomethodology. Garfinkel (1967), in his early writings, was interested in 'ethnomethods', that is, the procedures through which people accomplish their – both lay and professional – daily activities. Such procedures can take a myriad of forms. For example, Sarangi (2010) sees professionals' interactional skills as an example of this kind of knowing-how. As Holmes and Woodhams (2013) show, learning appropriate ways of talking and interacting is an important part of becoming part of a professional community. At the same time, knowing-how may entail physical activities such as handling dirt with a trowel by an archaeologist (Goodwin 2000). Professional procedures are important with regard to coding practices as well. Arriving at a professionally appropriate code or filling a form in an appropriate way is the result of professional techniques, practices and negotiations. For example, Slack et al. (2007) describe the techniques such as magnifying or measuring some parts of the pictures that professional readers of mammograms use in order to make sense of the pictures. Williams (2007), in his study,

shows the methodical character of how crime scene examiners make sense of what they see in the scene. Hughes et al. (2002) describe how arriving at a particular management information pack is an accomplishment where material from a wealth of different sources is weaved into a coherent story.

The centrality of knowing-how does not, however, make knowing-that unimportant. Professionals also orient to explicitly stated principles and 'facts'. Often what is in the forms, tables or grids is this kind of theoretical knowledge. For example, the Munsell chart can be seen as that kind of knowing-that theoretical knowledge that is turned into practical knowledge through the expert work of the archaeologists (see Goodwin 2000). As we already noted, such a material aid is used in our data as well. The consultant presents the relevant managerial knowledge in the form of a fillable grid that entails a specific coding scheme. Using this aid, however, requires skill as it is not just a mechanical task of marking down certain organisational phenomena but rather a complex activity of learning to perceive those phenomena in everyday organisational life with the help of the scheme. This is the kind of skill the trainees in our data are learning to master as part of their managerial expertise: how to apply a coding scheme entailing general, theoretical knowledge to the local conditions of their particular organisation. Managerial expertise is, thus, for us, the skill of applying theoretical managerial knowledge to the everyday reality of the particular organisation the manager is in charge of.

3 Data and method

Our data come from a management training where steering groups of a Finnish educational organisation – a school district responsible for providing comprehensive education – took part in the training and development program provided by a private consulting company. The overall target of the training was to advance participatory leadership culture within the organisation. The training lasted for eight months and was arranged as specific training days that took place at schools or external meeting premises and were attended by 1-2 consultants and 80-250 trainees, namely, employees that came from different schools and represented their steering groups with 5-6 members each. The steering groups were led by headmasters who typically had some management qualification while other steering group members were school teachers. Although the headmaster was officially in charge of the organisational decisions, the issues related to those decisions were discussed in steering group meetings and in some schools the other group members were in charge of other workgroups. In collecting

the data, all the training days were observed ethnographically and video recorded in their entirety, leading up to 45 hours of video data. In video recording, three steering groups and the consultant were followed more closely by using several cameras and separate microphones.

During the initial analysis of the data we noticed that all the training days were based on regular activities such as the consultant's lectures and group assignments. Especially the latter ones were very salient throughout the data and took the most part of the time during the training days. In group assignments, (1) the consultant issued to the groups a request to reflect on their professional practices and (2) the groups undertook the task and discussed the given issue. All the assignments aimed at enhancing the managerial expertise of the trainees but focused on different aspects of managerial work depending on the theme of the training day. In this article, we focus on an assignment that took place during the training day that focused on managing wellbeing at work. This particular case was chosen for a more detailed analysis for the reason that in that the consultant provided a material coding scheme for the use of the trainees, and this, in turn, made the situated negotiation of knowledge and expertise very perceptible. For the analysis section, we have chosen excerpts from different phases of the process of carrying out the assignment to best illustrate the before mentioned negotiation.

Methodologically, we rely on multimodal conversation analysis. This means, foremost, that we conduct a sequential analysis of the data (see Schegloff 2007). Sequentiality can be seen in the training activity in two ways. Firstly, we analyse the design of the consultant's request turn and what kinds of interactional trajectories it creates for the accomplishment of the assignment (cf. Levinson 2013). Secondly, we look at the sequential unfolding of the actual group discussion as the trainees respond to the consultant's request and orient towards accomplishing the task given. Regarding expertise, the training activity thus brings forth the dual negotiation of knowledge peculiar to the training setting – between the consultant and the groups as well as between the group members.

A multimodal perspective, for its part, means that we do not only look at the spoken contributions of the participants but also how embodied action such as gaze, gestures, and handling of physical objects contribute to the sequential activity (see Mondada 2016; Nevile

et al. 2014). This is because, as mentioned above, we focus on a case where the consultant's request is delivered both verbally and visually in the form of a coding scheme. This coding scheme is presented as a table and projected on the screen of the training hall as well as drawn by the groups on a sheet of paper (see Table 1).

	REACTIVE	CONSCIOUS/ PREVENTIVE	SUCCESSFUL/ FOCUS ON RESOURCES AND SUCCESSES
HEALTH	. recognizes the illnesses of individuals/organisation . takes care and heals . rehabilitates	. recognizes indisposition . recognizes the factors causing indisposition . dissolves the factors causing indisposition	. recognizes well-being . recognizes the factors causing well-being . strengthens the factors causing well-being
EFFICIENCY	. focuses on morbidity, reclamations and accidents . measures deficiencies	. measures the risks of inefficiency	. recognizes efficiency . advances factors that lead to efficiency . measures efficiency and monitors success
PROFITABILITY	. tries to avoid loss . takes action after unpleasant things have happened	. recognizes unpleasant things beforehand and tries to avoid them	. focuses on genuine things that effect long-term profitability, quality, work enjoyment and reputation

Table 1. The grid used in the training

The table presents a classification of managerial actions related to well-being at work: in the columns, these actions are divided with regard to the measures taken ('reactive', 'preventative' and 'successful' actions) while in the rows they are divided with regard to the dimensions of well-being (actions that have to do with 'health', 'efficiency' and 'profitability'). In the request, the consultant asks the groups to reflect their own organisational issues and managerial responses – discussed already earlier during the training

day – and place them in the right boxes.[2] In the analysis, we will examine how the grid as a textual artefact entailing a specific coding scheme is used as a resource for setting and accomplishing the training assignment but also treated as troublesome by the groups, thus forming a material basis for the negotiation of knowledge and expertise within the training activity.

4 Construction of managerial expertise through the task assignment

In the following sections, we will examine the interactional construction of managerial expertise from the viewpoint of access, domain and know-how within the task assignment of the training. The subsections of the analysis are thus organised according to the sequential unfolding of the assignment. At first, we will analyse the way the consultant formulates the request that projects the accomplishment of the task and topicalises the coding scheme of the grid. After that, we will focus on the actual accomplishment of the assignment and examine the ways in which the group members orient to filling in the grid and organise their mutual work through specific interactional practices.

4.1 Constructing coding as a learning object

As mentioned, in the training, the assignment is introduced by means of a grid that is projected on the screen of the training hall and referred to by the consultant in his request turn. In this way, the coding scheme of the grid is embedded in the consultant's verbal task assignment and its use is construed as a learning object for the groups. This is shown in Extract 1 where the consultant[3] at first initiates a topical shift and introduces the upcoming activity as merely decision-making (line 1), but then specifies that it has to do with the 'classification' of the decisions (lines 1-2).

(1)

01 C: *lähetään (0.3) kohti ↑päätöksentekoa ja (.) ja hyvinvointipäätösten*

let's move (0.3) to ↑decision making and (.) and (0.3) er (.) classification

[2] The same task is repeated three times on consecutive training days with different participants. Our data includes these three different versions of the same task. However, for the sake of clarity, our data excerpts come from the same group.

[3] In data extracts, the consultant = C, the headmaster = H, other steering group members = S1, S2 etc.

02 *johtamisen (0.3) öö (.) jäsentämistä? ((words omitted))*

(0.3) of the management of the decisions that have to do with well-being?

*POINTS TO THE GRID PROJECTED ON THE SCREEN

03 **tämmönen jaottelu että (0.3) teidän keskustelut (0.4) pohdinnat*

*this kind of categorisation (0.3) your conversations (0.4) reflections

04 *tulevaisuudesta tän hetken ilmiöistä (.) jos niitä (0.3) lähtisitte nyt*

about the future the current phenomena (.) if (0.3) you would now begin

05 *↑johtoryhmänä lukemaan ja luokittelemaan hieman*

to read and classify them a bit as a ↑steering group

((lines omitted: C goes gives an overview of each box))

06 C: *tässä joutuu ajattelemaan tämmöstä organisaationäkökulmaa. (.) se ei oo*

here one has to think this kind of organisational perspective. (.) it is not

07 *se arkisin näkökulmah. (0.3) se on johtamisen näkökulma ((words omitted))*

the most mundane perspective. (0.3) it is the management perspective

08 *jos saa helpommin kiinni siitä että (.) .hh on tämmösiä*

if you can more easily capture the idea that (.) .hh there are these kinds of

09 *reagoivia toimia (0.4) ennaltaehkäseviä toimia (0.3) ja vahvuuksia eteenpäin*

reactive activities (0.4) preventive activities (0.3) and actions (.) that take

10 *vieviä (.) tekoja (0.3) hyvinvoinnin rakentamisessa .hh (.) niin (.) tekee vaikka*

the strengths further (0.3) in building well-being .hh (.) then (.) you do

11 *tän kolmijaon. ((words omitted))*

for example this three part categorisation.

((lines omitted: C gives another example how the task can be done in an easier way))

12 C: *toivoisin että (.) että (.) kysytte tässä kohdassa vähän tarkennuksia tai*

I wish that (.) that (.) you will at this point ask for some clarification or

13 *(0.3) viittailette vaan mä voin tulla pöydän äärelle kiertelemään kanssa*

(0.3) just raise your hand I can also come to walk around the table

While presenting the learning object, the consultant displays an orientation to all three dimensions of expertise, and juxtaposes the groups' knowledge with his own. In terms of domain and knowing-how, we can see how they are intertwined with the consultant's request from the very beginning. In introducing the task, the consultant uses a specialised lexicon that not only implies the application of a 'scheme' of some sort but also positions this scheme specifically to the managerial domain. As the consultant then opens up the before mentioned grid on the screen and points to it (line 3) he provides a model for the abstract notion of 'classification' through material-discursive means. In presenting the coding scheme, the consultant connects the grid and the information it entails more specifically to the managerial domain, and by so doing, treats it as previously unknown to the audience. Thus, in showing the grid, he uses the indefinite marker *tämmönen* 'this kind of' (line 3) which has an introductory function. Introducing the grid is followed by a directive *jos niitä lähtisitte nyt* 'if you would now begin' where the consultant urges the groups to connect their previous conversations during the training event to the grid through first reading their notes of those discussions and then 'classifying' the phenomena identified in them (lines 3-5). In this way, he makes it known that the steering groups have knowledge that is relevant to the task – if coded in the right kind of way. This kind of knowledge requires access to the everyday reality of the specific organisation.

Next, the consultant elaborates the managerial domain by making a distinction between mundane and managerial perspective (lines 6-7). In this way, he also creates more visible knowledge-related hierarchies by presenting the managerial perspective as a more laborious

one with the use of a modal verb *joutua* ‘has to’ (line 6), implying that the groups have to specifically work towards it. Here, he also modifies the earlier request by suggesting only partial accomplishment of the task (lines 8-11), and by so doing, anticipates that the groups may have problems in accomplishing the task. Importantly, the kind of trouble he foresees has to do with ‘capturing the ideas’ (line 8) in the grid. He thus indicates that there may be difficulties in grasping the managerial knowledge system epitomised by the grid. Finally, the consultant constructs for himself an epistemic authority regarding the managerial domain by offering help (lines 12-13).

All in all, we can see how the consultant presents the coding assignment in a way that is accordant with the institutional aims of the training and the consulting practice. By doing so, he displays his understanding of the kind of managerial expertise the trainees should be learning. Crucially, this expertise requires knowing-how: the practical activity of combining the grid’s knowing-that knowledge, related to knowledge about managerial actions in general, with the group members’ experience concerning their everyday work. Through portraying the task as difficult because of anticipated problems with understanding the managerial concepts of the grid, and through offering help in interpreting them, the consultant positions himself as more knowledgeable than the trainees with regard to the managerial domain. On the other hand, however, he portrays the trainees as knowledgeable vis-á-vis everyday work in the organisation in question, as (only) they have access to it through experience. The design of the request thus implies that the expert work of applying the managerial knowledge to practice can only be done by the trainees.

4.2 Attempting to fill in the grid

The consultant’s request is followed by group work where the steering groups orient to carrying out the task assignment. Sequentially, the group work consists mainly of questions and answers or proposals and acceptances/rejections. Through these sequential structures the participants of the group negotiate about their answers to the request. At the same time, they display their access to different kinds of knowledge needed in the task.

As the consultant’s request has been intertwined with the presentation of the grid, the steering groups respond to the task as a form filling activity and orient to finding suitable words for each box. In this way, the grid as a textual object functions as a resource for organising talk and action similar to many other institutional settings (see e.g. Nissi 2015). This is

demonstrated in extract 2 where the steering group is just at the onset of their group work and orients to organising it according to the textual structure of the grid, starting from the first box at the junction of ‘health’ and ‘reactive’ (lines 1-14).

(2)

01 S1: *no ↑reagoiva (.) ois nyt toi (.) sisäilma esimerkiksi (.) >mitä me tehään*
well the ↑reactive (.) would be (.) for example indoor air (.) >how are we dealing

*GAZES AT S2

02 *sille< (.) *terveyden suhteen.*
with that< (.) *in terms of health.

03 (0.4)

04 S2: *niin no nyt [meillä on tänään (alottanu)]*
yes well [today we have (started)]

05 S1: *[tai kaikki ne mitä me rea]goidaan siihen nyt [ko]ko [ajan.]*
[or all those ways we currently rea]ct to it [al]l the [time.]

06 S2: *[nii.] [nythän]*
[yes.] [well now]

07 *meil on [alot-] (.) (sittehän) on rea (.) goitu niin että (0.3) .hh niitä on tehty*
we have [star-] (.) (now) it has been reac (.) ted so that (0.3) .hh the notifications

08 S1: *[nii.]*
[yes.]

09 S2: *jatkuvasti niit ilmotuksia ja [kil]pailutusten johdosta se nyt*

have been continuously made and due to the [com]petetive tendering it has now

10 S1: *[mm]*

11 S2: *alkoi tänään se*

started today

*PREPARES TO WRITE

12 **S**1: **↑mä laitan tähän (.) remontti. (0.3) vai [mitä mä laitan.]*

*↑I will mark down here (.) the renovation. (0.3) or [what shall I mark.]

13 S2: *[e:: e::] ei. (0.3) vaan tutkimukset.*

[n:: n::] no. (0.3) but the investigations.

*PREPARES TO WRITE AGAIN

14 S1: *tutkimukse*t.*

investigation*s.

((lines omitted: the group members continue filling in the grid chronologically))

15 S1: *↑tehokkuus on sitten (.) keskittyy (1.1) ööm (.) öö em mä ymmärrä.*

↑efficiency is then (.) focuses (1.1) err (.) er I don't undertand.

In their work, the group members attempt to identify organisational phenomena that would fit the descriptions of the boxes. On line 1 S1 – who acts as the writer of the group – produces a turn where she provides an organisational phenomenon, 'indoor air' that she presents as relevant with regard to the category 'reactive' in the grid. Through using the pronoun *toi* 'that' she displays that she treats this phenomenon as unproblematically recognisable to the group and thus marks all the group members' access to it. By going first, she can, however, be seen to reserve for herself an epistemic authority in terms of the issue at hand (cf. Heritage and Raymond 2015).

Nevertheless, in order to proceed with the task, S1 requests help from others. She continues her turn and addresses a question to other group members, more specifically to S2 who she gazes at, thus selecting her as the next speaker (lines 1-2). The question specifies that she is not only asking S2 to identify any measures that have to do with indoor air but specifically those that deal with health issues – and thus seemingly uses the visual order of the grid as the basis of the conversation. Thus, even though S1 can easily find an organisational phenomenon that is relevant vis-á-vis the assignment, she displays that she needs help with regard to the knowing-how aspect of expertise, linking the phenomenon to the managerial knowledge represented in the grid. Through addressing S2, S1 also constructs for herself a position of the non-knowledgeable participant while treating S2 as the most knowledgeable group member regarding the managerial actions in question. S2 responds by providing more information about the measures taken in the organisation, such as 'notifications' and 'competitive tendering' (line 9), thus accepting the position offered to her. The extract shows how the group members' expertise is not dependent on their organisational positions in any straightforward manner – S2 not being a headmaster – but rather interactionally accomplished and linked, for instance, to the members' first-hand access to recent organisational events.

On line 12, S1 has gathered enough information in order to proceed to writing. However, her proposal about the 'writeable fact' is corrected by S2 through direct other-initiated repair (line 13) that underlines her epistemic authority in the matter under discussion. On line 14, S1 prepares to write down the corrected 'fact'. Writing thus acts as a concluding action in the sequence and seals the negotiation.

However, while acting as a resource for organising talk and action, the grid also creates interactional trouble similar to other form-filling settings where the participants are expected to establish a link between the descriptions of the standardised form and their own life-world (cf. Simonen 2012). On line 15, S1 attempts to move to the second row in the grid and begins to fill in the first box on the row at the junction of 'reactive' and 'efficiency'. She initiates a topical shift by producing a turn that seems like a definition *(↑tehokkuus on sitten* '↑efficiency then'), but stops, quotes the text in the box (*keskittyy* 'focuses') and displays confusion through vocalisations (*ööm öö* 'err er') and an expression of non-understanding (*em mää ymmärrä* 'I don't understand'). Therefore, while proceeding with the task, S1 no longer treats the descriptions of the grid as self-explanatory but instead displays trouble in trying to define and understand the terms used.

As other group members also display non-understanding (not shown in the transcript), the group decides to request help from the consultant as suggested by him in the initial task setting. By carrying out the anticipated action, the group members orient to the consultant's epistemic authority regarding the managerial domain modelled in the grid. However, the request for help also functions as a means to resist the task and its usefulness. This can be seen in extract 3 where the consultant arrives to the group and S2 verbalises the trouble in accomplishing the task (lines 1-3). Her pointing gesture locates the trouble specifically within the textual object while in her turn she questions the relevance of the task by using the verb *hyödyttää* 'benefit'. In other words, instead of, for example, requesting help in interpreting the terms used in the grid, S2 calls into question the applicability of those terms. This conceptualises the difficulties specifically as problems of knowing-how, not understanding how the concepts used fit their own organisation.

(3)

*POINTS TOWARD GRID

01 S2: *me ei *tavoteta tätä tehtävää nyt, [eikä löydetä] sitä et mitä me hyödytään*
we can't now get a hold of this assignment, or find how we benefit

02 H: *[iha oikeen,]*
[quite fully,]

03 S2: *nyt täst, ja miten me tää tehdään.*
from this, and how we do this.

04 C: *elikkä siinä oikeetaan tän (0.3) organisaation eli koulun näkökulmasta mietitte*
so here you kind of (0.3) think from the viewpoint of this organisation namely school

05 *että (.) et (ku) teillä on hyvinvointiratkasuja pohdittu ja varmaan tossa*
(.) that (since) you have had reflections concerning well-being solutions and have

06 *synty[(ny)] (.) ootte kuullu [tai] tässä ootte miettiny (.) .hh ni*

probably [come up] with them here (.) have heard or thought about them (.) .hh

07 H: *[joo?]*

[yeah?]

08 (?): *[mm]*

09 C: *kuinka niitä vois olla nä- (.) kuinka niihin vois ottaa erilaiset näkökulmat*

so how could they be pe- (.) how could one take different perspectives on them

((lines omitted: C explains 'reactive' actions by using an example from a construction site: if someone gets a nail in the foot, reactive actions are needed))

10 C: *ja sitten on tavallaan tämmösiä ennaltaehkäseviä asioita, jos te huomaatte*

and then there are in a way these kinds of preemptive things, if you notice

11 *että okei että (0.2) et jos me tota noin (.) öö aletaan hoitamaan sitä että*

that okay that (0.2) that if we uhm (.) er begin to take care of

12 *ihmisillä on turvakengät rakennuksilla jal(h)assa.*

people having safety shoes on in construction s(h)ites.

((lines omitted: the consultant elaborates his explanation))

13 C: *ja sit täytys miettiä iha eri näkökulma että okei no miten me*

and then you should consider a totally different perspective like okay how do we

14 *rakennetaan sit tämmösii jotka tekee (.) että (.) riittääkö tää*

then build these that do (.) that (.) is this enough

15 *hyvinvoinnin huippusuoritukseen et meillä ei mee naulat jalkaan.*

for a top performance in well-being that we don't get nails in our feet.

((lines omitted: the group members suggest concrete things they could write in the first two columns of the grid, C accepts))

16 C : *tämmönen (.) näkökulma jolla [teiän jo]htamistoimenpiteille tulee vaan vähä (.)*

this kind of (.) perspective with which you just get a little more (.)

17 S1: *[okei,]*

[okay,]

18 C: *eri skaalautuvuutta täs[sä.]*

scalarity for your managerial practices he[re.]

19 S1: *[joo]:, (0.6) joo, (.) ↑kiitos,*

[yea]:h, (0.6) yeah, (.)↑thanks,

20 S3 COVERS RIGHT SIDE OF FACE WITH HAND, WHISPERS TO S4, THEN ROLLS EYES

The consultant begins to resolve the problem by reiterating the idea of the assignment: the group should reflect their managerial actions related to well-being and try to find 'different perspectives' on them, namely, classify them with the help of the grid (lines 4-9). Next, the consultant elaborates the three-part classification presented in the columns of the grid. In the initial task assignment, he has suggested filling only the columns and now clarifies the grid according to this less demanding option, thus again projecting certain capabilities to the group members. At first, he explains 'reactive' actions (not shown in the transcript), then 'preventive' ones (lines 10-12), and finally the 'successful' ones (lines 13-15). The third category of actions he describes as 'a totally different perspective', implying that this final categorisation requires thinking that may be particularly challenging for the trainees.

However, as the group has particularly displayed difficulties with the knowing-how aspect of the task, the consultant is expected to connect the descriptions of the grid to practical matters. Accordingly, he picks up an example from the domain of work, but the example comes from a different kind of organisation, a construction site: the consultant explains the three-part classification through the provision of safety shoes on construction work. By using a hypothetical example he avoids claiming access to this organisation and the educational domain. At the same time, he implies that the knowing-that knowledge of the grid is general, independent of the type of organisation in question, and thus applicable to any organisation.

In responding to the consultant's explanation, the group members display their understanding by suggesting kinds of issues that could be inserted in the first two columns, but as for the third column, they do not display understanding in any clear way (not shown in the transcript). After the consultant recaps what he means by different level decisions (lines 16-18), the group members respond with response particles and thanking (lines 17, 19) whose prosodic features seem to imply problematicity: they close the sequence with the consultant very noticeably but are immediately followed by whispering among the group members, and an eye roll by S3. Thus, indirectly, the group members still display resistance towards the task and the coding scheme, particularly the third category of the grid.

In this section, we saw how the group members approach their coding task mainly as a form filling activity, taking the managerial knowing-that knowledge epitomised by the grid as a starting point and attempting to fit their organisational knowledge to it. The group work unfolds largely through proposals, questions, and responses to these actions through which the group members display their access to organisational phenomena and thus negotiate their mutual knowledge with regard to the task given. However, although the grid functions as a resource for organising talk and action it is also treated as troublesome by the trainees, who show difficulties in understanding the managerial concepts embedded in the grid, and more importantly, connectinging these concepts to the organisational phenomena. This becomes particularly clear when the group requests for help from the consultant and displays resistance towards the task. The consultant's response highlights the knowledge-related dilemma of our training data: consulting takes place at the intersection of different knowledge systems and although the consultant is treated as an epistemic authority with regards to managerial domain and the knowing-that type of knowledge of the coding scheme, he does

not have access to the organisation of the trainees. Therefore, he cannot directly help the trainees with their core problem, the knowing-how type of knowledge of the coding scheme.

4.3 Adjusting coding to the organisational reality

In previous chapters, we have analysed the interactional practices of organisational consulting and management training, and in particular, the dilemmas it entails as an institutionalised format for producing expertise concerning organisational management. In our data, at the core of the problems is the grid, the material-discursive form of the coding scheme offered by the consultant. In this chapter, we will show how these problems are finally overcome through the interactional structures of group work, namely, questions, proposals and responses to these actions. In terms of the managerial expertise, this means that the group members discover a way of applying the coding scheme and display the kind of expertise that is sought for in the task. However, their – at least partial – success in doing it is enabled by taking distance from the grid. This is illustrated in extract 4, where the group picks up the group work after the visit of the consultant. Prior to the extract, S2 has stated that the task has not provided any novel insights and asked other group members what they should discuss in order to use the time usefully.

(4)

*POINTS TOWARD POST-ITS
ON THE FLOOR

01 S1: *(no se) (.) ↑jos me otettais semmosii muutamii pääpointtei *täältä mitä meillä*
(well) (.) ↑if we took a few of those main points that have been

02 *on noussu.*
raised.

03 S2: *meiän niinku oikeesti semmoset akuuteim[mat] ongelmat.*
like our really most pressing problems.

04 S1: *[nii.]*
[yes.]

*RAISES HANDS, PALMS UP

05 S1: *nii, (0.7) *mitkä ne on.*

yes, (0.7) what are they.

06 S2: *no mä sanoisin et se ainakin se al- (.) alakoulun se (.) ilmapiiri.*

well I would say that the at least the at- (.) atmosphere of the (.) elementary school.

07 S1: *nii-i, kyllä,*

yes, exactly,

((lines omitted: the participants jointly elaborate how poor atmosphere is manifested))

08 H: *(tavallaan) mä näen (.) näen siinä on tosiaan ha- haasteena nimenomaan*

(in a way) I see (.) I see that the cha- challenge specifically at the side of the

09 *tuolla alakoulun puolella mikä tuottaa niinku (.) .hh semmosta yleistä*

elementary school causing like (.) .hh a kind of general

10 *jaksamattomuutta on semmonen niinku et tavallaan siel on (0.3) melko*

weariness is kind of like the thing that there are in a way (.) fairly

11 *kokemattomat opettajat ja kaikkein hankalimmat oppilaat*

unexperienced teachers and the most difficult pupils

((lines omitted: H elaborates how general weariness is manifested))

12 S2: *ja se on ollu sillai et syksystä asti*

and it has been so that since the autumn time

13 *sit se ilmiö että (0.3) et siel on ne opettajat jotka pärjää*

there has been the issue that (0.3) there are teachers who handle

14 *työssään (.) ja niitä <hermostuttaa> [(.) n]e jotka ↑eivät pärjää*

their work (.) and they get <annoyed> [(.) with tho]se who ↑can't handle

15 H: *[nii.]*

[yes.]

16 S2: *työssään koska heidän oppilaansa kuormittaa sitte tavallaan hei[dänkin] työtä.*

their work because in a way their pupils then put a strain on th[eir work too.

17 S1: *[mm:].*

((lines omitted: S2 elaborates how the two groups of teachers act in the school))

*POINTS AT FIRST COLUMN OF THE GRID

18 S2: *mut *si- (.) sit (.) et nää keskustelut keskenään (.) e- olis niinku tavallaan*

but the- (.) then (.) these conversations between each other (.) er would be like

*MOVES HAND ALONG FIRST COLUMN OF THE GRID

19 *sitä (0.7) *reagointi? >tai siis< keskustelut näitten henkilöiden kanssa*

part of the (0.7) reacting? >or> the conversations with these people

20 *olis sitä rea[goin]tia samoin sen infran järjestäminen. (0.3) .hh mut sitte*

would be re[acting as well as organising the infrastructure. (0.3) .hh but then

21 (?): *[mm]*

22 S2: *pidemmällä tähtäimellä (.) niin nimenomaan se sellasten (.)*

in the longer run (.) the very creation of shared policies (.)

23 *keskustelukokouksissa tai (.) <muissa yhteyksissä> ne yhteisten linjojen*

in conversational meetings or (.) <other

24 *rakentamiset*

occasions>

25 S3: *niin mun mielestä [se on.]*

yes I think [that is.]

26 S2: *[et se et sit] (.) ja se (et) (.) mun mielest (.) se (.) ↑sekin on*

[it then] (.) and (that) (.) I think (.) that (.) ↑that is

27 *(0.4) vielä jotenki onnistuu mut se et miten me sitoudutaan niihin yhteisiin*

(0.4) still somehow possible to do but how do we commit ourselves to those

28 *linjauksiin niin se on mulle niinku <suuri kysymysmerkki>.*

shared policies appears just a <big question mark> to me.

On lines 1-2, S1 answers S2's question and proposes 'main points' as the focus of the group discussion. Importantly, these points are not expressed in the grid but refer to groups' earlier conversations and the notes they have taken (lines 1-2) and are further rephrased by S2 as the 'most pressing problems' of the organisation (line 3). In terms of the ongoing activity, this means that the group ceases using the grid as the basis of their conversation and does not specifically aim at accomplishing the task given but rather ops for a free discussion. The shift away from the grid thus amplifies the earlier, more implicit resistance towards the task and its knowing-how type of relevance.

Together S1 and S2 end up defining 'atmosphere of the elementary school' as the core problem to address (lines 5-7). They jointly construct this problem as a 'social fact', known by anybody with access to the history of the organisation. This can, firstly, be seen in S2's use of the pronoun *se* (line 6), which marks the issue as identifiable to the co-participants (see Laury 1997). On line 7, S1 agrees with S2's proposal, and by so doing, displays that she

accepts the existence of the problem as a fact. Thus, at this point the participants have identified a ‘fact’ that they have access to, on the level of knowing-that.

From then on, the participants work in a new kind of way, elaborating the phenomenon they have identified by constructing various kinds of causal relations that explain it (lines 8-22). In constructing these relations, the participants display their access to the matters under discussion in various ways. For example, the headmaster uses the expression *mä näen* ‘I see’ (line 8) that refers to observations he has made on site. Also, the participants refer to places (line 9), time frames (line 12) and groups of people (lines 11, 13-16). Explaining the phenomenon causally extends the talk from simply observing ‘facts’ towards understanding them, but this ‘sensemaking’ is done within the knowledge domain of education that is used to explain the behaviour of the staff and the participants do not make any connection to the coding scheme represented by the grid.

However, later on (lines 18-28) we can see the group moving towards a model for application that focuses more clearly on the classification of managerial actions. This shift is shown in the re-orientation towards the grid through pointing (line 18) and hand gesture (line 19) as well as referring to a concept of ‘reacting’ in the first column (line 20). The model resembles the categorisation presented in the grid, but it is now situated in the participants’ specific organisational realm. Firstly, S2 names two managerial actions, ‘conversations with these people’ and ‘organising the infrastructure’ (lines 18-20), which she explicitly classifies as ‘reactive’ actions. Secondly, she mentions ‘creation of shared policies’, which will be achieved in the context of ‘conversational meetings’ (lines 22-24) and can be seen as an example of ‘preventive actions’ although she does not explicitly use the term, but rather recontextualises these actions as longer term solutions. In the end, she refers to a third kind of managerial action, ‘committing ourselves to those shared policies’, which she frames as the most difficult one, thus echoing the earlier discussion with the consultant, without, however, linking it explicitly to the grid (lines 27-28).

To conclude, we have seen how the group members move towards applying the managerial knowledge to their organisation and thus construct knowing-how type expertise that aims towards managerial solutions to observed organisational problems. In looking at the way they manage to do this, we can see how the notions of access, knowledge domain, and knowing-that vs. knowing-how are all relevant in the process. Firstly, a phenomenon, the

organisational ‘what’ is identified. This can only be done if the group members have access to the practices and processes of the organisation. Then there is ‘sensemaking’ with regard to the observed problem, during which explanations are constructed to the phenomenon with the help of knowledge from the educational domain. Access to the organisational processes is vital in this stage as well. This already means a move towards knowing-how, but does not yet constitute managerial expertise. However, when the participants’ ‘sensemaking’ is connected to the managerial knowledge offered by the consultant and materialised in the coding scheme of the grid, the participants find a way to explicate future managerial practices that are oriented to practical organisational problems. By so doing, they can be seen to display managerial expertise, that is, show a skill of coding their own managerial actions through a specific coding scheme and thus applying theoretical managerial knowledge to the everyday reality of the particular organisation.

5 Conclusion

In this article, we have analysed the interactional construction of managerial expertise in a specific context: management training provided by a consulting company. In the training, the steering groups of an organisation were given a task of reflecting on their managerial actions related to well-being at work and categorising them by using a specific coding scheme. We thus defined managerial expertise the skill of applying theoretical managerial knowledge to the everyday reality of the particular organisation the steering groups are in charge of. From this viewpoint, the training context of our data is illustrative in that it makes the mutual negotiation of knowledge between the group members observable. In addition, the group’s knowledge can be juxtaposed with the knowledge of the consultant. We approached the case at hand with the help of a conversation analytic method and investigated how the participants displayed their orientation to different kinds of knowledge and negotiated the mutual relations between knowledge systems as part of their effort of constructing managerial expertise in and through situated training practices.

In previous conversation analytical research, expertise has often been approached through the notion of professional domains of knowledge (e.g. Heritage 2012; Nissi and Lehtinen 2016). Also, ‘expert knowledge’ has been distinguished from experience-based ‘lay knowledge’ (Heritage 2013). However, we have argued for a more multi-dimensional approach to the relationship between knowledge and expertise. In our analysis, we showed

that the use of the coding scheme the training assignment is based on is contingent on connecting general managerial knowledge to specific and local knowledge of the particular organisation, displaying access to organisational processes and activities and moving from knowing-that to knowing-how type of knowledge.

As for the domains of knowledge, they are often realised as coding schemes that may be materialised in tables, grids and standardised forms. In the training, such a scheme – materialised in the form of a fillable grid – represents the classification of organisational phenomena from the viewpoint of managerial knowledge and is construed as a learning object for the trainees. In setting the task, the consultant positions himself as the epistemic authority with regards to the managerial knowledge of the scheme by framing the task as potentially challenging for the trainees and by offering help. The trainees also orient to the consultant's specific knowledge regarding the scheme by asking for help after displaying difficulties in understanding the descriptions used in the grid. Utilising such a scheme, however, is not just a mechanical task of marking down certain organisational phenomena but rather a complex activity of learning to perceive those phenomena in everyday organisational life with the help of the scheme. Therefore, it is not only managerial knowledge that is utilised by the trainees in accomplishing the assignment. They also use knowledge in their specific professional domain, namely, educational domain where the consultant, for his part, does not display any expertise either in the initial request or in providing help.

A related issue is that of access. The managerial expertise the steering groups are expected to learn is contingent on having access to the daily life of a particular organisation. It is because of that access that the trainees can recognise the 'social facts' of their organisation and elaborate on the 'social facts' to various degrees. However, their access to organisational issues also varies and is not directly related, for example, to their organisational position. As the group work unfolds through the interactional structures of proposals, questions, and responses to these actions, the group members display their access to organisational phenomena and thus negotiate their mutual knowledge with regard to the task given. The consultant, on the other hand, does not claim any access to the life of the organisation: he gives generalised examples of practical managerial expertise but does not provide direct advice.

Finally, managerial expertise requires applied knowledge, proceeding from knowing-that to knowing-how. In our case, the managerial knowing-thats were materialised in the grid. However, as mentioned, the whole aim of the training has to do with applying this knowledge: the trainees need to learn to categorise phenomena in their organisation by finding connections between the descriptions of the grid and their organisational reality. While this aim is already present in the initial request turn of the consultant, it is also the dimension of knowledge that is visibly resisted by the trainees. This brings into the spotlight the core challenge of the training: the trainees need to do this application and find the relevance of the coding scheme in their own right. As we saw in our example, their own area of expertise can act as a mediating link in resolving this challenge. That is, the trainees can use methods for categorising phenomena derived from their own area of expertise, in this case the educational domain, in order to apply the knowing-thats of the grid for the purposes of their own organisation.

As discussed in the introduction, in current organisational cultures, managing organisation is often expected to be based on ‘reflexive practice’ so that the managers’ expertise largely consists of analysing organisational phenomena in a systemic way and making decisions accordingly (e.g. Cunliffe 2016). In this article, we have looked at the construction of such managerial expertise in action and analysed how the training participants display their orientation to different types of knowledge in trying to learn this special kind of organisational perception but also resist the task and their role as ‘trainees’. On the broader level, the training thus also demonstrates the mutual relations and boundaries between different professions with their expert areas. As mentioned earlier, consulting as a profession has often faced problems of legitimacy (Von Platen 2018), particularly in contemporary organisations where the consulting practice emphasises the client's own agency and problem solving (Nissi & Hirsto 2021). Our analysis has shed light on the roots of these problems, namely, that the expertise of the consultant is not freestanding but necessarily overlaps with the expertise of other professionals and is actually dependent on it. In this way, its relevance has to also be negotiated in situated ways in each professional encounter.

Funding information

This study was funded by the Finnish Cultural Foundation.

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Appendix. Transcription conventions.

.	Falling intonation
,	Level intonation
?	Rising intonation
↑	Rise in pitch
w<u>o</u>rd	Emphasis
>word<	Faster pace than the surrounding talk
<word>	Slower pace than the surrounding talk
@word@	Changed voice quality
wo:rd	Lengthening of sound
wo-	Word cut off
wo(h)rd	Outbreath within a word as in laughter
.hh	Inbreath
(0.5)	Pause in seconds
(.)	Micro pause (less than 0.2 seconds)
=	No pause between two adjacent utterances
[word]	Overlapping talk
*	Beginning of embodied action
WRITES	Embodied action

S1:	speaker
(word)	Item in doubt
((lines omitted))	Transcriber’s remarks

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