Playing Offense vs. Defense: The Effects of Team Strategic Orientation on Team Process in Competitive Environments

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Organizations increasingly rely on teams to formulate plans and respond in critical situations. However, current models of team process are insensitive to the effects of team strategic orientation. This paper expands existing work on team process and strategic orientation to introduce and explicate the constructs of offensive and defensive strategic orientations in teams. It takes advantage of a rare opportunity to observe eight counterterrorism teams in the intelligence community that explicitly adopted an offensive or defensive strategic orientation in evaluating terrorist threats. The resulting inductive model suggests that the strength of a team’s strategic orientation was enhanced or inhibited by its perception of oppositional strength and the problem scope it assumed in confronting the adversary. This in turn had effects on the work strategy the teams adopted, the extent to which they relied on internal versus external knowledge, and the norms for effort that evolved within the teams. The observations suggest broader theoretical implications for research on teams, as the “offense” and “defense” strategic orientations influence fundamental team processes related to effort, performance strategy, and use of member knowledge and skill.

Key words: team strategic orientation; outcome focus; process focus; collective information processing; team process

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Many organizations face increased competition as a result of economic globalization and the influence of technology on the rate of change in many industries. Organizational response in such situations is frequently formulated and carried out by groups (Hambrick and Mason 1984, Nadkarni and Barr 2008, Lyles and Schwenk 1992). In addition to being fast moving and dynamic (Eisenhardt 1989b, Faraj and Xiao 2006), competitive situations involve active opponents (Porter 1991), making information about the plans and intentions of others, as well as accurate knowledge of one’s own capabilities, highly relevant. However, existing research on the effects of competitive contexts on team information processing is somewhat conflicting. Research on threat rigidity suggests that threats in a competitive environment constrain information processing (Griffin et al. 1995, Staw et al. 1981). Other research points out that in some circumstances, teams can fail to gather enough external information, instead basing decisions on less information than they should (Ancona and Caldwell 1992, Eisenhardt 1989b, Janis 1982, Tasa and Whyte 2005). In contrast, other research suggests that competition and the stress it creates lead to greater openness to external information (Driskell and Salas 1991, Menon and Pfeffer 2003). Some research even finds that teams can gather too much external information (Haas and Hansen 2005, Wong 2004) while failing to make appropriate use of their own members’ knowledge (Stasser et al. 1995), also to the detriment of performance. Determining the conditions under which teams tend to gather too much or too little external information in competitive environments is critical to creating the conditions for effective performance.

Furthermore, much of a team’s ability to engage in the labor-intensive task of information gathering and analysis is driven by members’ overall level of motivation (De Dreu et al. 2008). Here again, the results of existing research on how competition might affect team motivation are also somewhat conflicting. Classic work on the effects of intergroup competition suggests motivational benefits (e.g., Deutsch 1949, Sherif et al. 1961). However, work on self-regulatory focus suggests that individuals trying to prevent negative events from occurring can experience low motivation accompanied by negative affect (Forster et al. 2001). Given the importance of motivation and information processing to effective team functioning in competitive environments, the circumstances under which each of these effects is likely to occur is important to understand.

One potentially important explanatory variable to consider in understanding the effects of competition on group functioning is team strategic orientation. I conceptualize the construct of team strategic orientation as encompassing the strategic direction and perceptions a team develops when operating against an opponent. Team strategic orientation can be characterized as
offense, or focused on pursuing objectives whose attainment occurs at the expense of an opponent, or defense, or focused on preventing loss at the hands of an opponent. The framework developed here builds on existing work conducted at both the organizational and individual levels of analysis that suggests important consequences for team functioning. Thus, this study seeks to explore the question, How does team strategic orientation affect team process in competitive environments? Given the theoretical and empirical limits of prior work, I take an inductive, theory-building approach (Eisenhardt 1989a). This study capitalizes on a rare opportunity to observe eight interagency counterterrorism teams in the intelligence community. I take advantage of a natural experiment to compare how teams confronted with the same information about a threat evolve different processes as a function of the team’s strategic orientation.

Furthermore, my analysis reveals some new dimensions underlying a team’s strategic orientation, which allow us to characterize its strength as well as its direction. A key insight is that although a team’s strategic direction (i.e., offense versus defense) sets a baseline of assumptions that teams adopt in facing the environment, the strength of team strategic orientation is reinforced by teams’ assessments of (1) oppositional strength and (2) the scope of the problem they face. Drawing on behavioral evidence, I find that these three elements of strategic orientation—problem scope, oppositional strength, and strategic direction—impact the strategy teams use for their work, their emphasis on internal versus external knowledge in assessing their environment, and the nature of the norms for effort that evolve, respectively (Hackman 2002). Team process, in turn, reinforces team strategic orientation and also has important implications for team decision making and performance, impacting the breadth of information, creativity, and confidence that is communicated in team conclusions and action plans.

Theoretical Background
The goal of this work is to shed light on how team strategic orientation affects team process and products. Existing work on strategic orientation at the individual and organizational levels, as well as work on team process, provides important foundations on which to build.

Strategic Orientation
Existing work on strategic orientation and related concepts has evolved independently but somewhat in parallel at the organizational and individual levels of analysis. Miles and Snow (1978) characterized firms as “prospectors” or “defenders” based on their strategic orientation. Prospectors are more offensive, pursuing opportunities in their environment, whereas defenders are more focused on maintaining their market share. Furthermore, the strategic orientations that firms adopt have consequences for the internal activities they prioritize: prospectors emphasize innovation activities, and defenders emphasize efficiency (Rajagopalan and Finkelstein 1992, Rajagopalan 1997, Venkatraman 1989).

Work related to strategic orientation and self-regulatory focus at the individual level characterizes individual strategic direction as promotion or prevention, with associated effects for motivation and self-regulation (Elliot 1999, Higgins 1997, Keltner et al. 2003). Promotion goals are associated with the behavioral approach system, which regulates behavior related to sex, food, safety, achievement, and aggression; stimulates attention to reward contingencies in the environment; and evokes more positive emotion. In contrast, prevention goals are associated with the behavioral inhibition system, which is activated by threat and uncertainty and stimulates attention to punishment contingencies and evokes more negative emotion. Furthermore, in the face of negative feedback, individuals working on promotion tasks exhibit higher levels of motivation and perseverance than individuals working on prevention tasks (Spiegel et al. 2004).

Research has also examined the implications of self-regulatory focus for team behavior. Individual-level responses to promotion- versus prevention-focused task situations have been shown to create convergence in group emotion (Faddegon et al. 2008) and to direct members’ attention to gain- or loss-relevant information (Florack and Hartmann 2007), thus influencing preferences for conservative versus risky action in group decision making (Levine et al. 2000, Paese et al. 1993, Tindale et al. 1993). However, these studies were not conducted in the context of intergroup competition, a situation we know can enhance group motivation (Sherif et al. 1961, Simmel 1955, Stein 1976). In addition, existing work on self-regulatory focus does not fully explain why some teams are more open to information from the external environment while others rely more on information from members within the team, nor does it explain how strategic direction influences the strategy a team adopts to organize its collective diagnosis and action planning. Thus, examining the evolution of team process in the context of team strategic orientation, as well as factors that make a team’s orientation stronger or weaker, will provide some important insights on these issues.

Team Process
A complete view of team process incorporates the manner in which teams use the knowledge and skills of members, craft performance strategy, and manage member effort (Hackman 2002). Although a lot of research has been conducted on each of these three components independently, little has examined the coevolution in team performance or their sensitivity to competitive environmental dynamics. I briefly review what is known...
about each and highlight existing gaps that the current study aims to address.

*Use of Internal and External Information.* Collective information processing, either through the use of team members’ knowledge or by searching the environment for information, is critical to team performance in competitive environments. Much of the existing work on collective information processing in teams examines how members make use of information held by other members of the group. Group features that enable fellow group members to recognize and use the expertise of others include the familiarity of members with each other (Lewis 2004), the frequency of communication among members (Lewis et al. 2007), the status cues of expert members (Bunderson 2003), coordination processes that designate members as knowledge holders (Faraj and Sproull 2000, Faraj and Xiao 2006, Stewart and Stasser 1995), and the nature of the planning and group interaction process that allows members to observe evidence of what others know in order to identify the most knowledgeable members in a given situation (Henry 1995, Littlepage et al. 1997, Woolley et al. 2008).

With regard to using external information, some argue that teams have a tendency to neglect their environment (Ancona and Caldwell 1992) and that executives are more likely to scan the environment selectively and mostly when strategic uncertainty is high (Daft et al. 1988, May et al. 2000, Cyert and March 1963). Other research suggests that information gathering from the environment is not uniformly beneficial; teams that lack sufficient structural diversity are unlikely to bring in information that is novel or unique enough to offset the costs of the time spent gathering it (Cummings 2004, Reagans and McEvily 2003). Consequently, some studies suggest a trade-off between internal and external knowledge (Haas 2006, Wong 2004), pointing to situations in which teams become too preoccupied with external information gathering (Haas and Hansen 2005). However, we do not yet understand when and why a team will be more focused on internal than on external information. Given the critical nature of finding and using well all relevant information in competitive environments, understanding the drivers of this internal versus external trade-off can be critical to improving team performance.

*Team Strategy.* Team strategy, a second major element of team process (Hackman 2002), has direct implications for team information processing and performance. A team’s strategy is a framework for guiding member attention toward key priorities and activities to accomplish goals, as evidenced by a pattern in a stream of important decisions (Erickson and Dyer 2004, Hackman 1987, Hambrick 1981, Miles and Snow 1978, Mintzberg 1978). *Team strategic orientation* describes the team’s general goals vis-à-vis others in its environment; a team’s strategy describes the means whereby the team organizes activities and intentions internally. Although existing work demonstrates that the strategic orientation an organization adopts in a competitive environment influences the priorities it sets among its internal activities (Rajagopalan and Finkelstein 1992), we do not know how *team strategic orientation* affects or is affected by team performance strategy.

Team strategy has important implications for information collection and use. Work on outcome- and process-focused strategies in teams (Woolley 2009a) has demonstrated the implications for how teams use information. Outcome-focused teams allow desired outcomes and objectives to take precedence over the processes for conducting work, setting goal priorities, and attending more selectively to information that is relevant to their selected goals. Process-focused teams allow work processes to take precedence over and determine work products, following the selected process faithfully and systematically, leading members to cover more (and sometimes irrelevant) ground (Woolley 2009a, b). Thus, a team’s strategy strongly influences how much information members will collect, which has important implications for performance in competitive environments where judicious collection of information is critical (Gilad 1991).

*Team Effort and Motivation.* Teams in any setting can struggle with managing the effort of members, as a long history of work on social loafing and free riding readily attests (i.e., Latané et al. 1979, Karau and Williams 1993). Research on the effects of competition in teams has generally demonstrated a positive effect of intergroup competition on team levels of motivation and effort (Deutsch 1949, May and Doob 1937, Sherif et al. 1961). However, as discussed above, work on self-regulatory focus has demonstrated that although the motivational benefits hold true for promotion-focused goals, prevention-focused defensive goals can result in reduced perseverance and negative emotion in groups (Faddegon et al. 2009, 2008; Florack and Hartmann 2007). Because these latter findings have not been examined with respect to competitive situations, it may be the case that the positive dynamics associated with intergroup competition (i.e., group cohesion, self-serving biases) overcome the otherwise negative effects of prevention-focused defensive goals. Given how demanding long-term competitive situations can be, a better understanding of the conditions under which motivational decrements are likely to occur is critical.

**Focus of Current Study**

The purpose of this study is to develop a model of how team strategic orientation affects team process. A rare opportunity was made available to examine the dynamics of team strategic orientation in a situation in which
they exist naturally—the U.S. Intelligence community (IC). Intelligence analysts spend much of their careers predicting actions that other people or groups may take and/or reasoning about the proper offensive or defensive actions of the U.S. government. Like business organizations, the strategic analysis of teams in the IC occurs under tremendous time pressure, sometimes with ambiguity about who exactly the opponent is or how much to trust the information they have. In addition to traditional analytic methods, the military and intelligence communities have adopted an approach called “red teaming,” where teams intentionally adopt an offensive posture to understand the adversary’s perspective on a situation.

I had the opportunity to observe interagency crisis action teams as they were explicitly asked to adopt an offensive or defensive team strategic orientation in examining an active terrorist threat. Such an explicit adoption of strategic orientation greatly enhances the ability to develop theory; in many business environments, the adoption of an offensive or defensive perspective likely occurs much more implicitly and possibly with less consistency, making analysis by an observer less tenable. In the current setting, despite membership drawn from the same population of government and military personnel and providing the same background information about a known threat, dramatically different processes evolved in teams playing offense versus those playing defense. These teams were not convened for the purpose of this research, yet the structure of their approach provided the perfect data to examine the guiding research question: How does team strategic orientation shape team process?

I begin with observations of these interagency crisis action teams and then relate these observations to concepts from the existing literature to build a process model of team strategic orientation. The resulting framework suggests a number of directions for future research.

Method

Research Site

Eight interagency crisis action teams, four “Red” (offensive) and four “Blue” (defensive, to symbolize their government and law enforcement ties), operated for one week each to analyze one of four current terrorist threats. The four threats are referred to as Maritime/Chemical, Biological, Improvised explosive device (IED), and Air/Sea. Each threat was worked on by one Red and one Blue team. Each team had five to eight experienced defense and intelligence analysts from a variety of agencies, and each team could make use of a research support cell convened specifically to support its work. All teams got current information on the threat, including extensive background information on the suspects involved.

Although the teams were not convened for the purposes of this research, the setting provided a natural experiment, because each of the four threats was examined simultaneously by two teams, one adopting an offensive and the other a defensive perspective. This approach was used to develop a broader perspective on each situation. The objective of all teams was to provide an estimate of the likely plans and intentions of the terrorist group being investigated. Red teams were instructed to do this while adopting the perspective of the adversary and plotting against the United States, using the threat information provided; Blue teams examined the same threat information from the U.S. perspective to discern what the group under question might do and what preventative measures should be taken. At the end of the week, teams provided briefings on their estimates of the terrorists’ intentions to one another as well as to the sponsoring intelligence agency representatives. Implicitly, teams competed not only against real-world adversaries but also against each other, as Red teams tried to plan an attack that Blue teams would not anticipate, whereas Blue teams tried to anticipate Reds’ most likely courses of action. In some cases, teams correctly predicted activities of terrorist groups that were observed or thwarted in the months that followed.

Traditional game-theoretic analyses of competitive situations suggest that players in the defensive position have an inherently greater probability of failure than offensive players, yet the use of information about the opponent and appropriate analytic techniques can alter those probabilities substantially (Armstrong 2002, Green 2002). In this situation, Blue (defense) was given in-depth information on a relatively defined group of people to consider, and Red was asked to plot something that would evade detection by all the defensive assets of the United States. Thus, the potential number of scenarios each side could consider was vast—but could also be circumscribed given their knowledge of the adversary. The degree to which the model proposed here will generalize to situations in which greater or lesser asymmetries of risk and reward exist is an important empirical question for future research.

Data Collection

All teams worked face-to-face in a secure facility. Because of the sensitivity of the information involved, members were not permitted to remove any written materials or to discuss the project outside the facility. The facility was open and available to teams nine hours per day. Each team was audio- and videotaped for the duration of their weeklong collaboration, yielding an average of 32 hours of video footage per team or 256 hours of video total. All teams were also observed by cleared social scientists on site, who were there to observe the teams for other purposes but whose notes and observations were available for this analysis. This
yielded 632 pages of observational notes. Six observers wrote a summary report of their impressions and findings, which were also factored into my analysis of team process. Teams’ final reports and video footage of the presentation of their conclusions were reviewed by two experienced government intelligence professionals, who evaluated them for the level of depth and breadth of coverage.

Data Analysis
I was present on site during the work of four of the teams, making my own observations, which were discussed and triangulated with those of other on site observers. The remaining four teams were observed by other social scientists whose notes were available to me. Initial observations (both my own and observers’) of the first few teams suggested fairly stark differences in the behavior of Red and Blue teams, prompting further in-depth analysis. I used a multiple-case approach that would allow me to identify constructs that distinguish both between and among offensive and defensive teams and test the relationships across different cases, yielding a more robust, generalizable, and testable theory (Eisenhardt and Graebner 2007).

Complete video recordings were available for all eight teams, and sanitized transcripts were also available for four of those teams. I initially conducted exploratory analyses using videos, transcripts, and observer notes for four teams (two Red, two Blue). I began formulating a tentative model through the method of grounded theory (Glaser and Strauss 1967). As Miles and Huberman (1994) suggest, my notes and interpretations were guided by my explicit prior assumptions, namely, that there would be distinctions in the processes adopted by offensive and defensive teams. After a period of open review and note taking, I rereviewed the videos of these four teams and created written summaries of each distinct work period (generally clustered as hours before and after lunch, or between noteworthy breaks), conducting within-case analysis as recommended by Eisenhardt (1989a). I noted elements of team process that were salient or that evidenced significant change or transition in each period. These were shared with other observers of the teams to obtain verification of evolving impressions.2 I then used the summaries to search for cross-case patterns (Eisenhardt 1989a) and to isolate a smaller number of major categories of similarities and differences across teams, following the explanation-building logic described by Yin (1994). These categories paralleled the conceptual categories of effort, performance strategy, and use of knowledge and skill—three processes identified by prior studies to be critical elements of team performance (see Hackman 2002). As the measures were developed and teams assessed on each, they were triangulated among observer notes, video transcripts, my own observations, and artifacts created by the team (documents, flip charts, member notes, etc.).

Strategy was described using the constructs of outcome and process focus developed by Woolley (2009a). Early team conversations and interactions were evaluated for how early objectives and priorities were discussed and decided on (as indicators of outcome focus) versus discussion of analytic frameworks and processes for guiding the collection of information (as indicators of process focus). The timing of discussion about and degree of emphasis on desired outcomes or work processes determined the level of outcome or process focus evident in each team’s strategy, respectively. Use of knowledge and skill was captured through a combination of observations of the extensiveness of members’ initial self-introductions to the team and the amount of inquiry or deference among members regarding areas of expertise, plus measurement of the team’s reliance on the support cell to provide external expertise (based on the number of requests for information, or RFIs, the teams issued). Effort was captured by observer notes regarding how quickly teams got to work each day, how many breaks they took, quotes from video recordings and transcripts suggesting that members were carrying on work outside of stated work hours, and evidence that members were withdrawing and allowing others to carry the load.

After completing the exploratory analyses on the initial four teams, I used the categories and the associated behaviors to review and document the work of the remaining four teams, during which no additional categories of discrimination between offensive and defensive teams were evident. Summaries of the observations of these teams were then shared with other observers for corroboration.

Initially, the main focus was on identifying factors differentiating Red and Blue teams. However, a third review of the data for all eight teams revealed variance among teams playing the same role (e.g., offense or defense), adding further dimensionality to the notion of team strategic orientation. These differences related to perceptions teams had about the strength of their opponent, as well as how comprehensive they felt they needed to be in assessing the situation (i.e., “problem scope”). These perceptions surfaced relatively early in the teams’ work, though some work sessions were punctuated by debate regarding one or both of these issues. Notes, transcripts, and video recordings were reviewed for a third time for all teams to capture evidence of their perceptions of oppositional strength and problem scope, largely revealed through team member comments. Teams were characterized with respect to their standing on these issues, and the overall strength of their offensive or defensive strategic orientation was examined in relation to the other aspects of group process to identify any overall patterns.

Finally, as a secondary analysis, teams’ final products (which included a brief report and presentation), plus their spontaneous verbal reports about their work,
were considered in drawing conclusions about the effects of offensive and defensive strategic orientation on teams’ work products and experiences. Given the impossibility of nailing down analytic team performance definitively—indeed, a frequent quip of career analysts is that “when we do our job well, nothing happens”—assessments of work products by veteran analysts, as described above, provide some clues to the potential strengths and weaknesses of offensive and defensive strategic orientation.

A Process Model of Strategic Orientation

The process model of strategic orientation developed here focuses on how the elements of strategic orientation affect the processes that evolve within the team. These processes, in turn, have implications for the products of team work. In summary, offensive teams’ perceptions of a narrower problem scope and lesser oppositional strength lead members to adopt a selective outcome focus. Consequently, offensive teams make better use of the readily accessible internal knowledge of fellow team members, reinforcing cycles of positive affect and high effort. In contrast, defensive teams perceive a broader problem scope and greater oppositional strength, leading members to adopt a broader process focus. Consequently, defensive teams emphasize the use of a large volume of information collected from outside the team, increasing members’ sense of being overwhelmed and reducing member effort.

Figure 1 portrays the relationship among the elements of strategic orientation and team process and the resulting characteristics of team work products. Below, I walk through each element of the model and discuss the evidence associated with each.

Strength of Strategic Orientation: Oppositional Strength and Problem Scope

Although teams’ strategic direction was assigned (i.e., offense versus defense), comparisons among the offensive and defensive teams suggested that the strength of their orientation was shaped by two types of perceptions of the competitive environment: oppositional strength and problem scope. Perceptions of greater oppositional strength and broader problem scope strengthened defensive strategic orientation and reduced perceptions of both strengthened offensive strategic orientation.

Oppositional strength refers to both the degree and the range of activity the opponent is judged to be capable of initiating or mustering in response to events. Perceptions of oppositional strength were measured using quotes from transcripts and observer notes portraying assumptions that teams made about their adversaries. Oppositional strength is relevant to teams in both offensive and defensive positions, as the nature of the moves being planned would logically differ as a function of the opponent’s perceived capabilities relative to one’s own (McRaven 1996, Porter 1991).

A second aspect of strategic orientation that had an impact on team process is the problem scope teams assumed—that is, the extent to which team members believed they needed to be comprehensive versus narrow in their approaches to information collection and action planning in the situations they were analyzing. A comprehensive offense entails assaulting the opponent on multiple fronts, whereas a comprehensive defense entails being ready to counter an attack on multiple fronts. Teams’ beliefs about problem scope were captured in the data from transcripts and observer notes of relevant statements made by team members about their assumptions, as well as in observations of the number of potential courses of action teams considered (as evidenced in their working notes and final report documents).

The perception of oppositional strength and problem scope had direct implications for team process, differentiating both between and among offensive and defensive teams. The problem scope that teams assumed influenced the extent to which their performance strategy was more outcome or process focused. A narrower scope led to a more selective search for possibilities and an outcome focus; once a team found a solution that met its narrowly defined objectives, it could use that to guide the
remaining planning activities. In contrast, a comprehensive scope demanded a team strategy that would guide an exhaustive and systematic search of available information: generally, these teams gravitated toward established or improvised analytic frameworks to guide this search, leading to a process focus.

Perceptions of oppositional strength influenced the kinds of information teams searched for: an opponent perceived as weaker allowed teams to rely more on the knowledge and skills of members of their own team, whereas a stronger opponent demanded collection of more external information. Both problem scope and oppositional strength together exacerbated the effects of strategic direction (i.e., offense versus defense), which activates the approach versus inhibition tendencies the existing literature predicted (Elliot 1999, Elliot and Harackiewicz 1996, Keltner et al. 2003).

It became evident over the observation period that whether a team was assigned an offensive or defensive strategic direction resulted in a different baseline for the team’s perceptions, which was enhanced to a greater or lesser degree in the course of the team’s work. Highly offensive teams perceived greater oppositional strength and became more frustrated and withdrawn as they collected more and more information from their environment in their attempts to be comprehensive. In contrast, highly offensive teams became more energized and confident against an opponent they perceived as weaker, as their more selective approach allowed them to focus on a limited set of objectives drawn from their personal bases of expertise. Evidence associated with both strength of strategic orientation and associated team processes is summarized in Tables 1 and 2.

Defensive Team Process: “Looking Everywhere and Looking Nowhere.” The Blue Maritime/Chemical threat team provided one of the more extreme examples of defensive team strategic orientation. Transcripts documenting team members’ comments in their first hours of work conveyed the sense that they felt they were facing a strong opponent: “These people have a completely different mindset…they know stuff we don’t know and we can’t even relate to what they are thinking.” These impressions were triangulated by observer notes, including the comment, “The team is intimidated and doesn’t know where to begin.” Subsequently, the team set to work with the implicit assumption that they needed to identify all possibilities and nail down the finite details of what the terrorists might be planning so that they could apprehend them and thwart their plans—a comprehensive problem scope: “We need to get our arms around this thing if we have a prayer of getting these guys.” In the first morning of its work, the team developed a guiding set of categories of information it wanted to collect and from that point forward became highly process focused. Members divided the categories among themselves and used the framework as a touchstone through the rest of the week, beginning sessions by checking off parts of the framework that seemed complete. Filling in the framework meant collecting an enormous amount of information, generally from outside of the team. Records of the support cell indicate that the team issued 166 RFIs during its work together. This approach quickly grew tiresome; by the end of the second day, the observer notes, “The team seems a bit burnt out.” On Day 3, some members began to add more and more categories of information for the team to collect, to the frustration of others.

Videotapes of the team’s work space revealed flip charts taped to the wall all over the room, with lists and matrices to keep track of analyses. The number of flip charts increased steadily over the course of the week as categories were added, but the team did not rule anything out as time went on. It appeared that in the course of collecting this external information, team members overlooked some key internal resources and expertise. In particular, in the final hours of their work, as they finished up their briefing materials, observers noted that the team learned that one of its members had a graduate degree in physics, an area that was fairly central to the threat they were examining. On the first morning of their first day together, this member had been set to work mining a database of information on communication patterns and had remained focused on that aspect of work throughout the week. However, prior to this discovery, another member lamented the lack of technical skill on the team: “We do not have enough expertise on our team. In the end, they are going to tell us we got it all wrong.”

The Blue Biological threat team also exhibited a moderate to high level of defensive strategic orientation, with similar patterns in team process. Comments made by members early in their work revealed perceptions of a comprehensive problem scope: “We need to solve this thing and roll these guys up.” Their strategy from the first hours of work was characterized by a high level of process focus, in that they identified all the categories of information they would need to collect to identify all possibilities and attempt to “solve” the plot. The first two hours of their work together was spent outlining the framework that would guide their data collection. As their work ensued, the team remained highly process focused, working systematically through each of the categories: “OK, we’ve exhausted our leads relating to [redacted], now we should really focus on [redacted].”

Members of the Blue Biological threat team also made comments throughout their work indicating that they perceived that they were working against a very strong opponent: “These guys could do this stuff anywhere, any time…and if they did, it would be chaos.” The team collected an enormous amount of information from outside the team about what the adversary might know or be doing. Team records include an extensive spreadsheet
Table 1 Analysis of Strength of Strategic Orientation

<table>
<thead>
<tr>
<th>Team/threat</th>
<th>No. of agencies rep.</th>
<th>Oppositional strength</th>
<th>Strategic orientation</th>
<th>Problem scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense (Blue)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maritime/Chemical (strong)</td>
<td>7 5</td>
<td>High: “These people have a completely different mindset... they know stuff we don’t know and we can’t even relate to what they are thinking.”</td>
<td>Comprehensive: “We need to get our arms around this thing.” Many group arguments throughout address where to focus, how much detail to go into.</td>
<td></td>
</tr>
<tr>
<td>Biological (strong)</td>
<td>9 4</td>
<td>High: “These guys could do this stuff anywhere, any time... and if they did, it would be chaos.” “These guys have a lot of expertise we don’t have...”</td>
<td>Comprehensive: “We need to solve this thing and roll these guys up.” Several members of teams look for very specific details of a possible plan that could lead to arrest.</td>
<td></td>
</tr>
<tr>
<td>IED (moderate)</td>
<td>6 5</td>
<td>Moderate: “They are good, but I don’t think they will do anything too extreme; they might hurt their own people.”</td>
<td>Moderate: “We can’t pinpoint everything; we need to identify the key indicators.”</td>
<td></td>
</tr>
<tr>
<td>Air/Sea (moderate)</td>
<td>7 6</td>
<td>Moderate: “I don’t think they really understand [that area] as well as they think they do.”</td>
<td>Moderate: “We need to identify the highest probability scenarios and limit their area of access.”</td>
<td></td>
</tr>
<tr>
<td>Offense (Red)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biological (strong)</td>
<td>7 6</td>
<td>Low: “It would be shockingly easy to overwhelm the [redacted] system.”</td>
<td>Narrow: “There is a lot of low-hanging fruit here; we just need to set off one or two of these triggers and we are off to the races.”</td>
<td></td>
</tr>
<tr>
<td>IED (strong)</td>
<td>5 5</td>
<td>Low: “It is quite easy to create an unsettling sense, and that is exactly what we want.”</td>
<td>Narrow: “We need to look for the simplest means necessary to carry out the selected objective; we want to keep it as simple as possible.”</td>
<td></td>
</tr>
<tr>
<td>Air/Sea (moderate)</td>
<td>5 5</td>
<td>Mod/high: “If we are going to hit them, we better hit them hard and hit them often.”</td>
<td>Moderate: Tension in the group; some members argue to “keep it simple,” whereas others criticize the group for “thinking small time,” arguing that they needed to make a big impact.</td>
<td></td>
</tr>
<tr>
<td>Maritime/Chemical (moderate)</td>
<td>7 6</td>
<td>Mod/high: “It’s going to take a lot of assets to accomplish these plans against [the adversary]. They are pretty well protected.”</td>
<td>Moderate: “I think we only have one shot at this, so we better make it count and take the whole place down.”</td>
<td></td>
</tr>
</tbody>
</table>

Note: Teams are arranged in order of assessed strength of orientation, from strong to moderate/weak.

maintained by one member who attempted to track all the information the team sought, which was more than 20 pages long. The team issued 151 RFIs in the span of three days, asking some questions that were likely already known by team members, given their functional backgrounds and experience with this type of threat, yet transcripts and observer notes indicate that little discussion of these issues occurred.

Observer notes further commented on the Blue Biological threat team’s focus on collecting external information and members’ apparent lack of interest in discussion and integration: “The team seems focused on trying to find a golden nugget from somewhere else. [A] member who has extensive knowledge of [redacted] seems withdrawn. Nobody is asking for his input.” Over the course of the week the team got increasingly tired and frustrated, directing a lot of its frustration at what it perceived as a lack of good information coming to it in response to its requests. There were long periods of silence during work periods as members waited for more information to come from the outside, rather than discussing what was already known. Observers noted that three team members became increasingly withdrawn over the course of the team’s work, a fact corroborated by the lack of any commentary by these members in the videotape of the team. In the end, the team tried to cover its lack of insight by writing its report using sufficiently broad language that could be spun in multiple ways. One member commented during the final work session, “It feels like we have been looking everywhere and looking nowhere.”

Offensive Team Process: “Keep It Simple.” In stark contrast to most of the Blue teams, the Red Biological
Table 2  Evidence of Team Process Related to Strength of Strategic Orientation

<table>
<thead>
<tr>
<th>Team/process</th>
<th>Team strategy</th>
<th>Internal knowledge emphasis</th>
<th>Ext. info use (RFIs)</th>
<th>Norms for effort/ perseverance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense (Blue)</td>
<td>High process focus: First morning together spent discussing process; framework identified to guide information gathering. Meetings begin by revisiting the framework, which becomes the centerpiece of their report.</td>
<td>High external emphasis: One member comments, “We do not have enough expertise on our team. In the end, they’re going to tell us we got it all wrong.” Team overlooks member who has physics degree until their second-to-last meeting.</td>
<td>166</td>
<td>Low effort: Members take many breaks throughout work; members leave the room with no explanation. The observer notes, “The team seems a bit burnt out” at the end of the second day. Two members become withdrawn early in work; one drops out of the team.</td>
</tr>
<tr>
<td>Biological (strong)</td>
<td>High process focus: Team begins by brainstorming external intelligence to request; remainder of work characterized by generating lists of information to search for.</td>
<td>High external emphasis: Team repeatedly defers to one member with key expertise; otherwise, it does not identify others who have key knowledge and skills.</td>
<td>151</td>
<td>Low effort: Many instances of team waiting without active work taking place—for members to return from lunch, or for expert informants to arrive for an interview.</td>
</tr>
<tr>
<td>IED (strong)</td>
<td>Moderate process focus: Members adopt a framework to guide data collection and analysis within first two hours, trying to match it with analytic objectives. Framework becomes center of final report.</td>
<td>Mixed internal/external emphasis: Members share lots of real-life war stories; identify one or two members with relevant background to interface and get information from experts.</td>
<td>77</td>
<td>Moderate effort: Team has bursts of energy punctuated by lulls and long breaks. Several instances of waiting for information to arrive; two members are very quiet/low contributors throughout.</td>
</tr>
<tr>
<td>Air/Sea (moderate)</td>
<td>Mixed outcome/process focus: Team reaches out to try to clarify its objectives with key stakeholders. Adopts different frameworks at different points in the work, advocated by members with different agency backgrounds.</td>
<td>Mixed internal/external emphasis: Members frequently share real-life “war stories” and defer questions to each other based on expertise: “Let me ask you, since you have so much knowledge of [redacted].”</td>
<td>84</td>
<td>Moderate/high effort: Team works hard during all sessions, and all members are engaged. Toward the end of several sessions, however, the observer notes indicate “the team seems tired and a bit overwhelmed.”</td>
</tr>
<tr>
<td>Offense (Red)</td>
<td>High outcome focus: Within first 45 minutes member says, “I have a few quick ideas for an attack if anyone wants to hear them.” The group resists a member’s attempt to formalize process and focuses on symbolism as a key priority in the design of its attack.</td>
<td>High internal emphasis: One member explicitly states, “Devising a plan built on what we know is the way to go, since there are any one of a large number of ways we can accomplish these objectives.”</td>
<td>0</td>
<td>High effort: At the beginning of each work session it is evident that members had been working on and thinking about ideas between sessions, frequently coming in and presenting the work they had done to the rest of the group. Sessions run long with few breaks.</td>
</tr>
<tr>
<td>Biological (strong)</td>
<td>High outcome focus: Determines key objectives within the first hour. A member attempts to get the group to establish a formal process, but the others resist: “We shouldn’t break into roles and chop this into parts; we need to keep the communication open.”</td>
<td>High internal emphasis: During initial introduction, one member comments on complementarities in members’ skills and identifying gaps. When a new member enters, he interviews him to see how he fills the gap in expertise. Throughout work, members frequently defer to other members’ expertise.</td>
<td>3</td>
<td>High effort: Team needs repeated reminders to break for lunch or to leave the facility at the end of the day. Some members appear to work through lunches and breaks.</td>
</tr>
<tr>
<td>IED (strong)</td>
<td>High outcome focus: Some members try to interject to get team to discuss process but are ignored. Members quickly agree on priorities: “attacks on military, impact on economy, and a high body count— in that order.”</td>
<td>High internal emphasis: Once a basic plan is in place, the group repeatedly breaks into subgroups to work the details based on areas of expertise. Members make a point of highlighting and deferring to expertise of other members.</td>
<td>4</td>
<td>Moderate to high effort: One member seems to be less engaged, but the group takes few breaks and works consistently in each work session.</td>
</tr>
<tr>
<td>Maritime/Chemical (moderate)</td>
<td>Moderate outcome focus: Takes a more systematic approach to determine its intended target; spends time creating a matrix of possibilities before selecting and refining the details of its plan.</td>
<td>High internal emphasis: Collects more external info at the beginning; gradually reveals member capabilities as plan evolves; members add elements based on special skills and abilities, shifting the focus to inside the group.</td>
<td>9</td>
<td>Moderate effort: A bit of internal debate over objectives; one member becomes quiet and withdrawn. The rest of the members remain highly engaged.</td>
</tr>
</tbody>
</table>

Note: Teams are arranged in order of assessed strength of orientation, from strong to moderate/weak.
The team also took a very different approach to its work. In contrast to the Maritime/Chemical threat team, the Red Biological threat team began to brainstorm ideas for a possible attack, and observers noted that team members had established their overarching objectives by lunchtime on the first day. The team was highly outcome-focused in its work, exploring different potential operational plans and rejecting those that did not easily accomplish their objectives. On the second day, one member began to leave the room to gather more detailed information about a particular mode of transportation, and another member asked, “Do you think you really need to do that? It’s not that central to what we are trying to do.” The first member concurred and they decided to fill in the details with their own knowledge and assumptions. Later that day, a third member reiterated the belief that “devising a plan built on what we know is the way to go, since there are a large number of ways we can accomplish these objectives.” The team was highly energetic in its work, and at the beginning of each session members commented on work they had been carrying out independently between sessions, after the facility closed at night.

The Red IED threat team exhibited many of the same qualities as the Red Biological threat team. Members frequently repeated the mantra “Keep it simple,” reiterating the belief that there were a large number of ways in which they could meet their desired objectives and any one of them would work, conveying a sense of a relatively narrow problem scope. The team also exhibited a highly outcome-focused approach to its work, selecting its key objectives within the first hour and a half, which allowed members to narrow the range of alternatives and information they needed to consider. These objectives became the guiding framework for the rest of their work, as each possibility that arose was tested against its fit with the objectives. Members also saw the opponent as relatively weak, as conveyed through comments such as “It is quite easy to create an unsettling sense, and that is exactly what we want.” The team brainstormed and listed all the ways to make a population feel “unsettled,” reinforcing its sense that this would be a fairly easy task. The team then focused on matching team members’ knowledge and expertise to the plan. One member explicitly observed and commented on the complementarities among members’ expertise, fitting together a plan based on what members already knew and reducing the need for the team to reach out to the external research cell for information. As the team went deeper into the details of its plan, members continued to acknowledge the expertise of other members: “We should really leave target selection up to him, since he is an expert in threat [redacted].”

Variance in Strength of Strategic Orientation

Similar patterns were evident to some degree in all offensive and defensive teams, although there was variance observed in the apparent strength of strategic orientation. Comparisons among the group of offensive and defensive teams suggest that the strength of their orientation is influenced by their perceptions of oppositional strength and problem scope.

For example, as discussed above, the Red Biological threat team exemplified a perception of low oppositional strength and a narrow problem scope, commenting on the amount of “low-hanging fruit” that existed and on how “shockingly easy” it would be to accomplish its objectives. In contrast, a more moderate level of offensive strategic orientation was exemplified by the Red Maritime/Chemical threat team. This team exhibited a high level of awareness of the defenses it was up against in attempting to carry out plans. One member commented, “It’s going to take a lot of assets to accomplish these plans against [the adversary]. They are pretty well protected,” suggesting that team members estimated oppositional strength to be quite high. Given the target it selected, the team also developed the view that if it did not completely succeed on its first attempt, the mission would be a failure, assuming a comprehensive problem scope: “I think we only have one shot at this, so we better make it count and take the whole place down. As soon as we expose those assets, we’re done.” The team also took a very different approach to its work...
than the Red Biological threat team. Unlike other Red teams, this team developed a matrix of potential targets and spent the first day and a half of its work systematically evaluating those targets before selecting one and moving forward.

The Blue teams likewise exhibited variance in the strength of defensive strategic orientation. As previously discussed, a high level of defensive strategic orientation was observed in the Blue Maritime/Chemical threat team. This team conveyed a sense of being outwitted by the adversary from the start (i.e., “We can’t even relate to what they are thinking”) and the need to be comprehensive in evaluating all possible threats the opponent posed. In contrast, a more moderate level of defensive strategic orientation was evident in the Blue Air/Sea threat team. After beginning to review the backgrounds of the members of the terrorist group and make an assessment of its likely plans, one member declared, “I don’t think they really understand [that area] as well as they think they do,” suggesting a more moderate view of oppositional strength. Other members agreed. As the group began to refine its own understanding of its objectives, one member suggested a narrower problem scope: “We can’t nail down exactly what they are going to do. We need to identify the highest probability scenarios and limit their area of access.” The group agreed, although members raised the question again later on in their work, “Aren’t we limiting our scope too much?” to which another member responded, “Yes, but trying to do everything is doing nothing.”

Although oppositional strength and problem scope appeared to go hand in hand in most of these teams, this was not always the case. For example, the Blue IED threat team explicitly decided to deal with a strong opponent by targeting areas in which focused success could be achieved. One member told the others, “We can’t look everywhere; we need to pinpoint key indicators and then figure out how to limit their operations,” conveying a sense of a narrower scope. Team members viewed their work as focused on identifying as many key indicators as they could and limiting the threat, rather than preventing all possible threats.

**Team Products and Trade-offs**

As discussed previously, team strategic orientation was associated with markedly different sets of perceptions and processes unfolding within the teams. In addition, team members’ own sense of their work and their final products took on a very different character. The result was a narrowly scoped but relatively deep set of recommendations from the Red/offense teams and a broadly scoped but more vaguely developed set of recommendations from the Blue/defense teams. Neither was a slam dunk in the opinion of the expert evaluators, but the two offered potential synergies for developing a more balanced view of the competitive environment.

**Offensive Team Experiences: “They Are Not Going to Know What Hit Them!”** As the teams went about their work, their differences were associated with differences in overall confidence in their conclusions. The quote above was from a member of the Red IED threat team and is representative of statements made by members of all of the Red teams near the conclusion of their work. The focus that these teams enjoyed in determining their targets early and narrowing the range of information they sought afforded them the luxury of collecting confirming information and becoming more confident about the brilliance of their plans. However, at the time the Red teams were conducting their work, no external criterion existed regarding the quality of their plans; thus, the expressed confidence is rooted more in the affective dynamics of the team itself than external indicators.

**Defensive Team Experiences: “This Is Pretty Vague…and Meaningless.”** In contrast, Blue teams exhibited much less optimism and confidence in the statements they made about their final products. This quote, from a member of the Blue Maritime/Chemical team, reflects the sentiment of members of many of the Blue teams. Similarly, a member of the Blue Air/Sea team commented in the team’s final work session, “The more I read, the less confidence I have in what we concluded.”

The evaluations of teams’ final products, displayed in Table 3, provide additional evidence of the breadth versus depth and creativity trade-off embodied in the work of offensive and defensive teams. As shown in the table, Blue teams’ reports exhibited more evidence of opinion diversity and use of external resources, whereas Red teams’ exhibited better use of member expertise and more creativity. Evaluators of the teams’ final products admired the breadth of information that the Blue teams were able to cover and expressed concern over some of the courses of action that Red teams did not explicitly consider. In their final reports, Blue teams presented a lot of different options, and often they had considered many more options in their discussions than were included in their final reports. In contrast, Red teams went very deeply into their selected plans of attack, and although two teams made mention of a few other possibilities they had considered and discarded, the other two teams made no mention of alternatives.

**Discussion**

This paper develops a process model of team strategic orientation based on a rare opportunity to look at analytic work in the intelligence community. The data in the current study support the conclusion that the strength of offensive or defensive team strategic orientation initiates a self-reinforcing cycle, where teams on offense embrace an outcome-focused strategy that encourages a
narrower search of information already held by members and energizing high-effort norms, whereas teams on defense follow a process-focused strategy, identifying more external information to be collected and evolving low-effort norms. Consequently, teams exhibit a breadth versus depth trade-off in their work products, in which teams on offense feel quite confident that they have arrived at the perfect solution and teams on defense are left with many possibilities but fewer conclusions.

This model extends what we know about strategic orientation in individuals and organizations to teams and has significant scholarly and practical implications. For scholars, the discrepancies in how these teams behaved given relatively similar inputs suggests the need to evaluate the extent to which offensive or defensive strategic orientations moderate other dynamics commonly observed in teams. For example, the lack of confidence demonstrated by defensive teams runs somewhat counter to work on group decision making. Existing research on confidence in teams suggests that putting decision makers in a group to work on a problem together translates into higher confidence in the ultimate decision (Smiezek and Henry 1989), especially if the group is cohesive (Lee et al. 2002). The current study suggests that team strategic orientation may moderate this effect.

Furthermore, creating a team offensive or defensive strategic orientation may occur much more subtly in other settings than was true in the current context. The teams examined here were assigned to offensive or defensive roles, but it is likely that members’ interpretation of their environment (Dutton et al. 1983, Dutton and Jackson 1987, Thomas and McDaniel 1990) could lead a team to instigate an offensive or defensive stance in situations in which they could choose either. Future research could examine the environmental cues that lead teams to fall into offensive or defensive behavior patterns.

This study also builds on the large and growing literature on the approach and inhibition systems in human behavior (Elliott 1999, Elliott and Friedman 2007, Keltner et al. 2003) and related work on self-regulatory focus (see Higgins 1997 for a review), which has more recently been extended to teams (Faddegon et al. 2008, 2009; Levine et al. 2000). The current work suggests that simply knowing that a team’s goal can be broadly characterized as “promotion” or “prevention” will not allow us to predict team behavior without knowing more about the assumptions members hold about the opponent or the problem they face. Problem scope and oppositional strength, which are influenced by strategic orientation, appear to have direct implications for team strategy and the use of member knowledge and skill versus external knowledge.

In terms of practical implications, it is possible that the training and work of government intelligence analysts is too idiosyncratic to generalize to other organizational settings. However, parallels with work on entrepreneurial decision making at the individual level (i.e., Moore et al. 2007) and the rise of competitive intelligence functions in business organizations (Ganesh et al. 2003) suggest that playing offense or defense is not exclusive to the military and intelligence communities. Furthermore, it could be argued that the task facing the Blue teams was inherently more difficult than the task facing Red, which could account for the observed behavior apart from their team strategic orientation. Although the observations suggest variance in the difficulty perceived both between and among Red and Blue teams, future research in more controlled settings should examine how altering the complexity and relative probability of success or failure of teams, independent of strategic orientation, contributes to the behavior patterns observed.

In addition to situations in which teams explicitly play offense or defense, the model developed in this paper can help us better understand the behavior of teams in which these orientations evolve more subtly and change over time, or even when facing a nonhuman opponent, such as the spread of a disease or a natural disaster. Teams in these situations may implicitly adopt an offensive or defensive strategic orientation, with implications for the perceptions and behavior that subsequently evolve. Thus, those charged with leading teams in competitive or adversarial situations should be cognizant of the possible consequences of playing offense or defense and be prepared to counter them.

Most standard analytic techniques used in both government and business settings (Heuer 1999) encourage the analyst to think more broadly in an effort to counter the tendencies of decision makers to develop tunnel vision and confirmation bias (Wason and Johnson-Laird 1968). Such techniques may be helpful when playing offense, where the natural tendency is toward too narrow a focus, but the techniques need to be supplemented with techniques to encourage more selective focus when playing defense. For example, recent work in forecasting demonstrates that using metaphors and role playing are effective tools for filtering qualitative information and
narrowing the options for predicting the likely activities of an opponent (Armstrong 2002, Green 2002). Similar approaches may be useful for helping focus the activities of teams playing defense, where the potential for overly broad analysis exists most. What is clear is that continuing to manage teams without considering the implications of team strategic orientation is likely a losing course of action, with potentially dire consequences.

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Endnotes
1Access to videotapes of team work in the intelligence community is extremely rare; we are indebted to project managers at the MITRE Corporation for undertaking the lengthy bureaucratic process of obtaining approval for recording the teams.
2These observers were cleared social scientists who were on site for other purposes but who were kind enough to provide support for analysis for this research, as it was not possible to involve research collaborators who did not have the required security clearances.
3Given the security implications associated with the topics of the teams’ work, the use of quotes and examples is limited, and portrayals of conversations sometimes include summaries of comments and placeholders for redacted material instead of verbatim transcriptions.

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