

McDonald's, McDonaldland, and McDonaldization: Humor and the dialogical approach  
to strategy

by

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### **Abstract**

Humor accomplishes a process of interanimation of the languages of corporate McDonald's, McDonaldland, and McDonaldization strategy. The purpose of our paper is to show how much of the academic strategy writing on corporate McDonald's is not interrelated with the sociology of McDonaldization, or even with the strategic fiction of McDonaldland. Academic strategy writing fails to define its rational theoretical position with respect to these other spheres. We therefore charge it with being sectarianism, in the habit of quoting within its sphere, but not forming a dialogical relationship. The paper will articulate the ways in which a more Bakhtinian theory of humor will facilitate the transition of management strategy towards a more dialogical approach. As well we look at Brecht and Boal for alternative formulations of humor strategy in the three spheres.

### **Introduction**

McDonald's like Southwest Air, and Disney strategically deploys humor, spending millions of dollars each year for something as frivolous as laughter. But is it really frivolous, merely a marketing gimmick to get more kids, more parents and more teens through the restaurant doors, a rational tool to support a rational strategy as mainstream management research seems to presume? Or is it an innocuous cover hiding the exploitation of low wage labor, the destruction of the environment, the slaughter of millions of animals and the global conquest of the industrial-fast-food-complex, still a rational tool for a rational strategy, but a strategy exposed as destructive by many of the sociologists, journalists and larger group of critics of McDonaldization (Ritzer, 1993)?

We agree that McDonald's strategy is all of those but that to conceive of McDonald's strategic use of humor in only a rational fashion, no matter how critical one's perspective, misses the underlying dynamic. Indeed it allows the very forces that continue to revitalize McDonald's in spite of its many critics to slip beneath the radar screen of organizational research. What management researchers and the McDonaldization critics from other disciplines have been missing is that McDonald's strategic use of humor is its strategic dialogic imagination (Bakhtin, 1981). In this imagination strategy is much more than rational plan sequentially developed and executed in linear space and time. In this imagination strategy is a linguistic circle with multiple chronotopes (Bakhtin, 1986) in which space and time are biographical, epic and novelesque and multiple voices and

speech genres narrate, dialogue and transform strategic discourse (Barry and Elmes, 1997) and rational strategy.

By dialogically imagining and linguistically transforming its strategy, McDonald's enacts its strategy across multiple spheres and by linking the spheres in a circular fashion has managed to find a source of revitalization in the most unlikely place, namely in its own refuse! By taking the mud that its critics have slung and using it to travel to what Bakhtin (1968) has termed the lower bodily stratum or the debasement through acts that involve parts of the lower body such as digestion and excretion (p. 370), McDonald's has, consciously or unconsciously, exploited its own degeneration and attained permanent rebirth and strategic revitalization. It has done so particularly in its grotesque imaginings of Ronald McDonald and the animated fantasy world of McDonaldland where cartoon characters with Simpsonsque features enact the corporate dialogic imagination and turn McDonaldization protests into religious celebration of Ronald the fast food messiah. So the antithesis produced by critics of McDonaldization defies Brechtian conceptions of sociopolitical developments (Willett, 1957) and has failed to produce the synthesis in which McDonald's strategy becomes reformed according to its critics. Moreover, anti-McDonaldization theatrics have been misappropriated. They are not only the theater of the oppressed (Boal, 1979), but also the theater of corporate revitalization in which degradation makes possible the descent into the world of the lower body, where we find not just digestion and excrement but the maternal womb from which are born new social worlds (Bakhtin, 1968) and newly revitalized corporate strategies in which Ronald McDonald is still hip and millions are still "Lovin' It" (new corporate ad slogan).

In this paper we examine how McDonald's enacts and integrates strategic linguistic circles across three spheres: McDonald's rational corporate strategy, McDonaldization containing the critical perspectives on this strategy and McDonaldland, the animated fantasy world of Ronald McDonald coming to life, for example, in the Whacky Adventures of Ronald McDonald videos produced by Klasky and Cuspo.

**Figure 1 – Three Intertextual Spheres of Strategic Fiction and Humor**



We proceed to explore each sphere as follows. We will give a brief overview of management literature on McDonald's strategy, followed by a brief overview of the McDonaldization literature and McDonalddland (for a full review of these, see Boje, Driver and Cai, 2004). We then proceed to an examination of the strategic linguistic circle and McDonald's dialogic imagination.

### **McDonald's Strategy in the Management Literature**

In table 1, we outline four different perspectives on McDonald's strategy, of which two provide at least some elements of a non-rational reading of strategy. So while the first two perspectives seem, entirely, to manifest the predominant rationalist perspective, i.e. strategy as the implementation of rational strategy through the use of rational processes such as Taylorism (Kelly, 1997), the latter two deviate from this perspective. The third perspective entitled rationalist/grotesque suggests that even in apparently rationalist interpretations of strategy elements of the non-rational may be found if one, for example noted Bakhtinian grotesque or ambivalent images of the corporate giant or military apparatus conquering the world. These images are not identified of course since they elude the rationalist assumptions underlying this perspective. Finally, the fourth perspective, albeit a very minor theme in the literature on McDonald's, seems to deviate entirely from the rational reading of strategy suggesting instead an interpretivist/critical reading that deconstructs strategy, for example, as narratives of power and subjectivity.

**Table 1 McDonald's Strategy in the Management Literature**

Perspective (Authors' interpretation)	Literature (Thematic examples from the management literature to illustrate each perspective)
Rationalist/Generalist: Conceives of strategy as rational plan and actions undertaken according to this plan. Strategy is viewed mechanistically and actions are interpreted at face value. Profit maximization and growth are seen as penultimate goals.	Strategy as rational plan to win and retain market share by developing core competencies and efficiency (Bachmann, 2002; Safferstone, 2002) modeled on and supported by information technology (Beam, 1996; 2002). Strategic decision-making is often based on simplistic dualities (Calori and Dufour, 1995) follows a rational step-by-step process to identify and exploit competitive advantage across all functions from diversity management (Robinson and Dechant, 1997) to location design (Nutt, 1999). Strategic goals are rational and aim at maximum growth through, for example, international expansion in China (Burton, Lan and Lu, 2000) or Russia (Wright, Hoskission, Filatotchev and Buck, 1998). While established decision-making rules and strategic goals provide a standardized model adjustments to local or changing conditions occur frequently (Hall, 2001). Consequently, changes in strategic practices such as hiring persons with disabilities (Reno, 1994), switching from teenage to older part-time workers (Feldman, 1990; Mirvis, 1997; Paul and Townsend, 1993), engaging in charitable activities (Ronald

	<p>McDonald houses, support of the disabled) (McWilliams, 2001), or adopting environmental programs (Anderson and Bateman, 2000; Berry and Rondinelli, 1998; Bradbury and Clair, 1999; Harrison and Caron, 1996; Jennings and Zandbergen, 1995; Rondinelli and London, 2003; Russo and Fouts, 1997; Starik and Rands, 1995) are all part of a rational plan to maximize profitability through optimal adjustment to current environmental conditions.</p>
<p>Rationalist/Taylorist: Strategy is viewed as rational plan with a focus on scientifically engineering business processes to maximize efficiency and standardize all areas of the organization.</p>	<p>The implementation of rationalist strategy is modeled on mechanistic models such as Taylorism and scientifically engineered, standardized business processes as a hallmark of what are seen as good management practices (Hallowell, Bowen and Knoop, 2002; Kelly, 1997; Marks and Mirvis, 2001). Successful strategic management is the application of Taylorist standards to micromanage core business processes from knowledge creation and dissemination (Quinn and Anderson, 1996) to product development and production (Meyer and DeTore, 1999), franchise administration (Combs and Ketchen, 1999), global vendor sourcing (Gupta and Govindarajan, 2001) and branding (Nayyar, 1993) while allowing for some variation at the periphery (Usher, 1999). It is part of a rationalist approach to expand the use of successful practices for continuous improvement, so it is rational to use Taylorist standardization to manage human resources (Gupta and Govindarajan, 2001), employee emotions (Wharton and Erickson, 1993) and customer behaviors (Bateson, 2002).</p>
<p>Rationalist/Grotesque: Strategy is conceived as rational plan but there are also elements of the Bakhtinian grotesque in more ambivalent images (which are not identified of course since they elude the rationalist assumptions underlying this perspective) of the corporate giant or military apparatus conquering the world concerned only with profitability while some stakeholders are disadvantaged and the corporation (has to?) seek redemption on a global scale.</p>	<p>Strategy is a rational plan to grow the firm and gain competitive advantage. The images with which this process is described for successful firms like McDonald's also hint at something beyond mechanistic rationality, namely the ambivalence that exists in the superlative, in the aggressive drive to win and the single-minded determination it takes to become more powerful than the competition. The literature, for example, alludes to images of warfare and military tactics suggesting that firms use size and brand-awareness to develop competitive defenses or moats that are hard to scale by competitors, presumably mortal enemies in the competitive battle (Sexton, 2001). In this competitive battle rational strategy is about gaining territory on a global scale (Ireland, Hitt and Camp, 2001) and developing global competitive weapons (Brock, 2000) that help protect and defend assets like intellectual property (Van Glinow and Clarke, 1995) against intruders but that also help to scan for and exploit new battle fields like the (former) Soviet Union (Shama, 1993). In competitive warfare few tactics seem inappropriate as the conquest requires ever more and ever cheaper resources and so it becomes acceptable and perhaps a sign of competitive cunning that lawyers are strategically trained to hire temporary workers while avoiding the IRS reclassifying them as permanent to reduce costs (Thomas, 2002), and that low wage hiring strategies offer little opportunity for the working poor (Kossek and Huber-Yoder, 1997). Moreover, because competitive warfare occasionally leads to actions that are interpreted as ruthless or at least as unfair, such as McDonald's not responding to recurrent claims and legal actions that its customers are scalded by coffee that is hotter than 180 degrees (Seiders and Barry,</p>

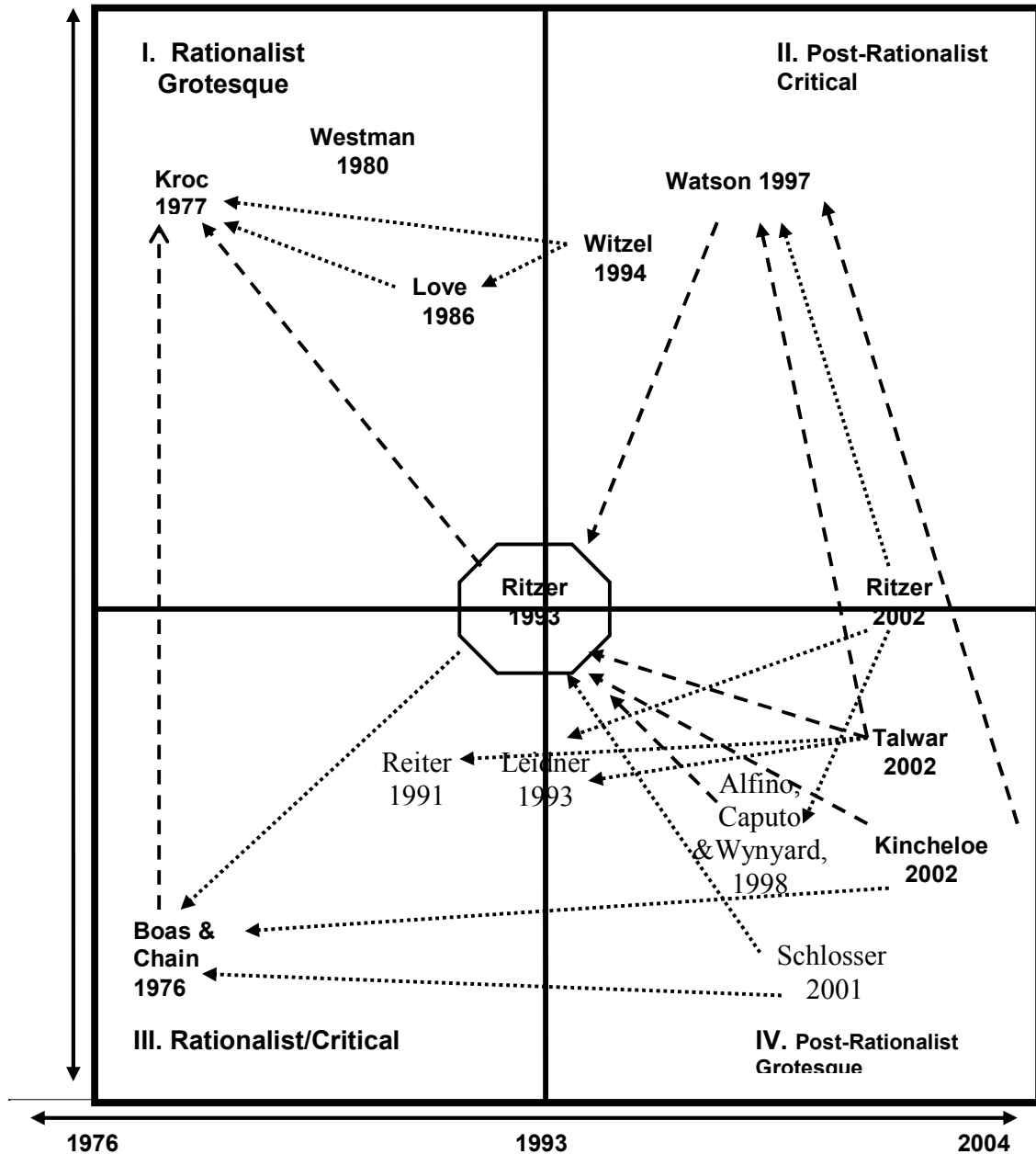
	1998), rational strategy also contains images of redemption by hiring disabled adults (Hall and Hall, 1994) or giving to charity as the corporation seeks to be known not just as global competitor but global citizen revered and protected from harm (Kanter and Dretler, 1998).
Interpreivist/Critical: Acknowledges that strategy is more than a rational plan and can be deconstructed so that power and subjectivity become transparent.	Uses a narrative approach to strategic management and shows how rhetorical devices are enacted to manage stakeholder concerns in ongoing discursive struggles (Starkey and Crane, 2003) in which rational strategy is the attempt to enact managerial power and control over stakeholders such as employees (Organ, McFillen, and Mitchell, 1985). Integrates critical conceptions of strategic goals such as globalization (Evans, 2002) and provides examples of rational strategy as enactments of power and control that are also resisted (Ashforth, 1993).

In summary, while, as shown in table 1, elements of non-rational readings of strategy may be found in the literature, the rational perspective on strategy dominates current management thinking, and, like perspectives on McDonaldization, seems to miss a more dialogical understanding of strategy.

### **Literature on McDonaldization from other Disciplines**

To provide insight into the McDonaldization literature, we have grouped the research into four quadrants. The four perspectives distilled here are: Rationalist/Grotesque, Rationalist/Critical, Post-Rationalist/Grotesque and Post-Rationalist/Critical. As shown in figure 2, Quadrant I is the Rationalist/Grotesque view of McDonaldization that views McDonald's strategy as rational plan implemented with Weberian precision (Ritzer, 1993) containing images of the Bakhtian grotesque (which are not identified of course since they elude the rationalist assumptions underlying this perspective) portraying McDonald's as a larger-than-life force of global, societal transformation. Quadrant III contains the Rationalist/Critical perspective, which agrees with Ritzer (1993) that McDonaldization is the product of a rational strategy but unlike Ritzer critiques this strategy and shows how societies can resist McDonaldization. Quadrant II contains the Post-Rationalist/Critical perspective, which disagrees with Ritzer (1993) that McDonaldization strategy is a rational plan, monologically interpreted and implemented, rather it is suggested that McDonaldization is appropriated and reinterpreted locally, resisted and subverted by individuals. Quadrant IV contains the Post-Rationalist/Grotesque perspective on McDonaldization as post-rational strategy to be interpreted and deconstructed, but also notes the grotesque elements of this strategy and suggests that its hubris and hyperbole may be signs of destruction and degeneration, the ridiculous and laughable end of McDonaldization.

Figure 2 – Literature on McDonaldization



Quadrants I and III are rationalist while Quadrants II and IV are post-rationalist. Moreover, Quadrant I is the source of the beginning of the good that later times evolve, such as in Quadrant II, then the opposite is true of the relation between Quadrants III and IV; the negative consequences identified in III are amplified in IV; for example

Schlosser, 2001 is basically a remake of Boas and Chain (1976) with more contemporary examples used to restate the earlier thesis. Yet the level of wit and satire of Boas and Chain is not equaled in the sequel; what Schlosser does succeed at, is translating the thesis into the post-industrial world; the work is also a positive mirror image of Ritzer's (1993) work; fast food nation becomes fast food world.

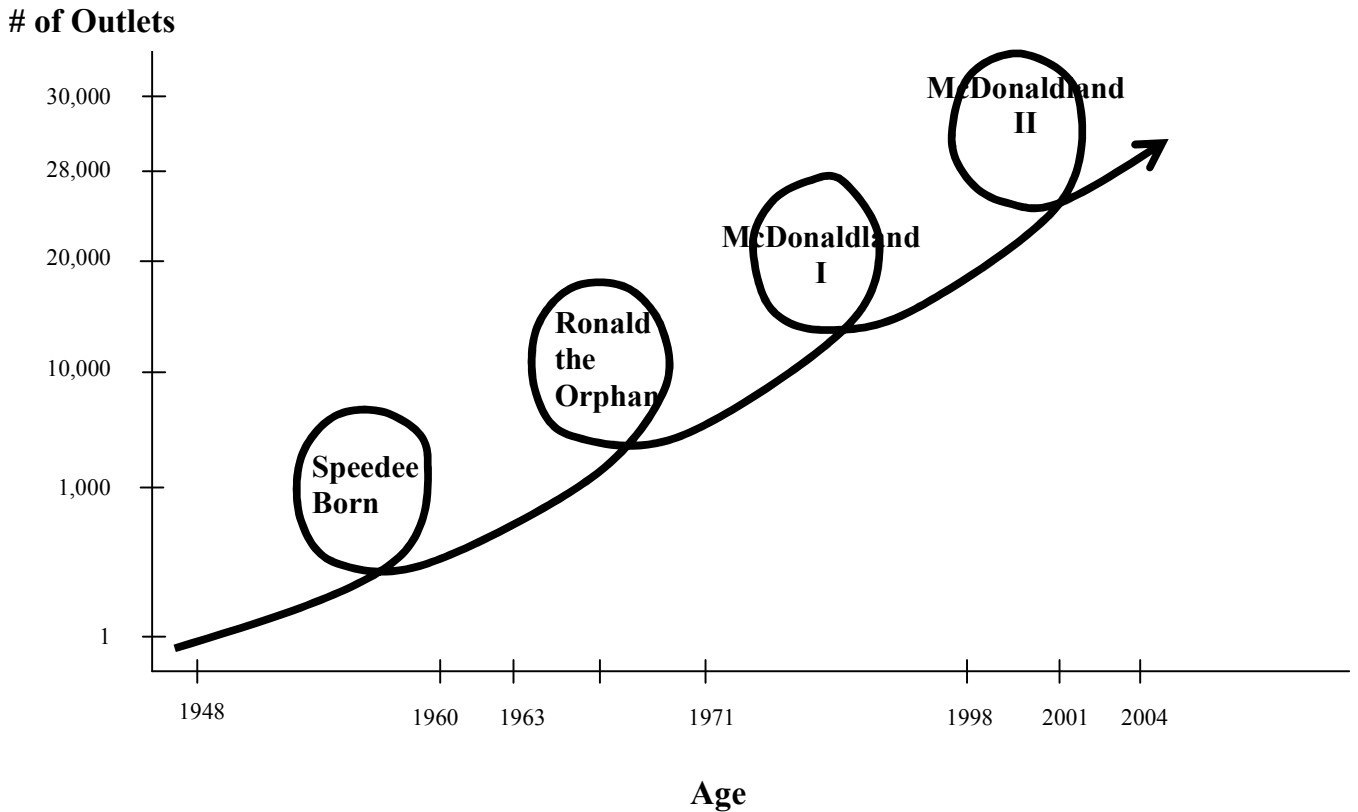
Quadrants I and III are epic works, (III the reversal of I; critiquing instead of lauding the hero). I and III are more monologues than dialogues, and with the proliferations of Ritzer critics, from fields ranging from sociology (Talwar, 2002), anthropology (Watson et al, 1997) and critical management theory (Parker, 1998) we believe that over time McDonaldization discourse is getting more multi-disciplinary, more plurivocal, and more dialogic; in short, we apply the term *novelesque*; epic discourse has begun and is continuing to become *novelesque*.

### **McDonaldland and Strategy as Dialogic Imagination**

We suggest that in the McDonaldland Klasky and Csupo videos McDonald's is dialogically imagining strategic changes, developing biography, enshrining ancient culture and giving McDonaldization museum status, and exploring the galactic expansion of McDonald's fast food empire. We believe (consciously or unconsciously) corporate McDonald's is running scenarios of its destiny, deciding how to extend its greatness, and exercising creatively its managerial force while, not just globally, but with super galactic aims: boldly going where no fast food giant has gone before, conquering fashion tastes, renewing vitality, creating something of enormous strategic consequence; perhaps even repeating its motif in space.

The strategic metamorphosis focuses on grotesque humor, focuses on the body, not just corporate, but the human body, even the fictitious clown body of Ronald and his companions undergoing historical transformations to keep current with fashion trends. As shown in figure 3, based on Greiner's model (1972), we created a timeline of the evolution and revolutions in Ronald's and his companions' bodies and the clownery at McDonald's (and McDonaldland). Clownery has undergone several important shifts, since the early days of Speedee (i.e. Bozo the clown 1960-1963; Ronald 1963; McDonaldland companions, 1971; revitalization of McDonaldland, 1998-2002). The loops in Figure two represent the revolutions in each McDonald epoch, from Speedee (1948-1960), Bozo (1960-1963), Ronald as only child (1963-1970), to the disco phase of McDonaldland (1971-1989) to its rejuvenation in the McDonaldland of Klasky-Csupo (1989-2002). In each revolution humor and strategic fiction renew the clownery to be more compatible with popular culture and humor fashion. In between the cycles, the humor evolves, but does not drastically change. For example, the change from Speedee to Bozo, from these to Ronald, and adding characters to constitute a McDonaldland are more radical and revolutionary. Adding a character, such as Birdee (1980) the first female, or retiring a character, such as the Professor (1971-1978) is more evolutionary (tinkering with the mix). While the make-over of McDonaldland in the video series by Klasky-Csupo (1989-2002) is revolutionary as not only Ronald but also Hamburglar and Birdie are transformed and several characters are added (Tika, Franklin and Sundae).

**Figure 3 – Evolutions and Revolutions in McDonaldland Fiction and Humor**



Strategic metamorphosis is visual dramatization and transformation of rational strategy. This is the third sphere in figure 1, McDonaldland, where fiction and humor are used strategically to transform and regenerate strategy. In this sphere, we use Bakhtin’s (1968) method to illustrate how McDonald’s uses dialogic imagination to transform its strategy. Through this dialogic imagination and cyclical movement between chronotopes, the temporary vertical descent into and ascent from the animated underworld as depicted in the McDonaldland videos for example becomes transformative to the horizontal reality of time and space. That is, grotesque humor degrades fictitious actors as they descend into a world of lower bodily functions, degenerating into grotesque and ridiculous caricatures of themselves. But because of and through this degeneration, the fictitious actors also gain access to miraculous transformation and redeem and regenerate as they ascend from this lower bodily stratum. The lower bodily stratum symbolizes death as well as fertility as the McDonaldland characters are reduced to excrement but are also re-born from the womb.

This descent/ascent is movement on the vertical temporal plane but also on the horizontal plane of the social system in which this movement takes place. In a world of dialogic imagination, multiple voices and competing definitions (heteroglossia): “there is a constant interaction between meanings, all of which have the potential of conditioning

others” (Bakhtin, 1981: 426). Through the use of grotesque fiction and humor actors and behaviors undergo a dialectic transformation and metamorphosis in which degradation is turned into transformation in their social context. So the degradation and regeneration in the fictitious sphere allows for transformation in reality, which Bakhtin (1968) captures by analyzing a series of words all beginning with “R”: renewal, rebirth, regeneration, reconstruction, and revitalization. Grotesque humor, then defines a path of transformation by decent into the underworld degradations, that accomplishes social R’s, in the cycle of decent (death) and ascent (metamorphosis).

Our model suggests that strategy as narrative (Barry and Elmes, 1997) allows firms to engage in exactly this kind of transformation through the use of relative space and time, what Bakhtin refers to as chronotope (1981), fiction and humor. Particularly, we suggest that McDonald’s uses fiction and humor strategically to cross back and forth between various chronotopes, such as, for example, the biographical chronotope embodied in its corporate history (see Kroc and Anderson, 1976), the epic chronotope in the McDonaldization literature and the novelesque chronotope of McDonaldland. Moreover, by conceiving of McDonald’s strategy as multi-spatial/dimensional creates a multi-storied narrative that can transfer vertical power of descent into the underworld of the novelesque chronotope (McDonaldland) in order to ascend from it with historic cultural power of the epic chronotope of McDonaldization to affect the biographical chronotope and gain advantage along the horizontal plane of McDonald’s strategy enacted in the marketplace.

Through strategy as dialogic imagination, space and time are redefined as chronotopes and McDonaldland allows McDonald’s corporation to descend into the lower bodily stratum where the mud slinging and degradation of its critics (McDonaldization) contributes to the “spectacle of the marketplace” (Bakhtin, 1968: 393) and provides new avenues for degeneration but also regeneration. As McDonald’s plays with grotesque fiction and humor in McDonaldland, it develops its dialogic imagination, so that transformations experienced by the fictitious characters of McDonaldland feed into its strategic narrative (Barry and Elmes, 1997) regenerating its rational strategy and contributing to its enormous success in the marketplace, one indicator of which is the increase in number of McDonald’s outlets, as shown in figure 2. Therefore, what is shown in figure 2 is how McDonald’s fiction and humor has evolved over time, but also, more importantly, we argue it may show how McDonald’s has learned to use this sphere and the fiction and humor that embody McDonaldland to imagine and implement transformations of its strategy.

## **Conclusion**

In this paper we have argued that management researchers and critics of McDonaldization have failed to theorize McDonald’s strategic use of humor and its strategic dialogic imagination (Bakhtin, 1981). We have suggested that by dialogically imagining and linguistically transforming its strategy, McDonald’s enacts its strategy across multiple spheres and by linking the spheres in a circular fashion has managed to find a source of revitalization heretofore undetected by organizational researchers.

We suggest that researchers and critics alike have missed this important dynamic not only because they focus predominantly on rationalist conceptions of strategy but also because they do not recognize the important regenerative role of grotesque humor as theorized by Bakhtin (1968). Moreover, even those that seek to use humor for more critical ends, such as the anti-McDonaldization groups who mock McDonald's by defaming Ronald as Jesus on the Cross and other degrading depictions of McDonald hyperbole, miss humor as used in a Bakhtinian fashion. So we end up with a dualistic and at best dialectic, in the Brechtian sense (Willett, 1957), conception of humor in which humor is either thesis, namely that which McDonald's uses to enhance profits and increase market share, or antithesis, in which humor is the weapon through which McDonald's strategy is exposed as exploitative.

Such conceptions of humor as antithetical force suggest that humor can be enacted as theater of the oppressed and can turn spectators into actors engaging in resistance and active struggle against their oppressors (Boal, 1979) here McDonald's. But what if thesis and antithesis were not enacted as struggle (Boal, 1979; Willett, 1957) but rather as complementary creative cycle a la Bakhtin (1968)? Of course even Bakhtin conceived of this creative process as one that works against the oppressors, the powerful, the established order and for the oppressed in the creation of a world in which they are more equal, freed from the binds of oppression (Bakhtin, 1968).

So what if McDonald's appropriated Bakhtin's idea of regenerative humor (1968) for its own purposes? We suggest they may have! We think that McDonald's has, consciously or unconsciously, exploited its own degeneration and attained permanent strategic revitalization through its grotesque imaginings of Ronald McDonald and the animated fantasy world of McDonaldland. Here McDonald's enacts its corporate dialogic imagination and turns McDonaldization protests into fast-food feasts in the theater of corporate revitalization in which degradation makes possible the descent into the world of the maternal womb gives birth to newly revitalized, more generation-appropriate corporate strategies.

There are two implications of overlooking this appropriation, one is theoretical, the other practical. The theoretical implication is that researchers need to develop less rationalist models of strategy in which humor and dialogic imagining can be theorized not just for the particular case of McDonald's but also for the many other companies that are investing into corporate humor, such as Southwest Airlines. Additionally, narrative conceptualizations of strategy (Barry and Elmes, 1997) need to be expanded to take into account Bakhtinian, linguistic transformations of strategy through the strategic use of degenerative and generative humor, which means studying both official corporate humor and unofficial activist and critical humor. For research on McDonald's in particular this would require a more interdisciplinary approach in which McDonald's management researchers and McDonaldization social scientists, critics and journalists more actively engage with each other.

On a similar note, and this pertains to the practical implication of this paper, McDonald's supporters and McDonaldization critics need to understand that a rationalist approach to humor hugely underestimates the importance of humor as a regenerative force. If humor is become an effective weapon in the struggle against McDonaldization, its power to regenerate strategies resistors may aim to degenerate must be better understood. This understanding then may lead to a rethinking of humor as weapon of resistance. If degenerative humor not only supports the status quo (Collinson, 1988) but feeds strategic renewal, then perhaps it's time to get serious about humor and watch for misappropriation and new opportunities. If McDonald's swallows activist humor to regenerate, a new strategy may be to ensure that this very process is made transparent or to create humor that can't easily be swallowed or digested. We think a good joke is in order!

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