

# **Being Strategic:**

*Plan for Success; Outthink Your Competitors;*

*Stay Ahead of Change*

*By Erika Andersen*

## **Introduction: If I Hear the Word “Strategic” One More Time, I’ll....**

How many times, over the past few months, have you sat in a meeting and heard someone use the word “strategic?” As in: ““We’re not being very strategic about this” or “We need a strategic plan for project X.” And, if your company is like most companies, everyone in the meeting nods wisely; the meeting goes on; people continue to debate how to approach the situation at hand, with – generally – no one the wiser as to what the speaker actually meant by the word “strategic.”

What an odd thing this is, when you think about it. Here’s a word that gets used all the time, in a variety of contexts – and people have no common definition for it. That’s pretty unusual: whether we’re saying “apple” or “sunlight,” or something less tangible like “embarrassment” or “realization,” there’s generally a shared definition. If you ask ten people what “embarrassment” means, you get pretty much the same story.

However, if you were in a meeting where the word “strategic” had just been used, and you could magically put little bubbles over people’s heads that showed what they were thinking, I’d almost guarantee there wouldn’t be much overlap. Let’s try it:

The boss says, “We’re not being very strategic about this,” and her thought bubble says, *Everyone’s just focusing on their own department.*

Maybe the CFO thinks, *Yeah, nobody’s considering the financial implications.*

And the newly minted MBA in the group thinks *Right— strategy! Market forces! ROI! Human capital investment!*

The CTO's thought bubble says, *That's for sure – we don't measure anything around here. We just fly by the seat of our pants.*

The COO sighs and thinks, *Oh, great, this means taking months to develop a multi-year strategic plan that will go in a binder and sit on somebody's shelf.*

The VP of Sales is nodding and thinking, *She's right – we need to be MUCH more focused on outsmarting the competition.*

The head of production thinks, *Yeah, nobody around here plans more than about ten minutes ahead.*

Others will say to themselves, *The hell with strategy – I've got deadlines!*

And it's almost a sure bet that at least one person at the meeting will be thinking, *Umm...strategy?*

To add to the confusion, if you've read any of the many books available on strategy and strategic thinking, you'll find very little agreement there, either. Some offer principles; some prescribe actions; some promote certain ways of thinking. A great many of the books on strategy talk about it as though it's just an in-depth version of financial modeling, or purely focused on the competition. And most of them talk about strategy as though it's something that's only applicable to big, organization-wide decisions. Many describe strategy or strategic thinking as being such a complex undertaking, and so separate from daily action, that you, the reader, immediately say to yourself: "Oh, now I see why companies have strategic planning functions – no one could do this and still have time for their day job!"

***OK, so let's just stop saying it, and maybe it will go away....***

Should we all make a solemn pact never to use the word strategic again? It's tempting...but no. Just because it's ill-defined, and referred to in confusing and contradictory ways, that doesn't mean "being strategic" isn't an actual (and even a useful) thing. In fact, I'd like to propose to you that there is something both real and important behind all this confusion – that "being strategic" is actually a deeply useful capability, and one that most people can develop.

Being strategic isn't just about making complex long-range business plans or doing in-depth market analyses (although the ability to think strategically is essential to doing either of those things well). Being strategic – as I'd like to define it here – involves a way of thinking and a set of skills that are applicable to almost any decision, large or small, professional or personal.

### ***Why This Book Now?***

It's a wild time. Every day, each of us faces more choices than our grandparents confronted in a lifetime: what to say, wear, eat, think, read, watch; what to accomplish; who to be. And not only can we make any of a dozen or a hundred choices at a given moment, we have to deal with all the information available to us *about* those choices, and figure out what's relevant in making our decision.

And it keeps accelerating. In 2000, a research group at the University of California, Berkeley estimated the amount of new information produced that year at 250 megabytes for every man, woman and child on the planet. A megabyte is roughly the amount of data in a five-hundred page book. Think about that: 6 billion people times 250 thick books worth of *new* information, each and every year.

How on earth can we usefully sort through this onslaught of information and possibility to create the life, the career, the business we want for ourselves?

Helping people answer that question is the core of my work: it's at the heart of the consulting and coaching practice I've built with my colleagues over the past twenty years. When people ask what my company does, I say we help organizations and individuals "clarify and move toward their hoped-for future." That's another way of saying we support our clients in deciding what's most important to them, of all the possibilities available, and then making the choices that will keep them moving in that direction. Whether we're meeting one-on-one with the executives we coach, or working with the senior teams of our client companies, we offer them skills and guidelines for defining and then crafting the career or the organization they envision. I intend, in writing this book, to share those approaches with you; to give you a way to make sense of what's around you – so that, even though we may never meet face-to-face, you'll be better able to "choose well": to clarify and move toward your own hoped-for professional future. In fact, I'd like to propose to you a definition for being strategic, based on that capability:

*Being strategic means consistently making those core directional choices that will best move you toward your hoped-for future.*

This is, I think, a deceptively simple sentence. It implies that you know where you're starting from, you're clear on where you want to go, and you have the means and the will to make consistently good and powerful choices about how to get there. You can use this capability that I call being strategic to guide you through this wild time of ours.

Most important, especially for our purposes here, I think that being strategic is primarily a learnable skill. When I share this idea with others, they're generally surprised: I've noticed that, when people say of someone "he (or she) isn't very strategic," they use the same tone as if they were saying the person can't sing, or has poor eyesight – that the lack of strategic thinking is something built-in, irrevocable. Certainly some people have more natural talent in this area than do others, but I've come to believe (and have had my belief confirmed over and over) that almost anyone can improve his or her ability to think strategically – and reap the professional and personal rewards that follow.

## ***A Word About Purpose***

Someone for whom I have a lot of respect asked me, on reading the initial manuscript for this book, how my definition of being strategic relates to “purpose,” or “mission.” I’ll talk about this specifically later in the book, when I discuss helping a group define its mission as the foundation for being strategic about the future of their organization, but I also want to address it in a more general way here, as we’re getting started. The beauty of being strategic as I’ve defined it, of thinking and acting in this way, is that it’s almost universally useful. Whether your “hoped-for future” is something as straightforward and practical as “I want to be the head of my department,” or as deeply purpose-driven as “I want to find the work that’s most satisfying to me and most beneficial to the world,” you will be much more likely to achieve it if you get very clear about what it is you want, and then consistently make the core directional choices...

And at this point, I also want to re-emphasize that this capability isn’t something just for leaders, business development execs or consultants; I’ve known assistants and sales clerks, homemakers and carpenters who demonstrate this capacity. Having this capacity makes them more effective at what they do. An example: think about being served by a waitress who’s just trying to get through her shift and who sees you – if she thinks about it at all – as an impediment to her ability to take a cigarette break. Now, think about the experience of being served by a waitress who’s putting herself through school and knows that the better job she does serving you, the bigger tip she’s going to get and the more likely she is to be able to pay for school and graduate next spring. One is just going through the motions, and one is consistently making those core directional choices.... You get the idea. The essence of what we’ll be talking about here is strategy as a way of seeing and living your life; a set of mental models and a way of acting on them that allows you to *create the kind of life you want*.

## ***Being Strategic with a Group***

But what about the “team” aspect of being strategic? You can find shelves full of books that tell you how important it is to “have a strategy” for your business. And I do agree that’s important – I just think the way most businesses go about doing strategic planning isn’t as effective as it could be. Quite often businesses “hire a strategy person” or create a “strategic planning function,” as though strategy is something esoteric and apart from daily work life; an arcane lore that only certain people can understand and master. And all too often – to my earlier point about a lack of common definition – “strategy” is used to mean simply financial business modeling (financial modeling is important, but it can become an unfortunate substitute for thinking holistically about the business you want to create). I believe that approaching business strategically can be much more ‘normal’ than all this – and that those most closely involved, day-to-day, in a business’s success can and should craft the strategic direction for that business.

Strategy that’s developed in this way is integral as opposed to extrinsic: people understand it and are committed to it; they know why it’s important and what it will take to make it happen. It becomes an agreed-upon map for action that everyone shares, and to which everyone is able to refer in deciding how to operate day-to-day.

I’ve also been witness to the myriad problems that can arise when people haven’t developed this capability to be strategic. In working with a wide variety of people in many different kinds of organizations – and also as a citizen, friend and parent – I’ve seen careers stall out; people lose sight of their true intentions and drift into lives that don’t satisfy them; teams devolve into useless wrangling; and companies wander down unprofitable and ill-considered paths, all for the lack of good, clear, comprehensive strategic thinking.

### ***How We’ll Do This***

Because I want you to be able to think and behave differently by the time you’ve finished this book, I’ll approach this topic in the same way I approach coaching executives or working with senior teams: it will be a blend of theory and practice, complete with

definitions and explanations, calls for self-reflection and suggestions for things to try and things to think about. Of course, since we're not actually sitting together in the same room, we'll have to be a little creative in our "conversation." For that reason, I've tried to make this book flexible enough to accommodate your preferred approach to learning. You may be the sort of person who likes to read straight through a whole book and then do the activities later; or it may appeal to you more to read in small chunks, with time for thought and trying-it-out in between; or you might want to read and do the activities in exactly the way they're offered. Any way that works for you is fine with me: my only wish is that, by the end of our time together, you feel that you know what it means to be strategic, why it's important to you to have this capability, and how to do it.

So, let's explore this together. In the first part of the book, I'll expand on the simple definition I've offered above, and teach you a practical approach for being strategic – including both skills and mindset – that you can use every day, in every aspect of your life. Then, in the second part of the book, I'll teach you how to apply your strategic skills and mindset in working with groups, so that you can help any collection of people – from your team at work, to the board of your favorite charity, or your kids' school's fundraising committee – to clarify and move toward their hoped-for-future. Just to give you a sense of the path before us, and what you'll read and do along the way, here's a summary of the ideas and skills you'll find in each chapter:

### **1) The Castle on the Hill**

Here comes the metaphor: throughout the book I'll use the idea of building a castle on a hill as a metaphor for the process of thinking strategically. In this first chapter I'll introduce a historical example of castle-building that we'll keep coming back to throughout the book. In addition, I'll offer an example of a company we helped to re-invent their future by using this approach.

## **Part I: Being Strategic Every Day**

### **2) Defining the Challenge: How Can We...?**

Whether you're trying to achieve something purely practical (building an actual castle) or to understand and fulfill your overall purpose in life – getting clear about your core challenge is an essential foundation for being strategic. In this chapter, I'll share with you an approach for focusing your thinking, so that you can clearly define the areas about which you want to think strategically. I'll provide business and personal examples of those ah-ha moments when a challenge crystallized, and then help you learn to create those ah-has for yourself: to define the essence of the challenge facing you.

### **3) *What Is: Pulling Back the Camera***

If you were really going to build a castle on a hill, it would be essential to make sure you had a clear understanding of your current situation before beginning. You'd ask questions like: "How many people are there to help build?" "What skills do they have?" "Is there stone around we can use, or will we have to import it?" You'd also look to the past, to see what's been tried before, and whether it worked – Has anyone built a castle on this hill in times past? If so, what happened to it? This chapter will explore the first step in being strategic: getting clear about "what is," that is, the most important parts of the current situation, including how the current situation has evolved from the past.

### **4) *What's the Hope: Reasonable Aspiration***

Imagine a group of castle builders standing in the valley, all in agreement about their current situation. Then imagine they just start racing up the hill to begin building, without agreeing on their vision for the castle. Some people stop halfway up the slope and begin building grass huts, some people get all the way to the top and start laying out the foundations for a marble palace; yet a third group starts arguing with everyone – they think the whole group should be putting up geodesic domes! This chapter explores the importance of clarifying the future you intend before beginning to move toward it. I'll teach you an approach for clearly envisioning your hoped-for-future – in any area of your life or business.

### **5) *What's In the Way: Facing the Facts***

Once you know where you're starting from and where you want to go, the next step is to look very clearly at the impediments that lie between you and the achievement of your goal. In our "castle on the hill" metaphor, you're still standing in the valley. You're clear about the resources available to you. You're all in agreement about the kind of castle you want. Now it's time to get clear about the obstacles you're going to have to overcome in order to create your castle. Are there sheer rock faces between you and the top of the hill? Are there trolls lurking under the bridge? You'd better find out before you begin. In this chapter, I'll talk about this part of the process of being strategic, and explore why people so often avoid it. Then I'll share ways to stay open to information about potential difficulties even when it feels uncomfortable or disheartening, so you can assess the obstacles in your path with accuracy and hopefulness.

#### **6) *What's the Path: Roadway First, Then Asphalt***

Okay. You're standing in the valley, you've got your blueprints for the castle, and you know where the trolls and sinkholes are on the way to the top. So, do you just pick up your tools and start walking uphill? No. First, you need to make foundational decisions about how you're going to approach this massive undertaking. This step of the process is central to being strategic – and the point where many people, even if they've made it this far, are most likely to run off the rails and just start "doing stuff." I'll show you how this is the critical juncture in any endeavor – the point where people tend to devolve into tactics, and where staying focused on the big picture is most essential to overall success.

#### **7) *The Art of Crafting Strategy***

This chapter is the heart of the book. Selecting effective strategies to achieve your vision allows you to consistently make those choices that will best help you achieve the future you've envisioned. It gives you a framework for making best use of resources, deciding which actions to take, and staying focused on the things that are most important to you. Ironically, this part of being strategic is generally thought of as the least practical and most esoteric (Highly-paid consultants speaking strange languages! Big binders full of unintelligible jargon! No connection to day-to-day reality!) I'll de-mystify strategy for

you by teaching you, practically and simply, how to select strategies that will move you toward your hoped-for future, and that will provide the best basis for choosing tactics.

## **8) Tactics That Work**

Good tactical planning is the final step in strategic thinking. Whether you're building a castle, a career or a department, this is the point where you decide the specific "who, what and when" that will take you from where you are now to where you want to go. I'll show you how to use your strategies as a basis for determining these tactics: good strategies serve as a "screening device" to help you choose the things you *most need* to do from the thousands of things you *could* do to move toward your vision. In this chapter, I'll discuss the main ways in which people get derailed during tactical planning, and then give you a chance to complete this part of the process.

## **9) Building on Success**

Renovating your castle ought to be easier and faster than building it initially, if you have a way to assess what worked and what didn't the first time around, and to incorporate that understanding into your process the next time. This chapter will focus on reviewing the work you've done to implement your strategic plan, and then "repositioning" for even better results going forward. We'll talk first about how to set up a simple system to hold yourself accountable for implementing your strategy; then I'll teach you an approach for learning from what's happened, without getting distracted by blame or finger-pointing (even at yourself).

## **10) The Castle of You**

Now that you understand "strategy" and "being strategic," and you have the practical tools at your command, I'll encourage you to think through one very important way you might use your new skills. Throughout the book, I'll discuss and demonstrate the different steps of the model in a wide variety of situations: in this chapter, I'll reflect on the lives of real people who have achieved their dreams – whatever those dreams might be – by using the principles of strategic thinking we've explored here. Then, with these

folks as clarifying and inspiring models, you'll have the chance to use your newly honed skills to make an overall plan for the career and life *you* want. At the end of this last chapter in Part I, you'll create self-talk to help you stay focused and positive as you move toward your hoped-for future.

## **Part II: Being Strategic With a Group**

### **11) Inviting Others Into the Process**

In this chapter, I'll provide an overview of the similarities and differences between applying your "being strategic" skills and mindset personally, and applying them as a member of a group. When working with a group or team, you need to invite them into the process. I'll offer you a way of doing this that's most likely to generate curiosity, enthusiasm and – ultimately – willing participation, so they can also benefit from this approach. We'll continue with our castle-building example, this time focusing on what it took to get others involved in and committed to the process.

### **12) Crafting a Strategic Vision**

Over the past twenty years, I've supported dozens of teams and companies in being strategic. I've found out a lot about how to apply this approach in a group setting, and have learned even more from my colleagues at Proteus as they work with their clients on being strategic. In this chapter I'll share with you the essence of what we've learned: practical techniques and approaches for "translating" each of the steps of being strategic into a group setting.

### **13) The Art of Facilitation**

Being able to help a group think and act strategically requires not only being able to think and act that way yourself (and knowing how to modify the process for a group), but also having some skills for supporting the group to move through the process well. In this chapter, I'll offer you core skills for group facilitation. A bonus: these skills are – as

Marty Seldman, a former business partner, used to say – “core, multi-use skills.” You can use the facilitation skills you’ll learn in this chapter to manage any kind of meeting or group process.

#### **14) Strategy as a Way of Life**

In this chapter, I’ll focus on how to help groups hold themselves accountable to the strategic vision they’ve created. I’ll also discuss how to facilitate a “repositioning” meeting after 4-6 months, and a full “vision reboot” 12-18 months later, to help the group reflect on and learn from what they’ve done, and to revise their original plan as needed to keep moving toward their hoped-for future. In other words, you’ll learn how to keep the process going past the initial vision and strategy session – so that your group actually uses the ‘strategic map’ they’ve created as guidance system for their own success.

#### **15) Castle-building for Fun and Profit**

I’d be really sad if you read this book, found it valuable, and then didn’t use what you learned! So, this final chapter of the book gives you a chance to decide how to keep deepening your understanding and application of this approach. We’ll talk about how people get in the way of their own learning – and how to keep that from happening. You’ll make a few commitments to yourself; things you intend to do in order to support yourself in becoming ever more strategic in your thinking and your approach. Finally, I’ll encourage you to create a simple memory aid to remind yourself why this is something you want to do – and to reaffirm your ability to do it.

That’s it. In the first chapter, I’ll offer a more in-depth explanation of the basic model for being strategic, and then we’ll spend the rest of our time together digging into the model, taking it apart, and putting it back together. I’ll give you chances to practice each part of it. By the time you turn the final page, I want you to feel that you can use this model to think more clearly and act more successfully: by yourself and with others, as a boss and as a member of a team, with your spouse or children – and in challenges as personal as planning for the perfect job, or as large-scale and impactful as determining the future of your company.

I truly hope you'll find this book engaging, enjoyable, and useful to you in every part of your life. If you'd like to let me know what you thought about it, or find out more about my company and the work we do, I'd love to hear from you: please feel free to email me at [connect@proteus-international.com](mailto:connect@proteus-international.com).

Bon voyage!

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