



Office of Strategic Consulting
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Anatomy of a Strategy

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*A better idea
than my own
is to listen*

–Mark Twain

*Swift & obvious
penalties pursue
those who treat
other's
requirements in
a cavalier,
lighthearted
fashion!*

–Ken Blanchard

*If you are
irritated by
every rub, how
will you be
polished?*

–Rumi

Hi, I'm Jacob

*Everything turns.
Everything is burning.
But not all burning is the
same. Some fires kindle
freedom. Some fires
consolidate bondage.
Do you know the
difference?*

–Li-Young Lee

*The seed is in the ground.
Now may we rest in hope
as darkness does its work*

–Wendell Berry

*Have a very good reason
for everything you do*

–Laurence Olivier



*The road is made by
walking*

–Antonio Machado

*The map is not the
territory*

–Alfred Korzybski



Let's chat

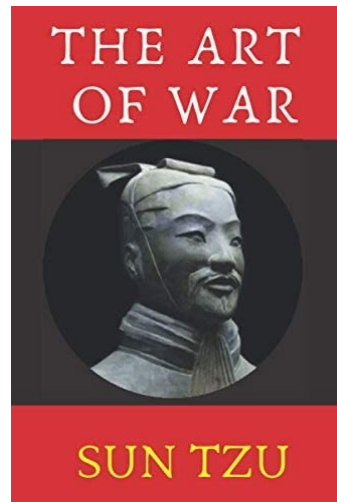
Introduce yourself to those in your breakout room. Share the work you do and where you do it...then discuss:

- ▶ What is the first thing that comes to mind when you hear the word 'strategic'?
- ▶ What causes your eyebrows to raise around strategic planning?
- ▶ What do you hope to leave this session with?



The Origins of Strategy

- The concept of a strategy originated from the need for people to defeat their enemies. The word *strategy* has its roots in warfare and is derived indirectly from Greek *strategos*, which means ‘general’
- Historic military conflicts and events have shaped varying approaches and tools to organizational strategy development



Chinese strategy origin:
Sun Tzu's 'The Art of War' (400 BC)
addresses the general definition of a strategy, up to the usage of tactics (Militarily)



The Origins of Strategy

- Strategy development and strategic planning are part of a broader field of study and practice called **strategic management**, which aims to:
 - maximize an organization's use of resources (+)
 - link planning with implementation (=)
 - increase an organization's competitiveness or position it for success
- The development of strategic planning and strategy development concepts, tools, and practices largely comes from the world of business
 - Strategic planning became a popular business/organizational practice in the 1950-60s
 - Today, strategic planning is considered one of the most widely and regularly used organizational management tools



'...but higher ed is not business!'

Some differences between for-profit business and academic cultures:

- Top-down leadership **vs.** distributive leadership
 - Chain of command **vs.** individual agency and autonomy
 - Shareholders **vs.** stakeholders
 - Macro **vs.** micro competition
 - Singular **vs.** multiple missions (profits vs. teaching, research, and outreach)
 - **What else? What's similar?**
-
- ❖ **In for-profit organizations**, strategic planning is often undertaken to beat competition and maximize profit and market share.
 - ❖ **In the public/non-profit sectors**, strategic planning is often undertaken to achieve goal alignment, ensure continuity of effort, and increase performance-related effectiveness.

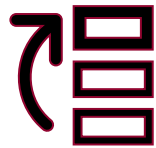
Regardless of field, strategy development and strategic planning set a course to more sustainable organizational future



Strategy: What and Why



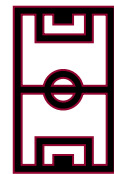
Strategy serves as road map to organizational change and transformation



Strategy is about understanding how multiple actions/tactics can build upon one another to increase the combined impact of all



Strategy aids us in making smarter choices among competing priorities



Strategy is fundamentally about answering two key questions: 1) Where to play and 2) how to succeed



Strategy's essence is judiciousness - choosing what not to do and selecting actions that will bring about the greatest benefit



Strategy enables us to reach our vision while living in and delivering on our purpose



Strategy helps create forward movement in unknown and unknowable environments



What makes something strategic?

- A firm understanding of the current landscape of your organization, including its competitive and collaborative capabilities, challenges, and advantages
- Knowledge of the culture and dynamics of the system being planned for
- A future focus on what may block you from achieving your vision - and how to influence it
- Initial emphasis on the broad agenda and then to a more selective action stance
- Complete thinking about purposes, goals, and situational requirements
- Attention to potential implementation challenges as strategies are formulated.

Within higher ed: knowledge of/attention to **competition, customers, and stakeholders:**

- ✓ Other individuals applying for grants (governmental agencies, foundations)
- ✓ Other campus units vying for the same resources (administration, partners)
- ✓ Other institutions (administration, faculty, staff)
- ✓ Those using your products or services (students, faculty, staff, guests)
- ✓ Those whose work closely connects with yours (other divisions/offices)
- ✓ **What/who else?**



Strategy + Planning = Strategic Planning

- ▶ **Strategy** development is a journey, looking into and imagining the future
- ▶ **Planning** is a process of establishing goals and defining the methods of goal attainment
- ▶ A **strategy** is not a **plan**, it is a framework for decision-making, a set of principles that can be applied as the situation evolves
- ▶ **Planning** is about how to do things right, whereas **strategy** is about choosing the right things to do



A strategy without a plan may simply be a wish

In strategic planning, strategy development is the purpose for which you plan

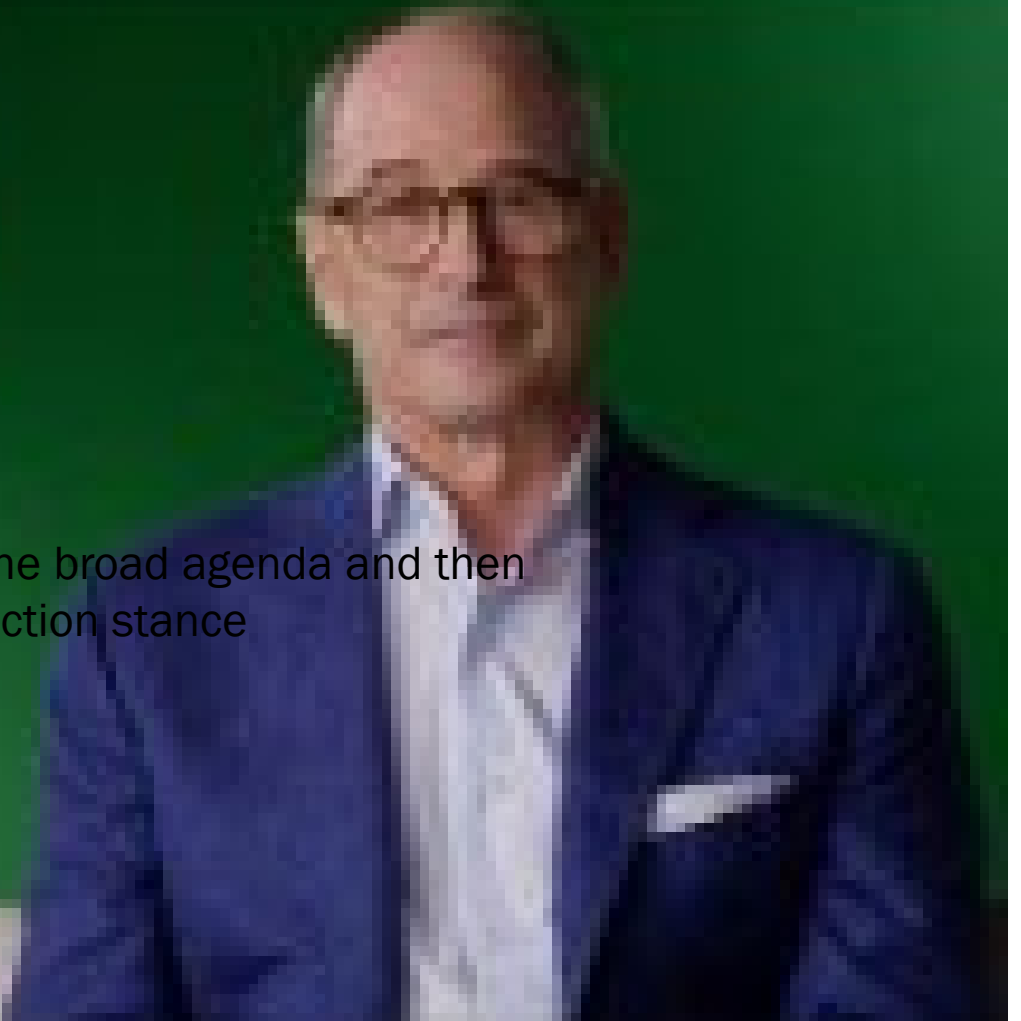
Too much focus on planning may lead to losing sight of strategy



QUICK STUDY: A Plan Is Not a Strategy

- Initial emphasis on the broad agenda and then to a more selective action stance

Harvard
Business
Review



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Strategic Planning Basics

Strategic planning isn't a single thing – it consists of varying concepts, practices, and tools that combine in different ways to create a variety of approaches to shaping and guiding who an organization is, what it does, where its going, and why

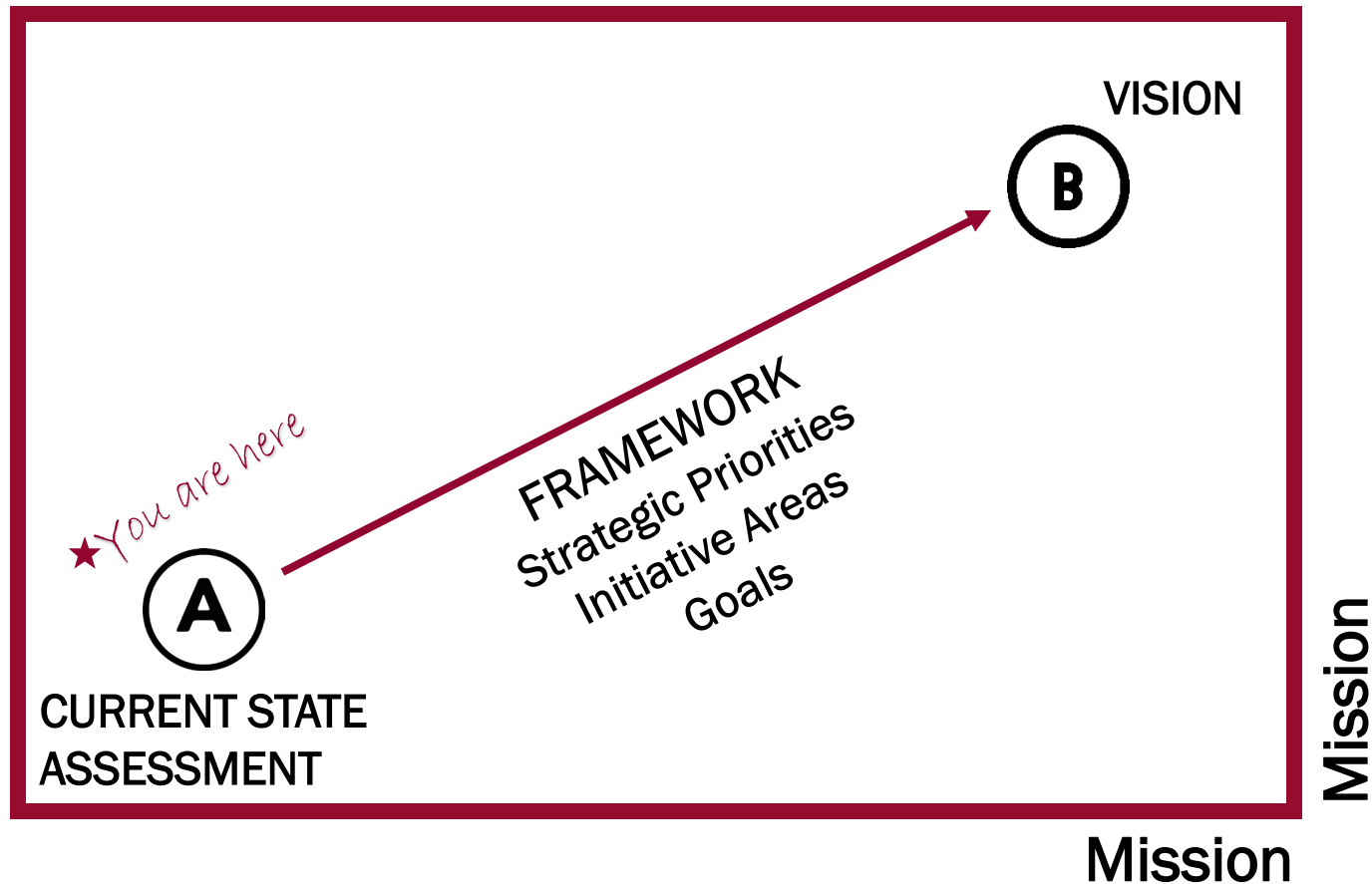
Central Components to any strategic planning or strategy development effort:

- ✓ **Mission:** Why do we exist? What is our ultimate purpose?
- ✓ **Vision:** Where are we going and what do we aspire to?
- ✓ **Values or Guiding Principles:** Who are we together? What are our cultural agreements? *How* will we get there?
- ✓ **Framework:** *Cascading* strategic priorities (1), initiative areas (2), goals (3)





How do strategic planning components work together?



Foundations of effective strategy development and strategic planning

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- ▶ Strong, intentional, empowering leadership focused on the big picture
 - ▶ The assembly of a cross-organizational SP team with a systems focus and knowledge of the organization and its mandate, staff, finances, and operations
 - ▶ A clear, developed process to organize the effort – but not so tight it strangles the effort
 - ▶ Clear communication with your team and stakeholders at the outset of the process
 - ▶ The ability to realign existing resources (if necessary) and cultivate new ones to fully support the plan
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- ▶ A clear understanding of the motivation for the effort
 - ▶ Holding your current model of what you do and how you do it lightly. What you do and how you do it is a choice. Alternatives always exist - if you're open to them
 - ▶ The courage to accept uncertainty and to drop the need to have all the information you want
 - ▶ Encouragement and protection of dissenting and contrary voices in the effort. Conformity and complacency often results in lackluster strategy



Current State Assessment

Landscape Analysis

Environmental Scan

The act of reflecting on your reality *before* figuring out how to address it results in more strategic, relevant, and robust solutions. This sets the stage for successful strategy development and strategic planning, informing us of what is going on inside and outside of the organization (for better and for worse)

Commonly use tools include: SWOT (or similar), industry analysis, benchmarking, organizational assessment data, all which tell us things about:

- **Trends:** What trends could affect the organization positively or negatively?
- **Competition:** Who are our competitors and what is providing them an advantage?
- **Technology:** What developments in technology may impact us?
- **Customers:** How is our customer base changing and how are we serving them?
- **Economy:** What is happening economically that could affect us?
- **Labor:** What is the labor market like and what staffing issues are being experienced?
- **Political:** What impact will election or legislative outcomes have?



Let's use metaphor to connect with the challenges, strengths and needs of your organization. This "right brain" intuitive exercise can bring in additional information along with the harder data that you have about the functioning of your organization.

If your organization were a creature (real or imaginary), what would it look like?



- 1. How does this creature move, operate, and function?**
- 2. How is this creature healthy and thriving?**
- 3. What are this creature's needs and challenges?**



Stakeholder Participation

Research shows that stakeholder participation (internal and external) in strategy development processes generates more beneficial outcomes than just involving top leaders/managers in the process.

Though the involvement of stakeholders ramifies the process, it is hard to imagine a successful non-participative strategy development process within a higher education environment. *Our academic culture demands a say.*


This does not mean that all potential stakeholders should be involved either. Those leading processes should deeply consider who to involve, why they are being involved, as well as how and when they will be involved

- ▶ Leaders, staff, partners, stakeholders are not all equal
- ▶ Start of process (individual interviews, group ideation session, survey)
- ▶ Near end of process (individual interviews, group feedback session, survey)



IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

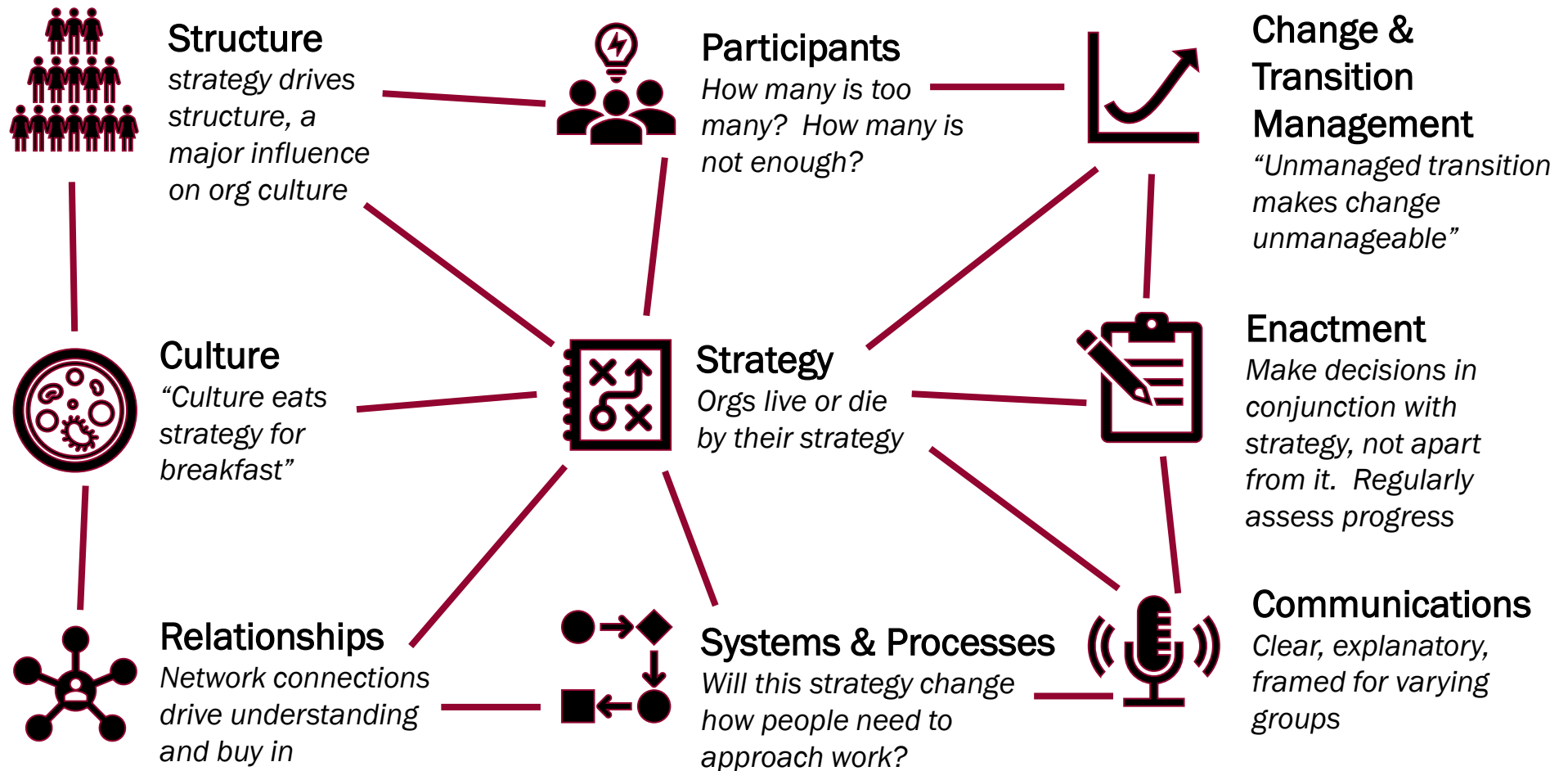
INCREASING IMPACT ON THE DECISION 

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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A constellation of factors

that can support or derail strategy development and implementation



On Implementation & Execution

There will always be a gap between where the organization is and what new strategies call for. Closing that gap is **implementation**

- Implementing strategy consists of all the decisions and activities required to turn the strategy into reality
- To remain relevant, strategies should be seen in a constant state of evolution because our world is in a constant state of flux.

Execution amounts to the decisions made and activities undertaken to turn the implemented strategy into results.

- This includes setting goals, establishing timelines, creating motivational incentives
- Solid execution requires regularized check-ins with varying teams and individuals responsible for measures/results

If you are experiencing issues in implementation or execution, remember:

STRATEGY IS A LIVING THING

and it must be tweaked, pruned, honed, and refined to remain relevant



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