STRATEGY:
Clarifying, Building, Implementing, and Ensuring Alignment

Laree Kiely, Ph.D.

The Kiely Group

laree@kielygroup.com

Today's Learning Objectives

Overall: Know how to construct a solid yet adaptable strategy for your organization or your segment of the organization

I.   **Discover your strategic intent**

II. **Construct your strategy**

III. **Build in strategic agility**

IV. **Understand how all other organizational elements and processes fit within the context of "strategy"**

V.   **Determine how to take these concepts back to your environment to make a positive difference**

Strategic Plans and Performance Measures come later

The future is not some place we are going to, but one we are creating. The paths are not to be found, but made, and the activity of making them, changes both the maker and the destination.

--John Schaar--

What do we mean by "Strategy"

Where did we get the idea of "Strategy"?

- Military

- Game theory

- The purpose is always to "win"!!
  - Watch out for the "zero-sum game" mentality
  - How do you define success?
  - How will you know when you are there?

What is Strategy…

…a way of thinking, <deciding, and doing>, not a
procedural exercise of a set of frameworks.

- Bradley, et al McQ

What is Strategy:

- Past: "…a repeated pattern on the road to success."   (whose intention was to arrive at success)

- Future: "…a broad framework for actions that will culminate in a win." (whose intention is to arrive at success)

  - Sloan, 2006

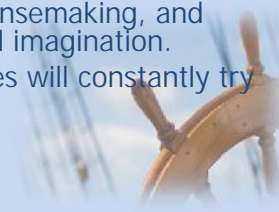**· Intentional ·**
· Actions ·

What is Strategy?

- A central, externally focused concept of how we will reach our shared goals and objectives
- Identification of an opportunity and plan for seizing it
- An integrated set of choices that are aimed at delivering sustainable and successful outcomes

Strategy:

- Starts with a shared purpose; the reason why you exist
  - Agreed upon and clearly understood at the fifth level of "why"
- Becomes a shared destination; A declaration of intent defining where you want to be in the long-term and how to get there.
- Becomes a set of choices on how to get there
  - Strategy maps out the future by determining what products and services you will offer and to which constituents
- Setting a large-scale, over-arching goal, then making choices that align with that goal, then setting a plan of action to achieve that goal.
  - Innumerable decision points along the way
  - Not what you say it's what you do
- Strategy is determined by systemic thinking, sensemaking, and trending from multiple minds, current data, and imagination.
- Very hard to stay on strategy. Day-to-day issues will constantly try to pull you off of it.

Overall Objective:

Know how to construct a solid yet adaptable strategy for your organization or your segment of the organization

I.
Discover your strategic intent

The Architecture of Strategy:
The "Why" or The Shared Destination

Why do you exist?	For whom?	How do you define success?

What is a Shared Destination?

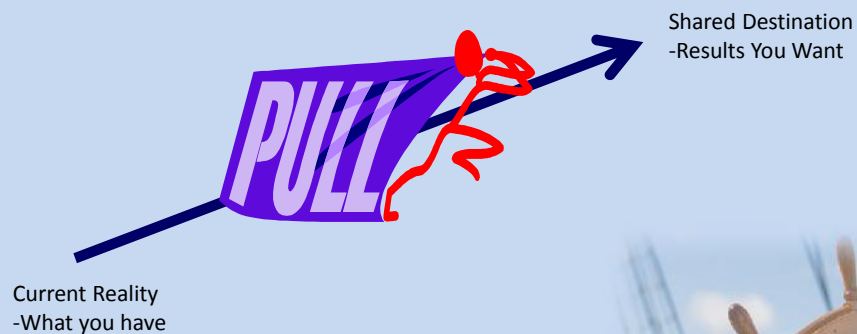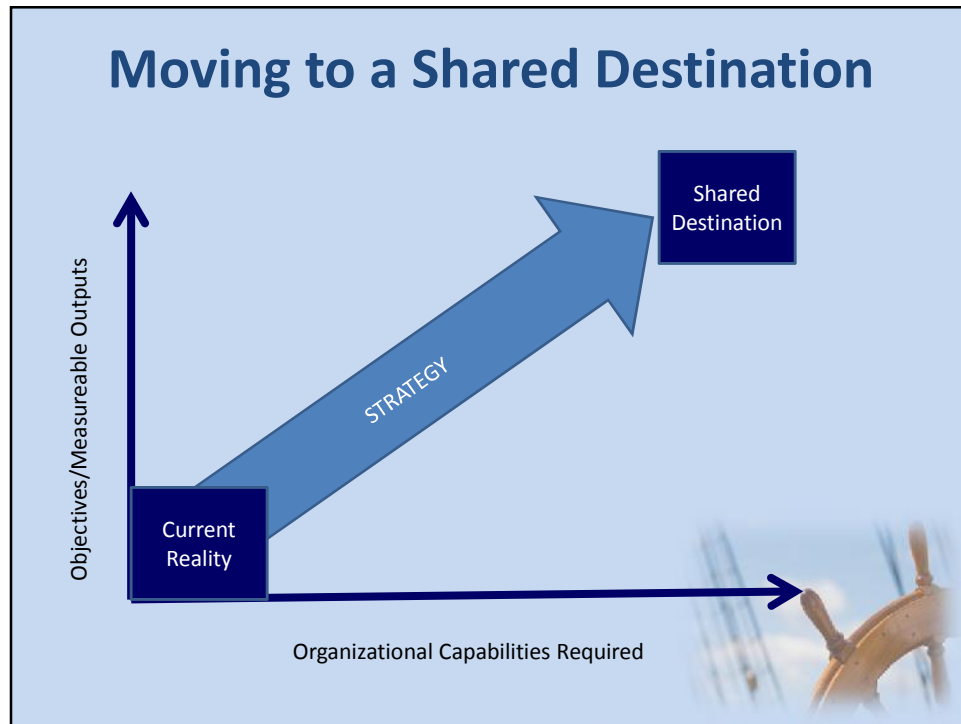**A picture of a collectively desired future state to which each member can feel a personal connection.**

"If you want to go fast, travel alone, but if you want to go far, travel together."
--African Proverb

Creative Tension

- Creative tension provides the structure to channel the energy towards a desired future

PULL

Shared Destination
-Results You Want

Current Reality
-What you have

Moving to a Shared Destination

Objectives/Measureable Outputs

Shared Destination

STRATEGY

Current Reality

Organizational Capabilities Required

A shared destination should be:

- Aspirational: a stretch
- Compelling: it matters to the organization and your constituents
- Directional: It is clear where you want to go

Shared destination describes desired results in a context that matters to the success of the organization

Criteria for Articulating a Shared Destination

- Focuses on the result, not the process
- Identifies what you want, not what you think is possible
- Identifies what you want, not what you don't want
- Is clear and specific enough so that you'd know it if you had it
- Stated in the present as if you already have it
- Actually can be shared

Four Dimensions of a Shared Vision

Organization Results	Consumer
• Financial metrics • Marketplace position	• Products or deliverables • Value/Satisfaction
Operational Excellence	Organization Culture
• Efficiency/cost • Synergy	• Relationships or interactions • Collaboration quality

II.
Construct your strategy

Organizational Capability - Definition

Organizational Capability

Divisional Capabilities

People Capabilities

What an organization **must be able to do** to achieve the performance necessary to successfully execute its strategy and deliver the reason for which it exists

Organization's Capabilities

People

Process

Differentiator

Technology

Culture

Enable the Organization

What will it take to accomplish this?
- Tangible Resources:
  - People
  - Time
  - Money
  - Other
- Intangible Resources
  - Credibility
  - Attitude
  - Buy-in
  - Participation
  - Other

Organizational Capability

•What people are needed?
•What competencies are needed?
•Do we have the right numbers of people with these attributes?
•What knowledge is needed by our people

•What technology and/or science is critical to develop to be able to…?

People and knowledge	Technology and Science
Systems and Processes	Culture and Behavior

We must be able to…

•What systems or processes must be built or realigned to ensure that we can…?

•What kind of culture and behaviors will support this capability?

Staging Capabilities Over Time

Measureable Milestones

Shared Destination

STRATEGY

Current Reality

Organizational Capabilities

III.
Build in strategic agility

21st Century Scenario Planning

IV.
Understand how all other organizational elements and processes fit within the context of your "strategy"

Ensuring strategic thinking and alignment to strategy from everyone

Having a strategy enables us to ensure that
day-to-day decisions (individual and group--
no matter how small) fit into the long-term
survival and thriving of our organization.

"It has been estimated that most human beings make as many
as 50,000 decisions in the course of an average day."
Nadler and Hibino

**What does it mean if a large portion
of time is being spent on things that
do not add up to your strategy?**

• You are not being honest about your strategy

• You should stop doing these things

• You should change your strategy

Decision Points

- How does this choice/behavior solve for your articulated strategy?

- If it is an exception, can you defend it within the overall strategy?

Frame Everything Within The Context Of Your Organization's Purpose And Strategy

- Always know your organization's intended purpose and strategy at least 3-5 years out
- Always know exactly where and how your individual contributions fit into achieving that strategy

Remember:

Even if it is an internal opportunity or challenge, it should directly align to how we can better serve the constituents

Ensure Innovation

- Value and set the context for creativity
- Test your new ideas most quickly and effectively
- Ensure alignment with stated strategy
- Know what to do if the new ideas are GREAT, but they don't align with the strategy

V.
Determine how to take these concepts back to your environment to make a positive difference

UpLeveling the Question

- Continually ask: "What are we solving for?" (issue, question, problem)
- Continually ask: "Who are we solving for?" (immediate, intermediate, ultimate constituents)
- Continually ask: "Are we sure this is the "right" problem for us to be solving?
- Become a "Why" culture
- Use the "Five Levels of Why" tool

Four Dimensions of a Shared Vision

Organization Results

Consumer

Operational Excellence

Organization Culture

Organizational Capability

People and knowledge

Technology and Science

We must be able to…

Systems and Processes

Culture and Behavior

Being Ready

Scenario :

TIMID	MID-RANGE	BOLD

CONCEPT: READINESS

The '8' Elements:

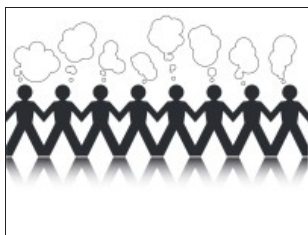|	
~Allow Emergent Processes	Co-Cre8
~Ensure Mental Discipline	Contempl8
~Enlist Your Creativity	Innov8
~Judge Critically	Investig8
~Influence Ethically	Communic8
~Implement Effectively	Activ8
~Measure Objectively	Evalu8
~Network Intentionally	Affili8

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TOOL: CO-CRE8 – THE 5 LEVELS OF "WHY"

1) Ask "why" 3 to 5 times to get to the core issue or double-click on one of their words.

2) Use their words to gather more meaning.

3) When they start to struggle with the answer, you are close to the core.

4) Practice SILENCE – Let them think.

5) If you go down the wrong path, back up and start down another.

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Short on Time or People? Ironically, You Could Try a 'Sacrifice Session'

Of all the commodities we want or need in our organizations, the only one that is finite is time. You can get more money, more power, more impact, more love, more influence, more friends, etc. etc. You really can. Even money–global governments just print more! But you cannot add an hour to your day or a day to your week. Seven days and 24 hours are all we get. It's funny, though–have you noticed that we act as if things were the other way around. We struggle for more of the "non-scarce" by wasting the scarce. So, in this column, let's take a realistic look at time.

Another somewhat erroneous belief we have is around needing more people, more human resources. If we could just get more folks, we could do a much better job. Although in principle that's true, it is also true that more people take more time. A different approach might be to better leverage the time of the folks we already have.

We call this process a "sacrifice session." Please don't look this up on the Internet; you'll have some very strange things show up! I'll describe it here for you so you won't be subjected to that. It's a very simple process. You can do this in a 2-hour group session or with your folks individually over time. First, have everyone think of 2-3 things that they are currently doing that they are going to sacrifice; that they are going to quit doing. These activities have to be the ones that your folks believe no longer contribute any real value toward achieving your organization's desired purpose.

Typically, of course, people will come in with a list of activities they don't like to do. That's partially okay, but it doesn't actually meet the requirements of a "sacrifice." A sacrifice is giving up something we like. If you grew up with Catholic roots like me, you might have first understood "sacrifice" when you were a kid around the time of the year called Lent. For my first Lent, my mom asked me what I was giving up and I said "raisins." My mother replied: "You don't like raisins." "I know that's why I am giving them up." "No," she explained, "you have to give up something you like, so it feels like a sacrifice. This year you are giving up bubble gum."

When we run these sessions, we ask everyone to bring one "bubble gum" for every "raisin." Be careful here, you don't want to give up everything that's fun and that keeps engagement high. This process is meant to look at time intentionally and strategically, not to strip out all incentives or rewards. It's supposed to be meaningful, not draconian. That's why we let the folks come with their own lists.

The next step is to see if you can really give up this sacrificed activity. The "sacrificers" have to vet their idea with anyone else who might be involved. A simple question will usually get you there. "Do you still need me to do this and if so, why?" You might get an "I don't know" or "I think it's because…." If so, keep asking other people until you get to the real reason for the activity. Don't assume it needs to be done. We have seen examples of reports and time-consuming processes that people have been doing forever and have never asked if they were relevant. They just kept doing the work. One great example was a fellow who spent two hours a week gathering and inputting data then sending it to a colleague who spent an hour a week checking and reconfiguring it then sent it to a third colleague who printed it out put it in a file drawer taking about 30 minutes a week. That was as far as the work ever went. They later found out that it was an old government-required process that had been changed and delegated to a different department. No one told them to quit. That's one of the ways to define a bureaucracy: an organization that has taken on many new things to do but never got rid of any of the old.

So that was a raisin example. Here's a bubblegum: One group we knew had an on-going "outreach" committee of 10 people who met for four hours a month over a long lunch to discuss funding projects for young people in the community. They prepared presentations, discussed demographic changes and the state of things today: how much need there was and where they thought the trends were going. They had lunch, enjoyed each other's company, shared their findings about need and reported on the amount of money in their budget and where it was being sent. They didn't get any feedback from the places where the money went; they just discussed how great it was to send the money. That's 40 hours of resource time a month!! But don't get me started on the wastefulness of meetings….

Much of this extravagant wastefulness is caused by old habits that we haven't questioned in a long time. You probably know the stories about keeping old behaviors when the original reasons are long gone. Here's some history to remind you to keep asking the "why." I am, right this moment, typing on a computer keyboard that is a classic example of the danger of rigid old habits that are missing the reasons behind them. It's called the QWERTY keyboard because of the top row of letters. It is not ergonomic at all, but no matter how hard people have tried to create a faster and more user friendly keyboard, we are pretty much stuck with this one. Do you know where it came from? In the early days of manual typewriters, typing too fast caused the keys to fly up and get tangled up in a big mess. You would have to stop, reach up and untangle the keys, then you would have to scrub your hands because they ended up full of ink. The QWERTY keyboard was designed to slow you down so this wouldn't happen. And now, even though there are no "keys" at all, we are stuck with a keyboard that was designed to slow us down! In fact we still call it a "key" board!

What are the old habits in your organization? Where is the waste? It's as satisfying and therapeutic as cleaning out your garage or your pantry and takes a lot less time. In our experience, people know where the wasted time is as soon as they are asked to think about it. In most cases, when they ask others involved, they usually recognize the waste as well and agree with the sacrifice.

Here's the really good news. It is easy to calculate how much time is being saved. Simply ask folks to add up the number of hours they and others are spending on the activity. Groups of 25 to 30 people, on average, end up finding the equivalent of five to seven FULL TIME resources.

It's worth a try. If you run into any problems, let us know. Just do me a favor, don't look up "sacrifice session" on the Internet!!

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*Author: **Laree Kiely**, Ph.D., President, the Kiely Group. Dr Kiely served on the faculty at USC for over 15 years. In addition to currently leading the Kiely Group, she serves as faculty for leadership programs at Duke CE, UCLA, USC, Thunderbird, and Ivey (Toronto). The Kiely Group specializes in Leadership and Organizational Impact. Please send your comments, questions, and stories to us at: info@kielygroup.com*