

So, You Want to Become Strategic? A Brief Primer for Managers

By Amiel Handelsman

September 2005

The Creative Challenge

The call for managers to become strategic is nothing new. Companies and consultants have been talking about this for decades. And countless leadership assessment instruments list “strategy-minded” and “strategic leader” as core competencies. One would think that by now we’d have learned how to make managers more strategic. And some companies have. But many others, including top brands respected in their industry, have not.

“We tell our managers to be strategic,” I often hear, “but they either don’t want to do this or don’t know how. And we’re not sure what to say. What can we do?”

A good place to start is with our understanding of strategy as a discipline and strategic leadership as a competence. This creative challenge has at least three elements:

1. **Strategy is more complex and interesting than we think.** My favorite description of the discipline comes from Henry Mintzberg, the great Canadian management thinker. He suggests that strategic thinking involves seven forms of seeing¹:
 - Seeing Ahead: into the future
 - Seeing Behind: to get rooted in the past
 - Seeing Above: for a view of the “big picture”
 - Seeing Below: for a grounded view of the messy digging
 - Seeing Beside: creative thinking to pick out precious gems that others miss
 - Seeing Beyond: inventing a future that otherwise would not be
 - Seeing It Through: actually getting things done

Being strategic means the capacity to see in all seven ways.

2. **Most managers are strategy novices—but not completely.** Few managers are completely blind to strategy. In my experience a vast majority are able to see one or two dimensions yet not the others. For example, people rising through the ranks can be adept at seeing below, seeing it through and even seeing beside. What’s missing? The capacities to see ahead, behind, above and beyond. Young

¹ Drawn from *Strategy Safari*, Mintzberg’s lively and comprehensive overview of what he calls the ten schools of strategy

managers often neither find these in their job descriptions nor receive rewards for using them. Indeed, being too strategic can feel like a political handicap; it means you are usurping your boss's direction or disobeying higher corporate directives.

Ironically, the individuals hired as strategic planners at many companies face the exact opposite situation. They are trained and rewarded to see ahead and above—and that's about it. Seeing the messy muck below (which everyone else inhabits) feels at best like a necessary chore (needed to gain buy-in) and rarely like an essential dimension of strategy.² Is it any wonder that line managers and strategic planners often consider each other alien species?

3. **Becoming a strategic leader involves developmental stages.** This is perhaps the most important and least recognized point. We fool ourselves when we think of strategic leadership as something that managers can learn from taking a workshop, reading a book, or any other short-term activity. The capacity for strategic seeing as described by Mintzberg and embodied in the best leaders involves high order cognitive complexity. It is a developmental stage. All of us have access to it, but we have to develop through a series of stages to get there. And some of us have a longer path than others. According to research by Bill Torbert³ and Susann Cook-Greuter, most managers are two or three stages away from being true strategists. In addition, it takes at least two years to complete each stage. This is for managers on a conscious path; a haphazard approach takes even longer. Asking most managers to become strategic within a few months is like asking people less than six feet tall to dunk a basketball. It's just not going to happen. The good news is that whereas adults stop growing physically after a certain age, they can continue developing cognitively (and emotionally). It simply takes more time than we typically assume. Thus we come to the million-dollar question: how does a person actually become more strategic?

Five Ways to Become Strategic

1. **Make a public commitment.** Declarations are speech acts that allow us to invent the future. One powerful declaration you can make with trusted colleagues and friends, and even in larger public settings, is that "I am committed to becoming more strategic." Another is "Our division is committed to acting more strategically over the next six months." Speaking these words is a way of taking a stand for the future you intend to create. It energizes you and signals to others that you are up to something important.
2. **Exercise your strategy muscles through a challenging project.** One way athletes achieve excellence is through actual competition, whether it is 18 holes of golf, 3

² For the full history of how this narrow view of strategy has hurt corporate performance, see Mintzberg's earlier classic, *The Rise and Fall of Strategic Planning*.

³ See Torbert and David Rooke's article, "Seven Transformations of Leadership," in the April 2005 issue of *Harvard Business Review*

sets of tennis, or a 48-minute basketball game. The same holds true for strategists-in-training. There is no substitute for taking on a challenging assignment that calls for a strategic mindset. This could be a new project, like the action-learning component of a leadership curriculum. Or you could offer to take on new responsibilities in an existing project. Either way, I suggest viewing this assignment realistically: not as the one and only test of your strategic capacity, but as the first of many opportunities to exercise your strategy muscles.

3. **Strengthen your strategy muscles through practice.** Athletes do not achieve greatness through competition alone. They also practice. A lot. The same is true in the world of strategy. What's different is that whereas a golfer remembers the time spent on the driving range or putting green, many strategists practice unconsciously. They regularly track market trends. Or they have weekly conversations with a colleague about the mismatch between a division's product line and changing customer preferences. Or they read every issue of HBR while asking themselves, "How does this apply to our business?" All of these are practices. Yet in organizations we don't call them by this name. In fact, we don't really talk about practices at all. As a result, many opportunities to transfer skills and competence go unrecognized. The good news is that there are practices that work and are replicable. In addition to those mentioned, there are practices for designing strategic conversations, asking strategic questions, making strategic assessments, scanning the external landscape, generating new ideas, synthesizing ideas, recognizing what Mintzberg calls emergent strategies, and more. Collectively, these represent the dimensions of being a strategist just like foot stance, grip, backswing, follow through, eye focus, ball placement, and club selection represent dimensions of being a golfer. By practicing one or two of these at a time, you can steadily become more skillful.⁴
4. **Shadow a top strategist.** Spend time with someone who thinks and acts from a truly strategic mindset. To maximize the benefit to you and honor their time, I suggest contracting with them for a specific set of activities over six to twelve months. Listen to them speak. Watch them interact with others in meetings. Read what they write. Conduct private debriefs in which you ask them why they did what they did, what else they considered saying, and how they would assess others' thoughts. And interview them about their career, particularly the experiences that shaped their understanding of strategy.
5. **Overcome your immunity to change.** Every manager holds untested assumptions about who she is, what she is supposed to do, and what will happen if she tries something different. For example, some managers find it difficult to look at the big picture ("See Above") because they hold high inner standards of perfection. Their assumption goes like this: "if I start to talk about the big picture, I'll never do it well enough, so people will lose respect for me."

⁴ For more on designing practices, particularly within an executive coaching relationship, see my article with James Flaherty, "Integrating Rigor, Compassion and Creative Design: The Promise of Integral Coaching" in the Spring 2004 issue of the *International Journal of Coaching in Organizations*.

Therefore, I'd rather not do it at all." Others feel perfectly comfortable being a beginner yet don't want to stir things up with colleagues who don't like the big picture. Their assumption is that "if I bring this up, it will cause conflict with Rob and Sarah, so I'll just keep quiet." In both examples, the managers hold assumptions that are unconscious and untested. The result is an immunity to change⁵ that blocks efforts to become more strategic. How can you overcome this immunity? First recognize how it operates. Then through self-observation look for evidence that the assumption is not true in all situations. Finally, conduct a safe experiment in which you truly put the assumption to the test.

These five approaches are not steps to be taken in sequence. Instead, I suggest thinking of them as pathways to excellence that can intersect and overlap at different points in a manager's career. The direction you take now depends upon your current level of strategic competence, the opportunities and resources before you, and your own assessment of what is a good starting place. What's important is to begin.

About the Author

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⁵ For more on the concept of immunity to change and an effective way of overcoming it, see *How the Way We Talk Can Change the Way We Work* by Robert Kegan and Lisa Lahey.