"Strategic Doing": Reinventing Strategy (and Innovation) in a world turned upside down

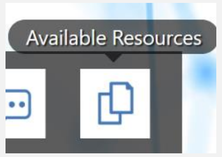
March 15, 2022 10:00 AM ET [10:00] (New York), 03:00 PM CET [15:00] (Brussels), 10:00 PM SGT [22:00] (Singapore)

© 2022 The Conference Board, Inc. | www.conferenceboard.org

Making the most of the webcast

Ask Questions
(via the Q&A box)

Download resources



Start Group ch

Share with your colleagues
(available on Demand)

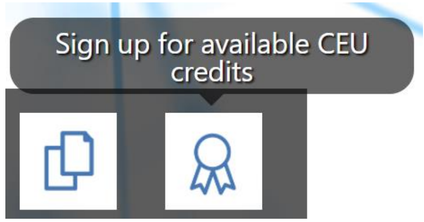
Tell us about your experience to help us improve our future program

© 2022 The Conference Board, Inc. | www.conferenceboard.org

Earn Credits

CPE (NASBA)

- ✓ Click the link in the **CEU Request Widget** to sign up for credit
- ✓ Stay online for the entire webcast
- ✓ Click ‘ok’ for 3 popups that occur during the program
- ✓ Credit available for participation in <u>live</u> webcast only



© 2022 The Conference Board, Inc. | www.conferenceboard.org

Panelists:

Ed Morrison
Director, Agile Strategy Lab
University of North Alabama
Bio

John Metselaar
(Moderator)
Co-Leader Innovation & Digital Transformation Institute
The Conference Board
Bio

© 2022 The Conference Board, Inc. | www.conferenceboard.org

Strategic Doing™
Do More Together.

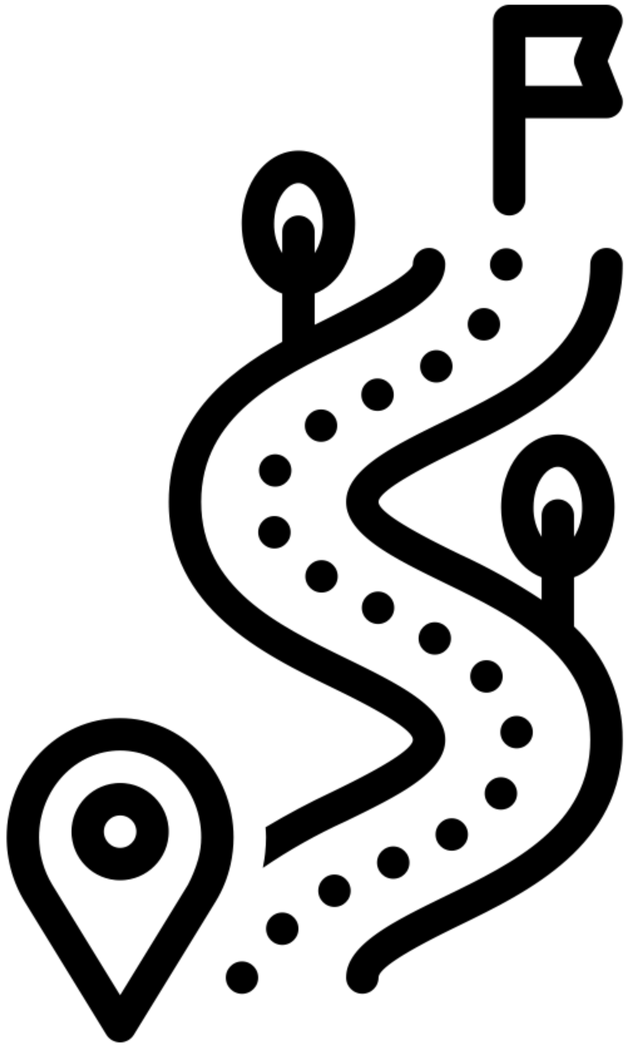
An Introduction to Strategic Doing

Ed Morrison
Agile Strategy Lab
University of North Alabama

March, 2022

College of BUSINESS and TECHNOLOGY
University of NORTH ALABAMA

This work is licensed under a Creative Commons Attribution-NoDerivatives 4.0 International License.



The Problems

Core Concepts

Strategic Doing in a Nutshell

Some Next Steps

The Problems

How do we solve wicked problems when no one can tell anyone else what to do?

How do we develop strategy in open, loosely connected networks?

How do we design and guide collaborations?

How do we build trust across organizational boundaries?

Core Concepts

S-Curves

Wicked Problems

Collaboration

Conversations

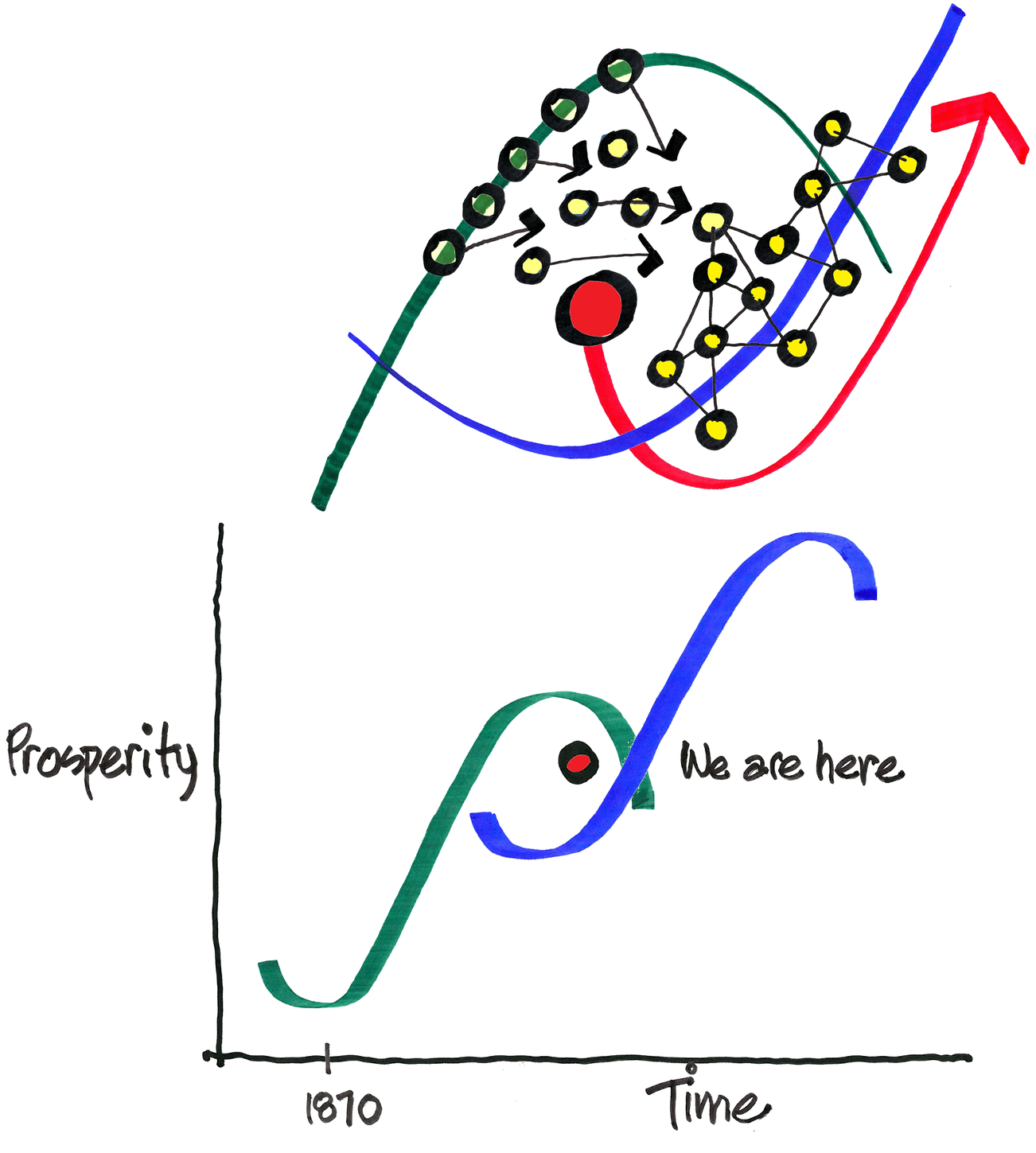
Learning

Strategy

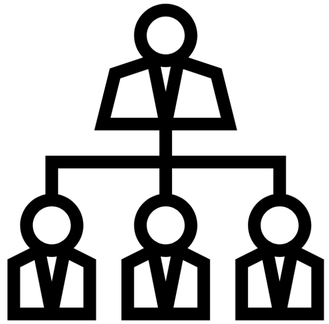
“Use S-Curves to describe the changes we are facing.”

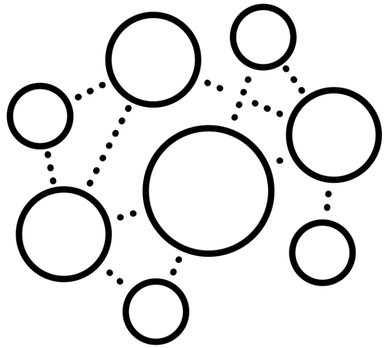
David Morgenthaler
Founder, Morgenthaler Ventures

We are moving from hierarchies toward networks



We are moving from hierarchies toward networks





1970 1980 1990 2000 2010 2020

Trade barriers lower

E-mail invented

US manufacturing begins to globalize

In Search of Excellence

Fifth Discipline

Crossing the Chasm

Netscape browser launches

Re-engineering

Good to Great

The World is Flat

Execution

Open Innovation

Design Thinking

COVID

Business Model Generation

Blue Ocean Strategy

S-Curves

Wicked Problems

Collaboration

Conversations

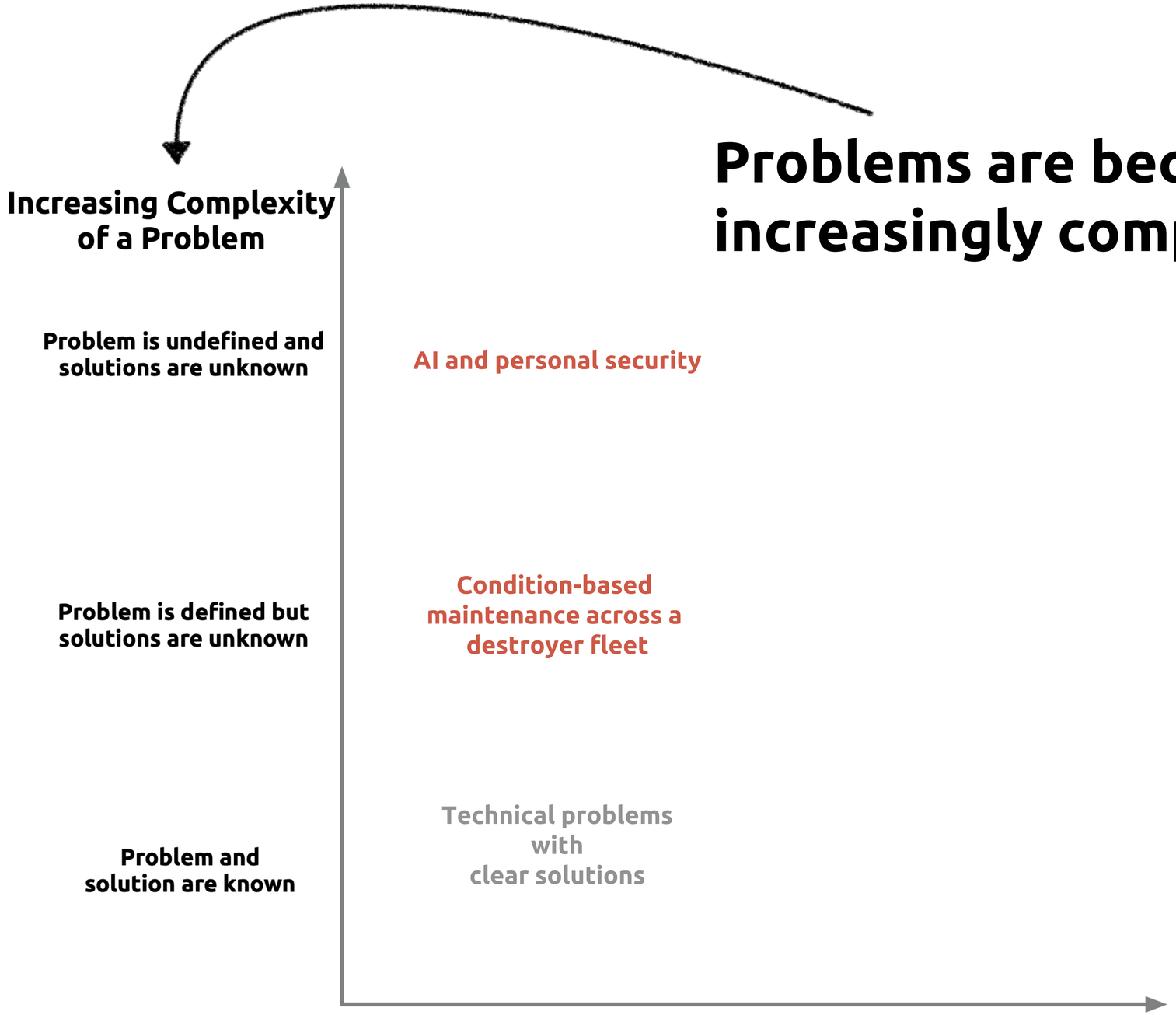
Learning

Strategy

Wicked problems require a fundamentally different approach than technical problems

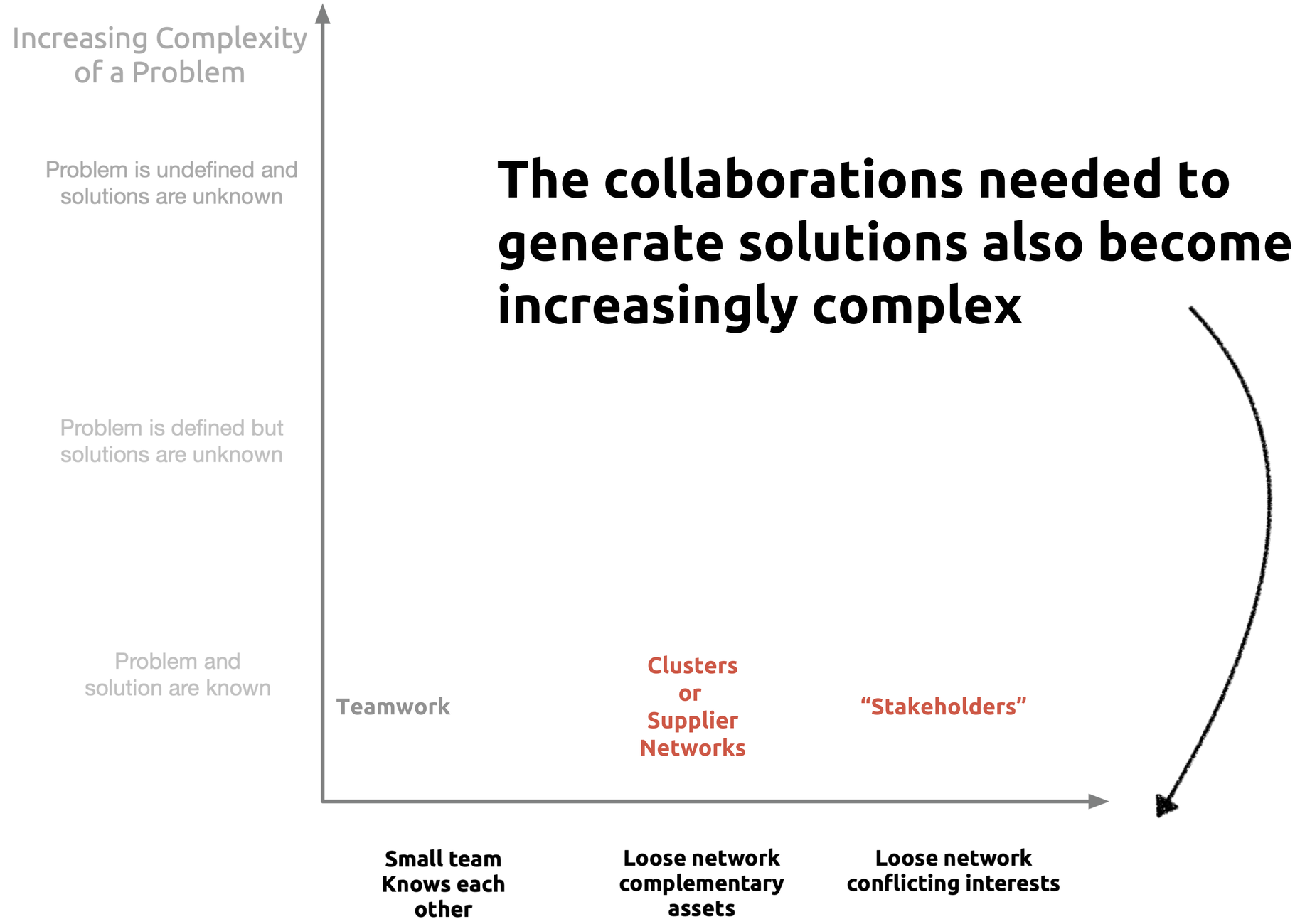
	Technical Problems	Wicked Problems
Examples	Downed Assembly Line	Digitizing Manufacturing
Solutions	Single Point Known	Multiple Unknown
Approach	Root Cause Analysis	Experimentation
Management Challenge	Team Work	Collaboration

Problems are becoming increasingly complex



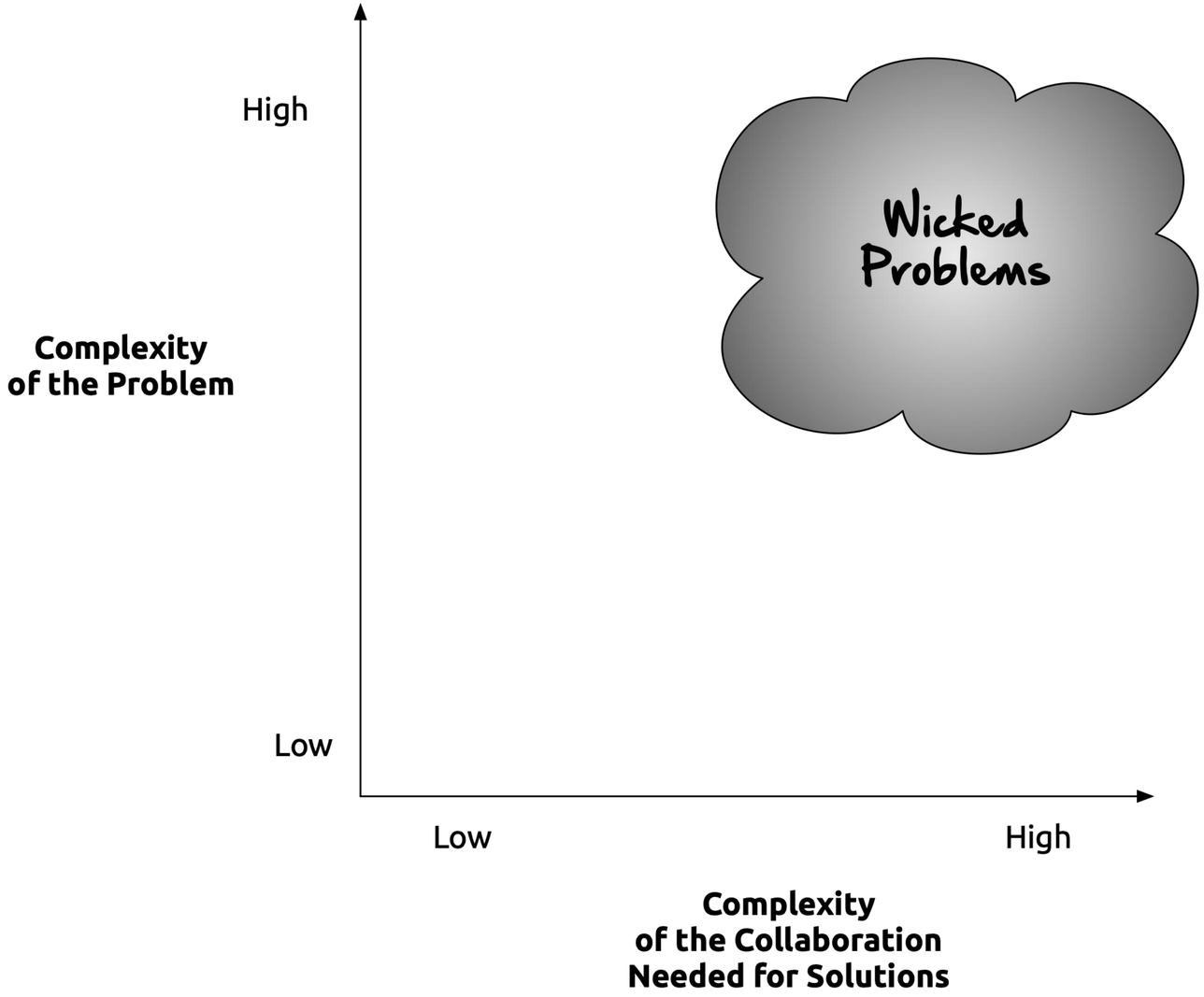
Strategic Doing™
Do More Together.

The collaborations needed to generate solutions also become increasingly complex

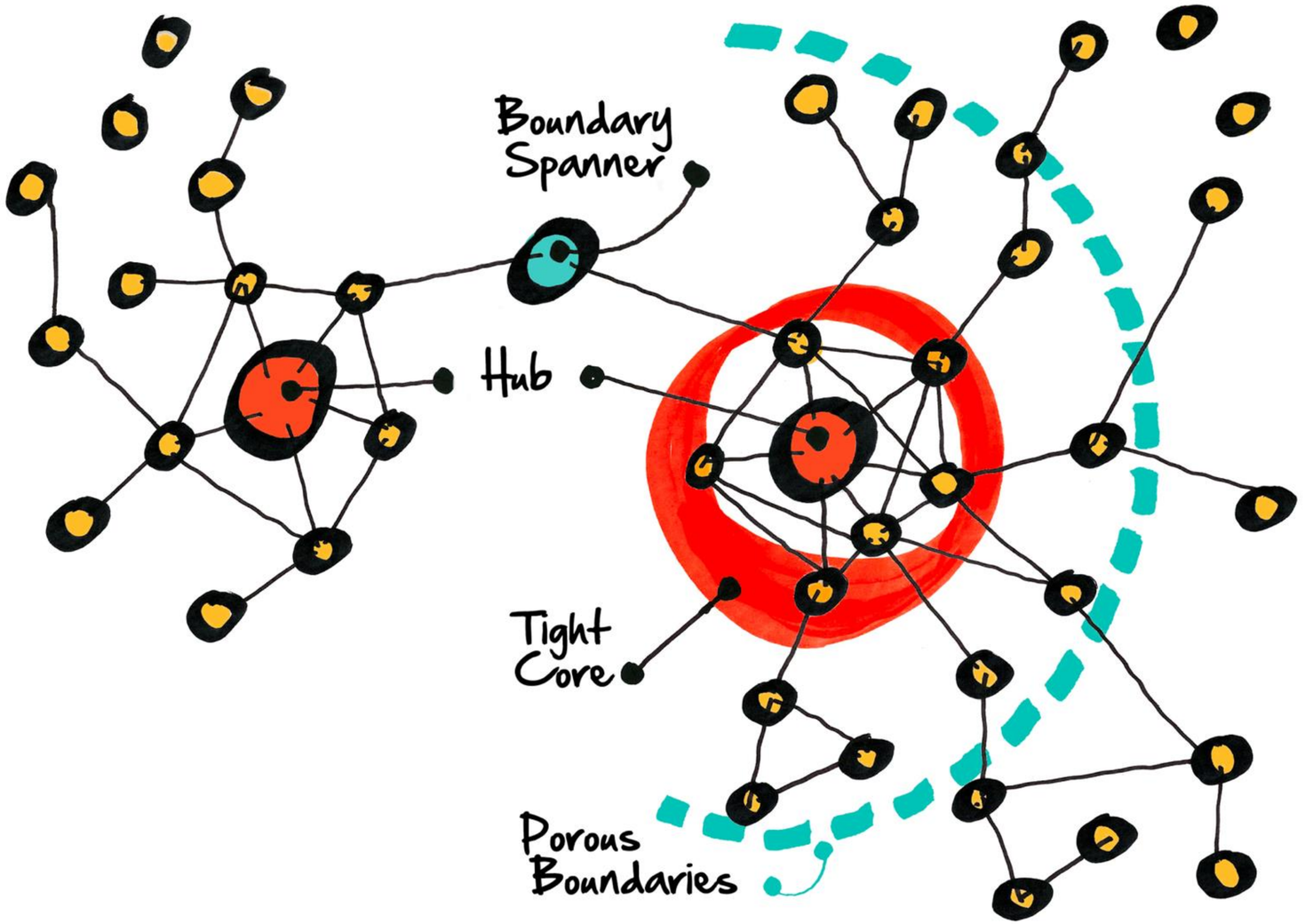


Strategic Doing™
Do More Together.

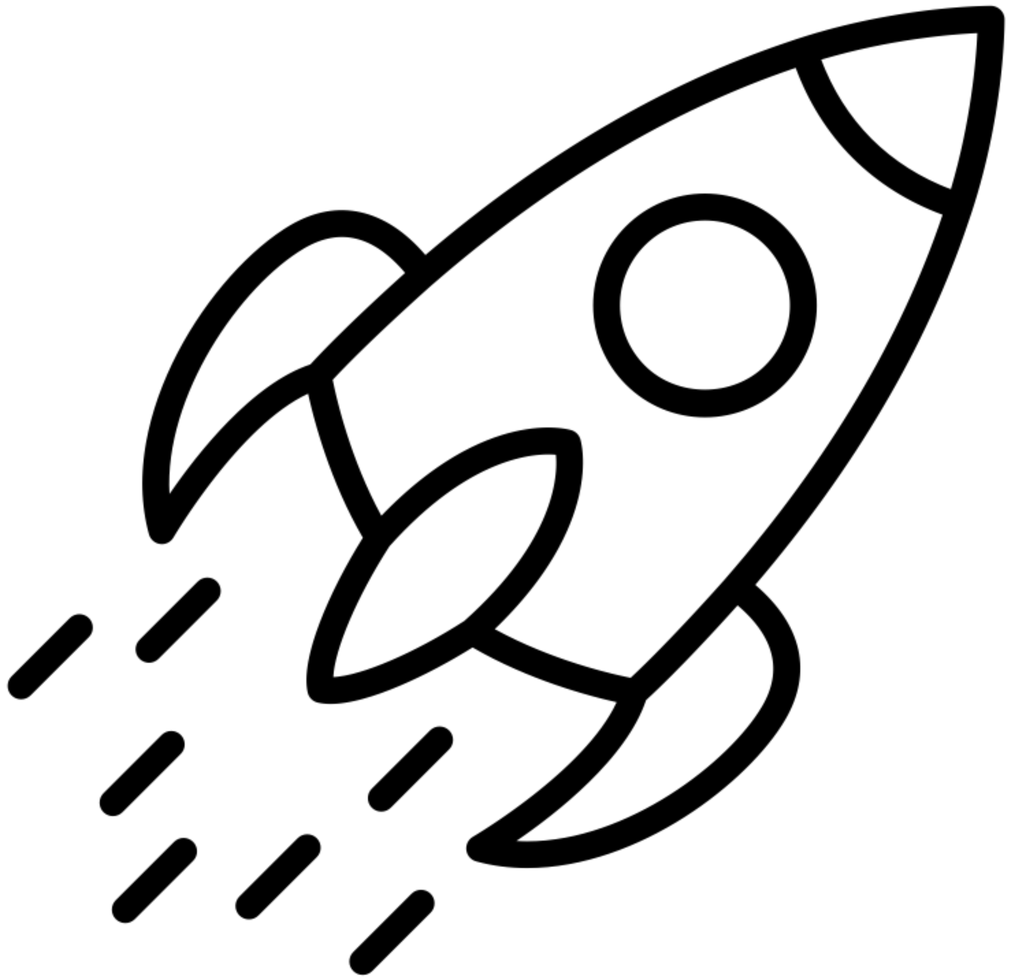
Wicked problems confront us with two dimensions of complexity



How do we generate solutions in open, loosely joined networks?

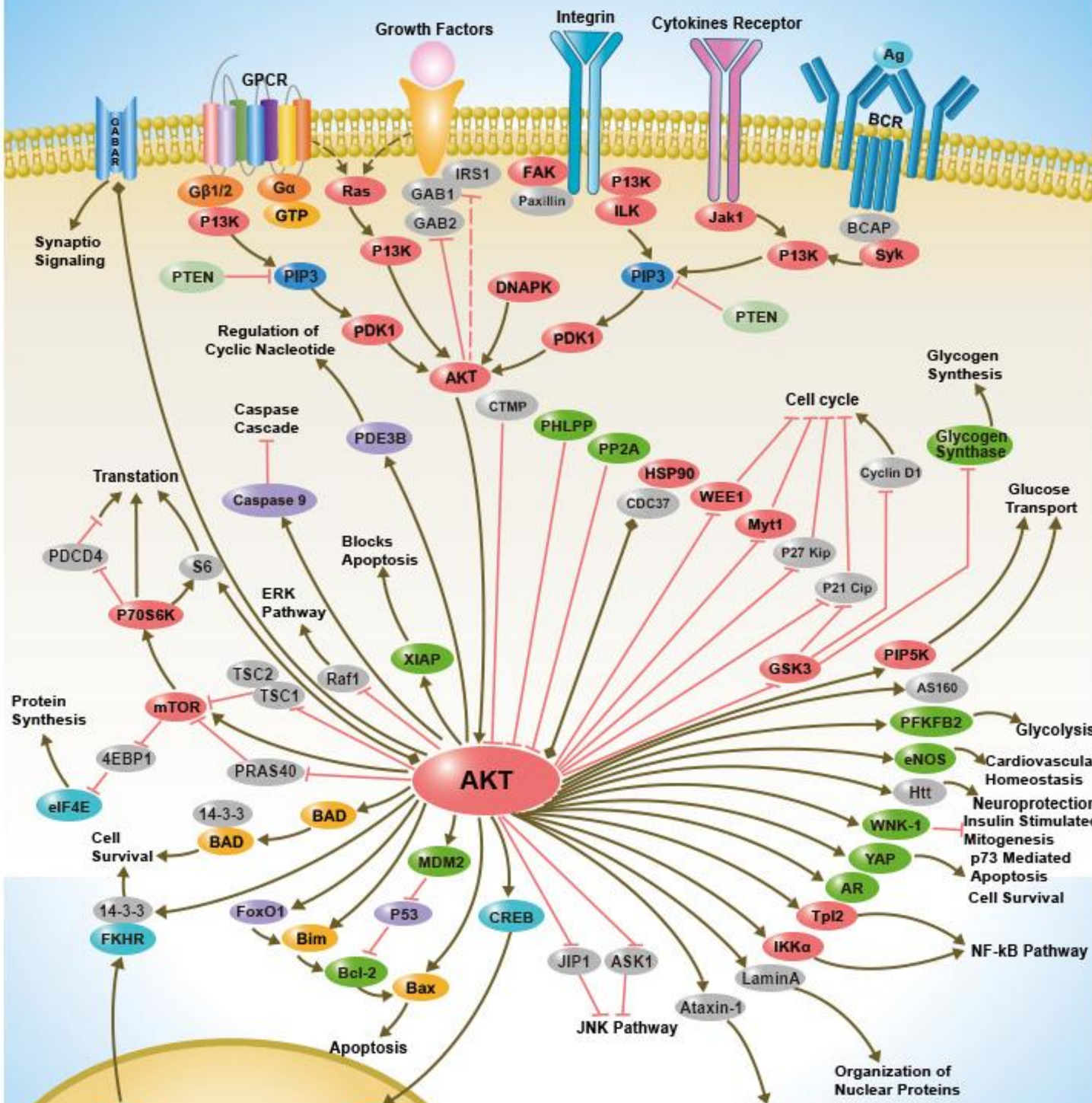


It’s not rocket science…



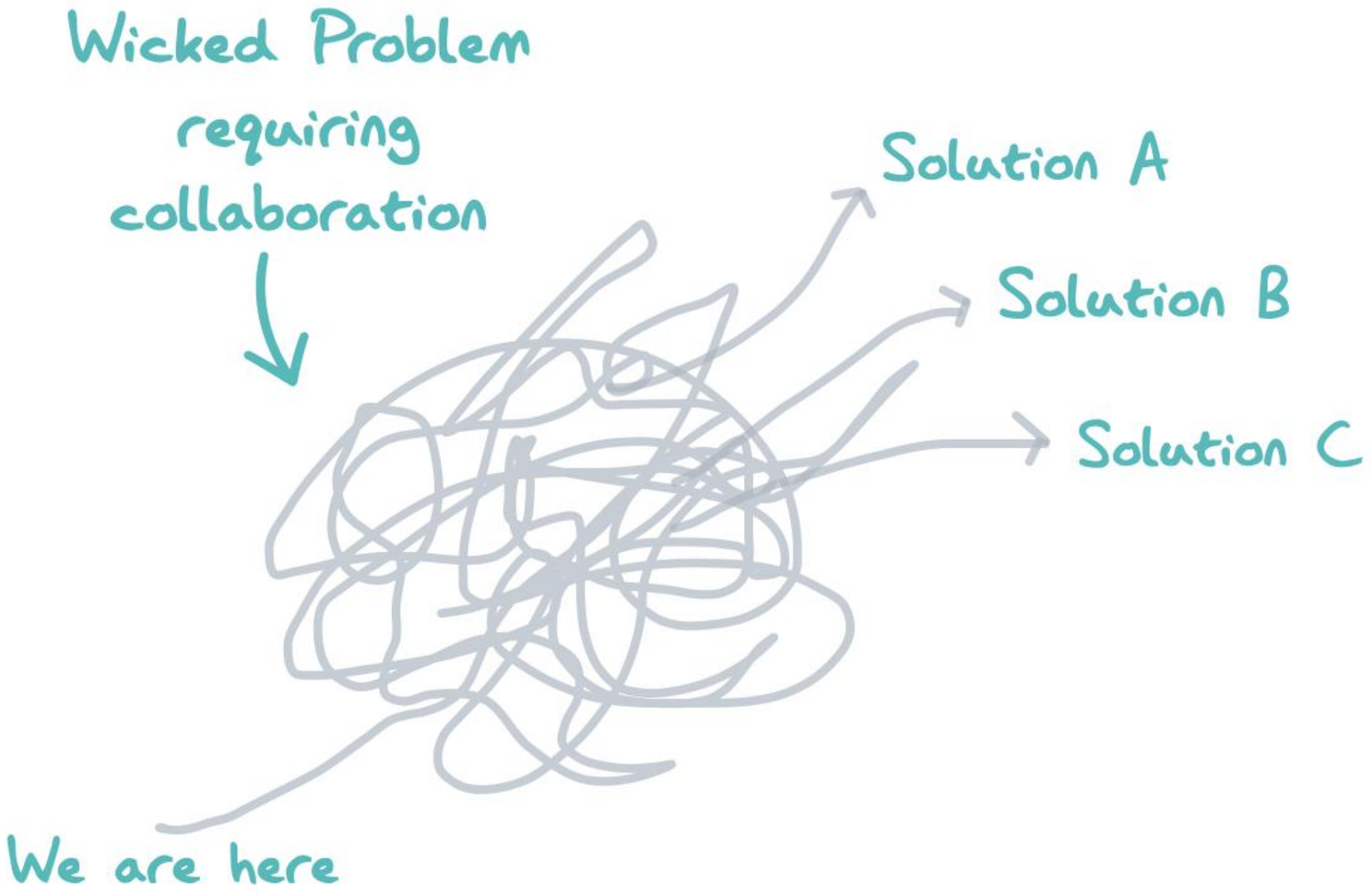
It’s harder…

It’s more like molecular biology…



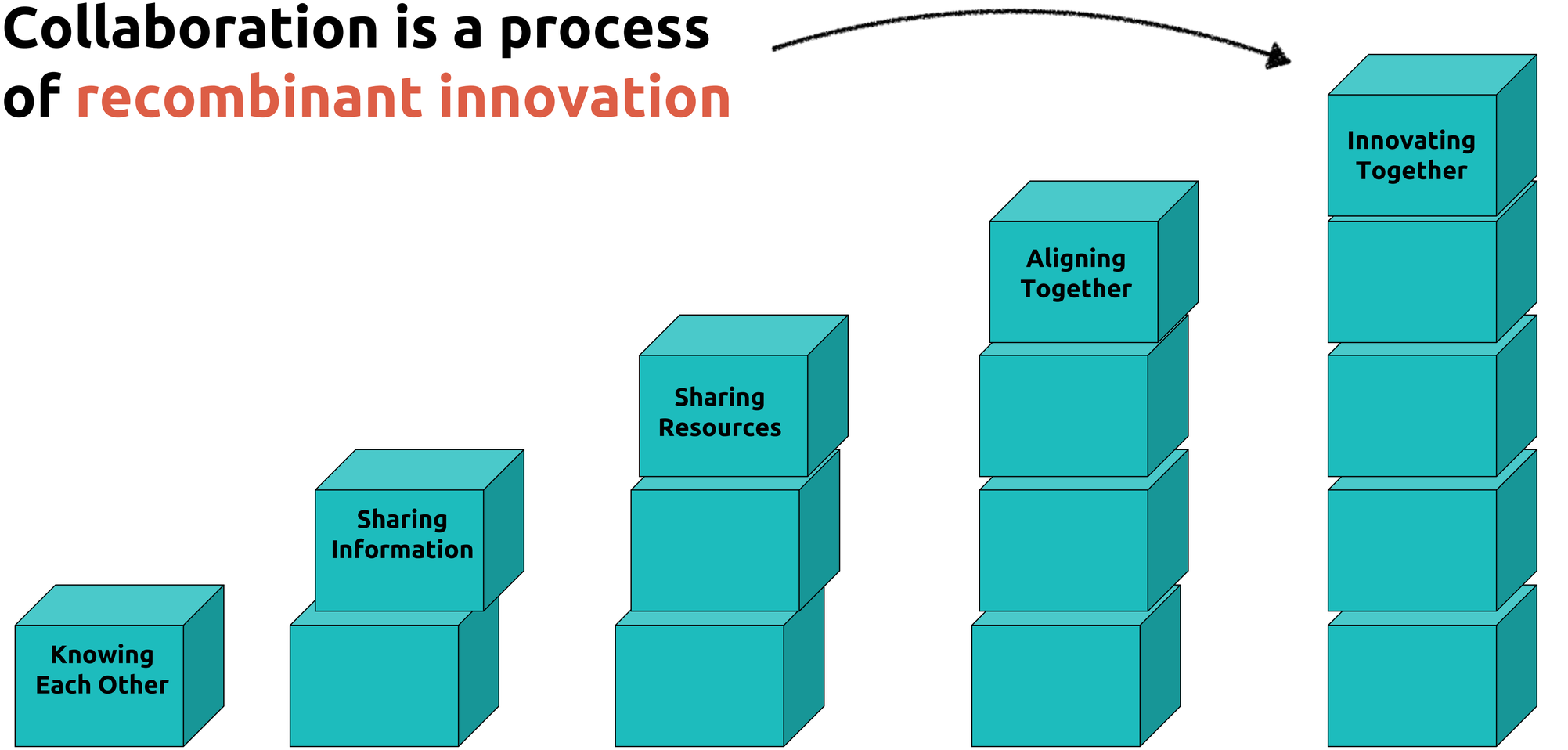
S-Curves
Wicked Problems
Collaboration
Conversations
Learning
Strategy

Collaborations generate innovative solutions to wicked problems…



Strategic Doing™
Do More Together.

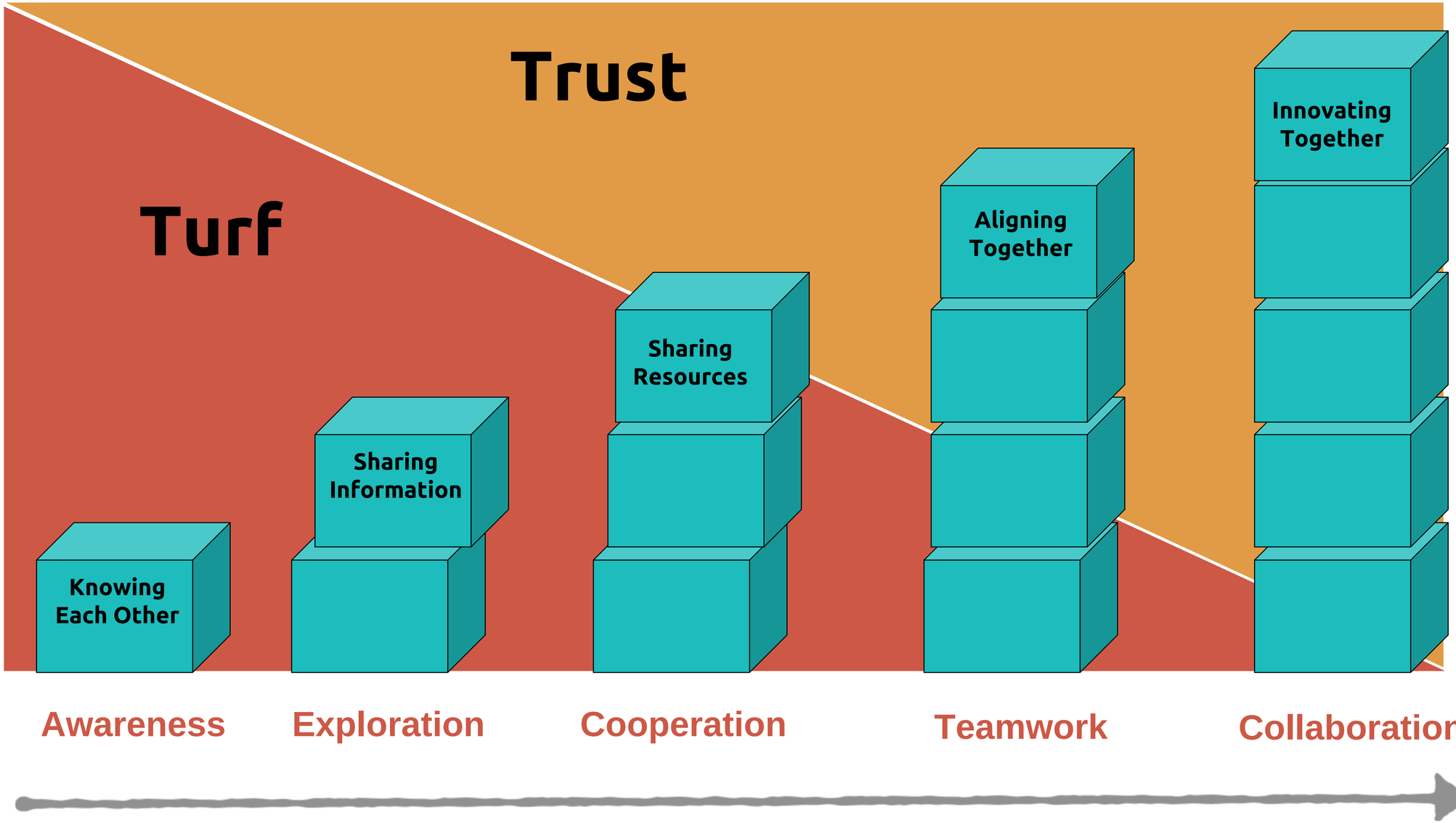
Collaboration is a process of recombinant innovation



Adapted from Collaboration Continuum from ACT for Youth

Strategic Doing™
Do More Together.

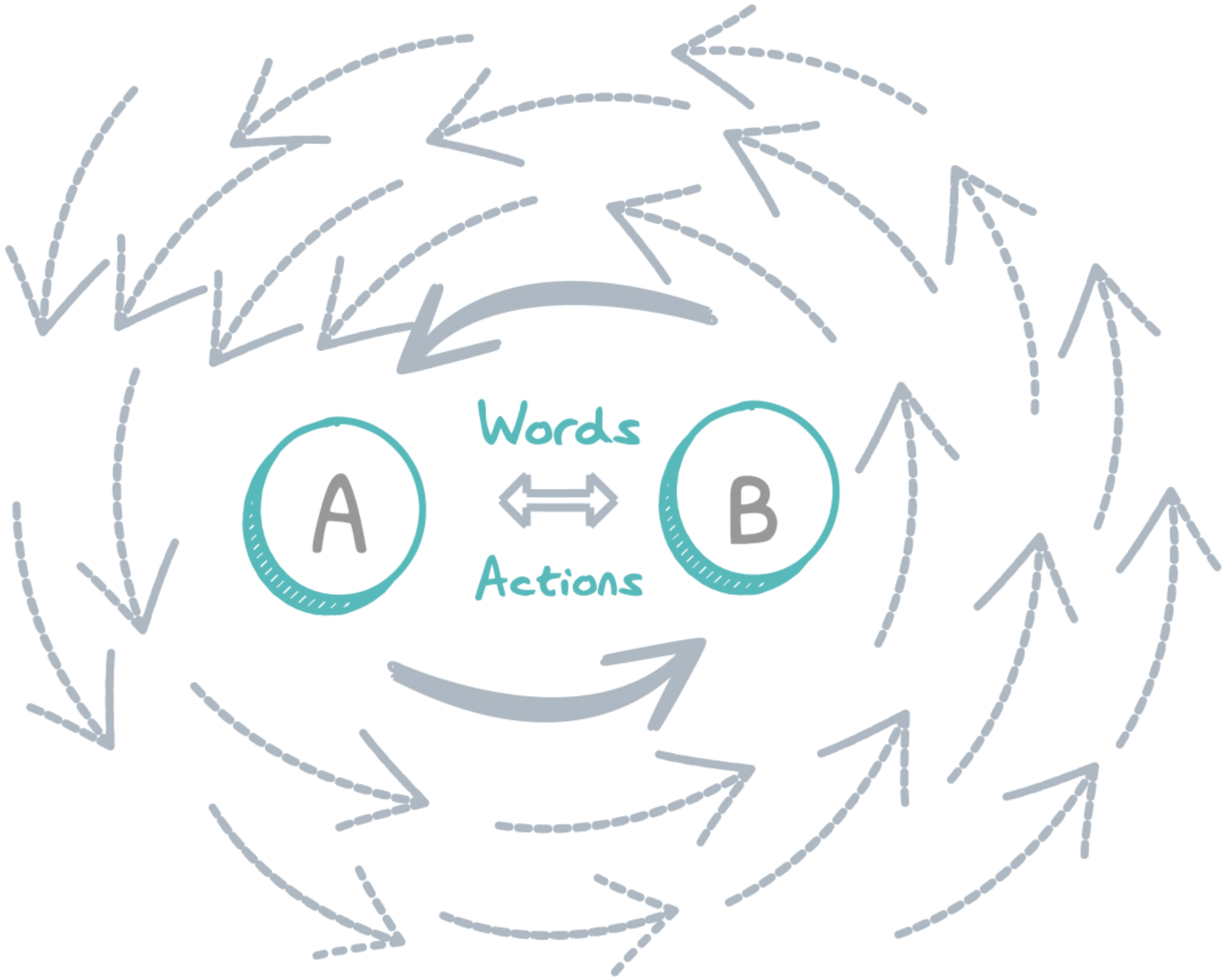
But collaborations take time and trust to form



Adapted from Collaboration Continuum from ACT for Youth

Strategic Doing™
Do More Together.

Trust emerges from stable patterns of aligning words with doing



S-Curves
Wicked Problems
Collaboration
Conversations
Learning
Strategy

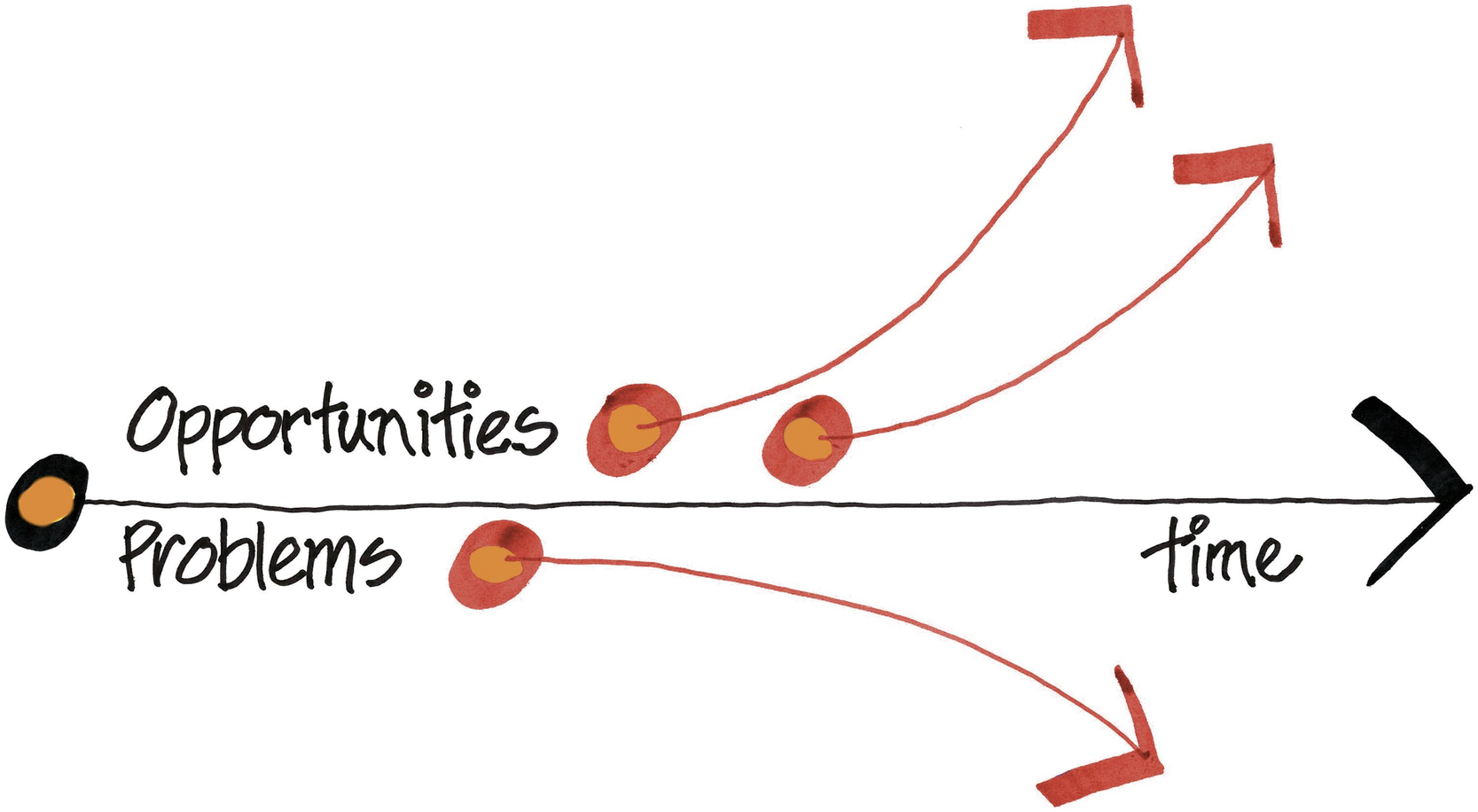
Strategic Doing focuses on our conversations..the core technology of strategy and innovation

“[T]he most important work in the new economy is creating conversations.”

Alan Webber, 1993

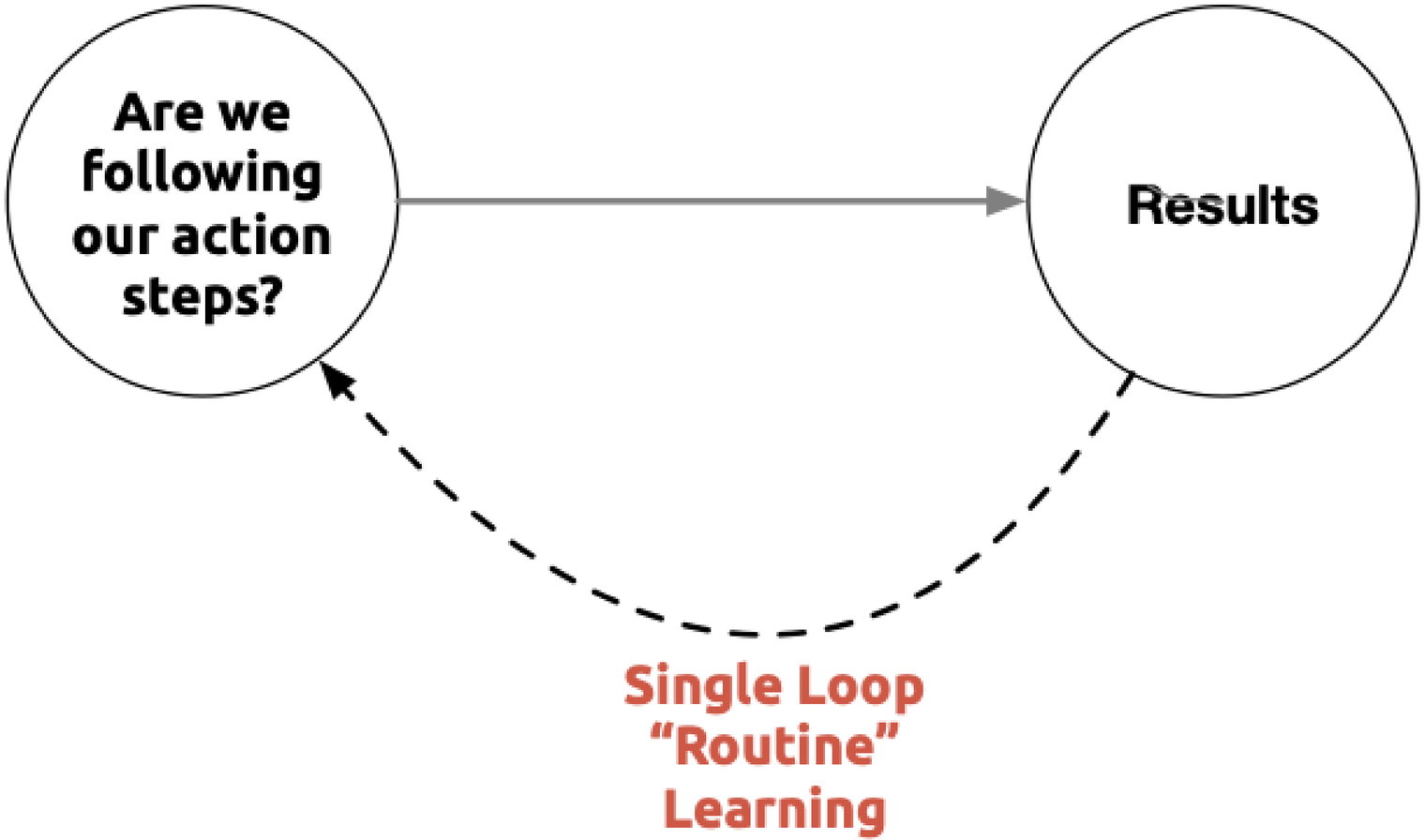
Webber, A. M. (1993). What's so new about the new economy? *Harvard Business Review,* 71(1), 24-33.

People move in the direction of their conversations…Guiding conversations drives how people move



S-Curves
Wicked Problems
Collaboration
Conversations
Learning
Strategy

Routine learning: Are we following our protocol?

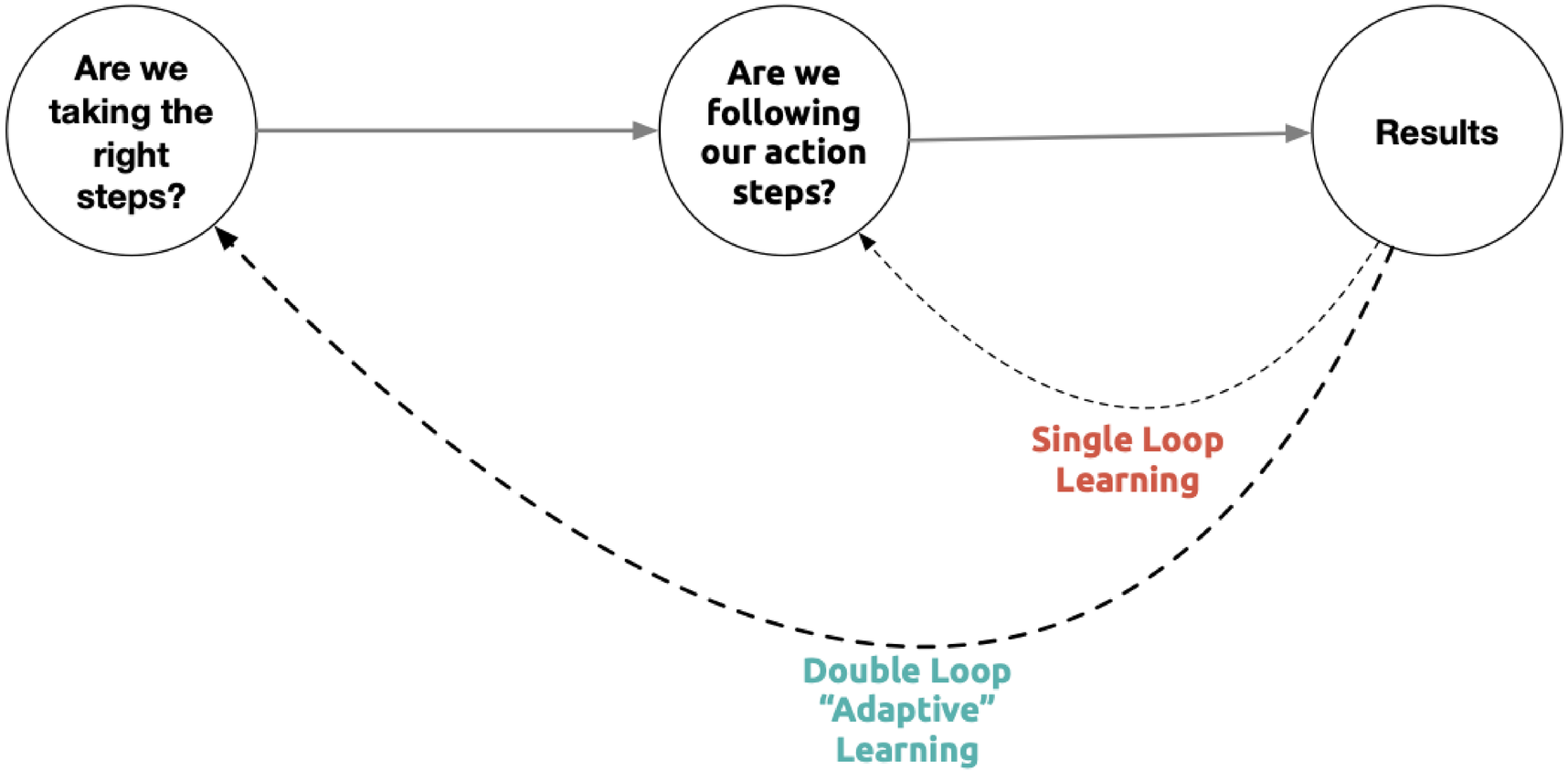


Strategic Doing™
Do More Together.

Adaptive learning: Do we have the right protocol?

Strong Single Loop Learning routines frustrate Double Loop Learning:

“That’s not how we do things around here”

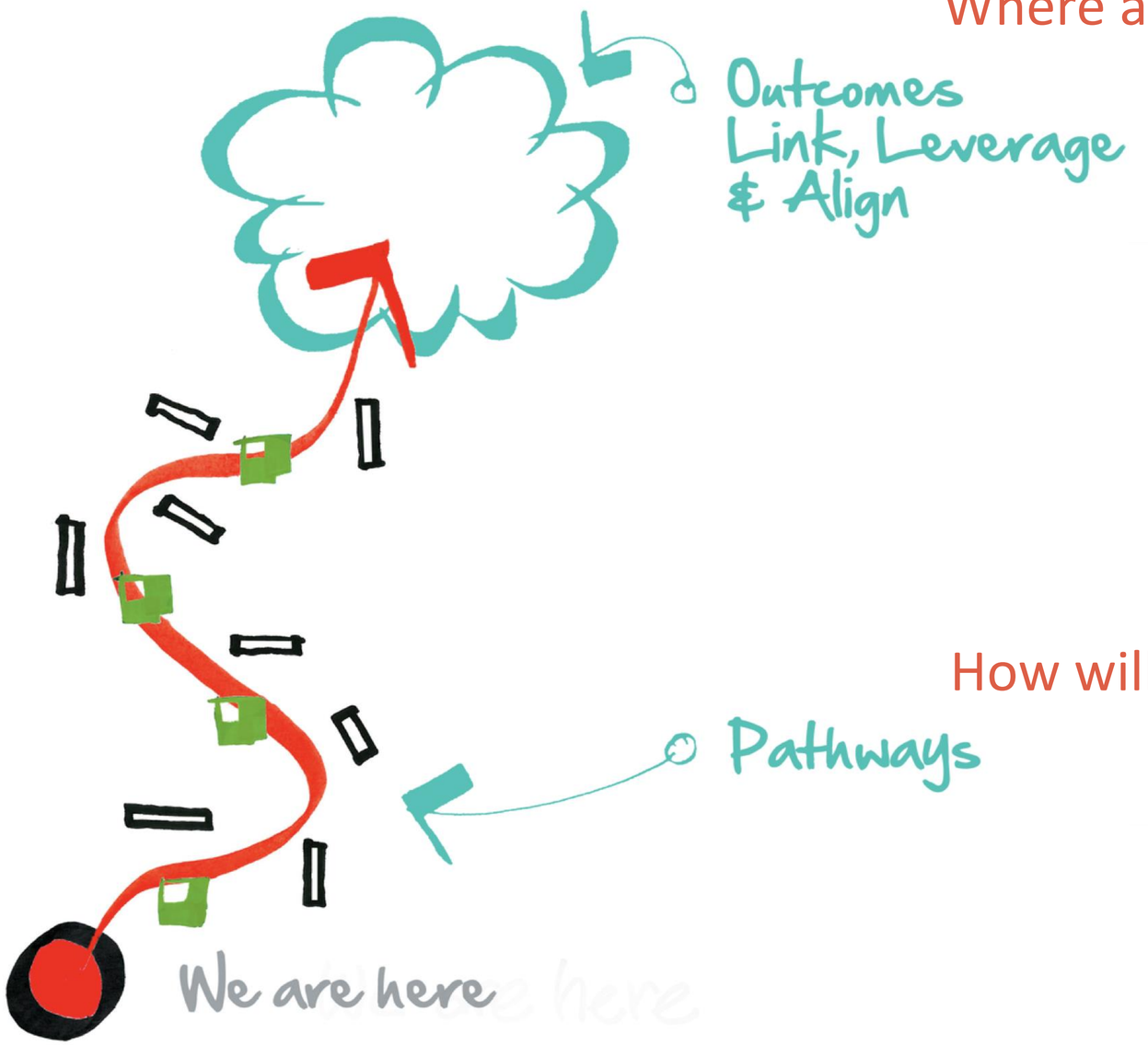


Strategic Doing™
Do More Together.

S-Curves
Wicked Problems
Collaboration
Conversations
Learning
Strategy

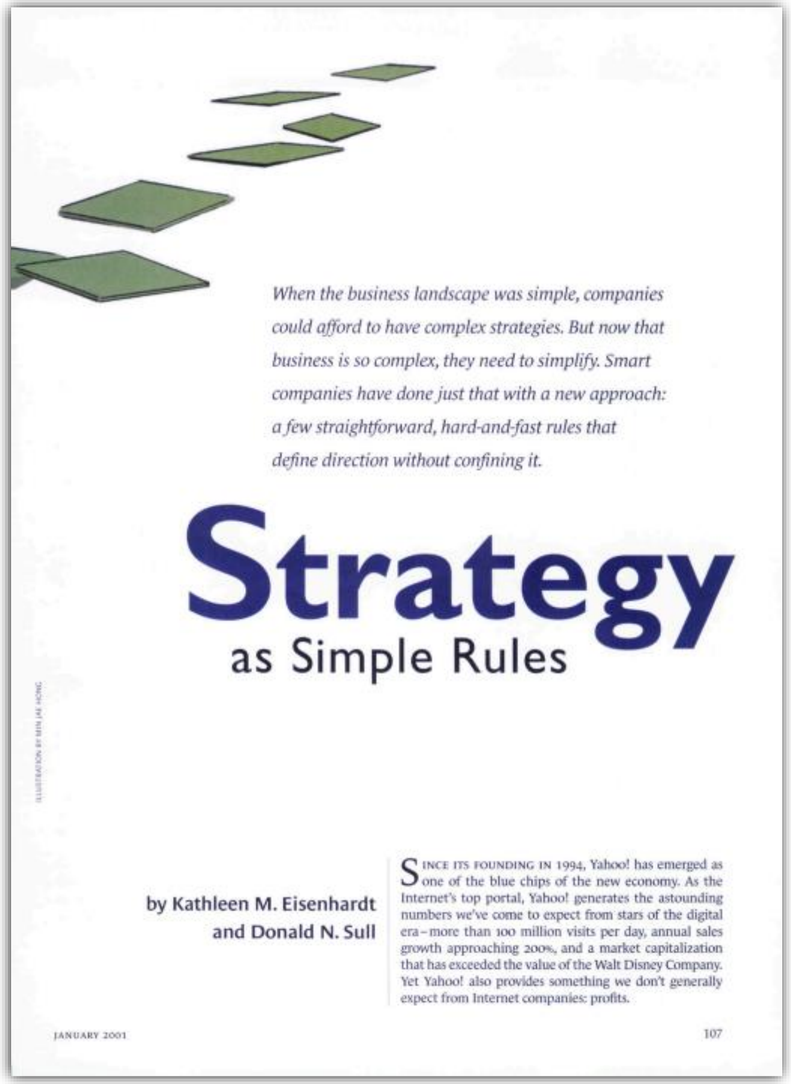
An effective strategy answers 2 questions

Where are we going?



How will we get there?

In dynamic environments, strategy emerges from following simple rules



When the business landscape was simple, companies could afford to have complex strategies. But now that business is so complex, they need to simplify. Smart companies have done just that with a new approach: a few straightforward, hard-and-fast rules that define direction without confining it.

Strategy as Simple Rules

by Kathleen M. Eisenhardt and Donald N. Sull

SINCE ITS FOUNDING IN 1994, Yahoo! has emerged as one of the blue chips of the new economy. As the Internet's top portal, Yahoo! generates the astounding numbers we've come to expect from stars of the digital era – more than 100 million visits per day, annual sales growth approaching 200%, and a market capitalization that has exceeded the value of the Walt Disney Company. Yet Yahoo! also provides something we don't generally expect from Internet companies: profits.

JANUARY 2001

107

Harvard Business Review
January 2001

If you can’t describe what you’re doing as a process, then you don’t know what you are doing.

W. Edwards Deming

Strategic Doing in a Nutshell

*Strategic Doing is a strategy **discipline** designed for teams and open, loosely connected networks*

Strategic Doing™
Do More Together.

Strategic Doing is a strategy discipline designed for teams and open, loosely connected networks

Strategic Doing enables teams to form collaborations quickly, move them toward measurable outcomes, and make adjustments along the way.

Strategic Doing™
Do More Together.

Strategic Doing is a strategy discipline designed for teams and open, loosely connected networks

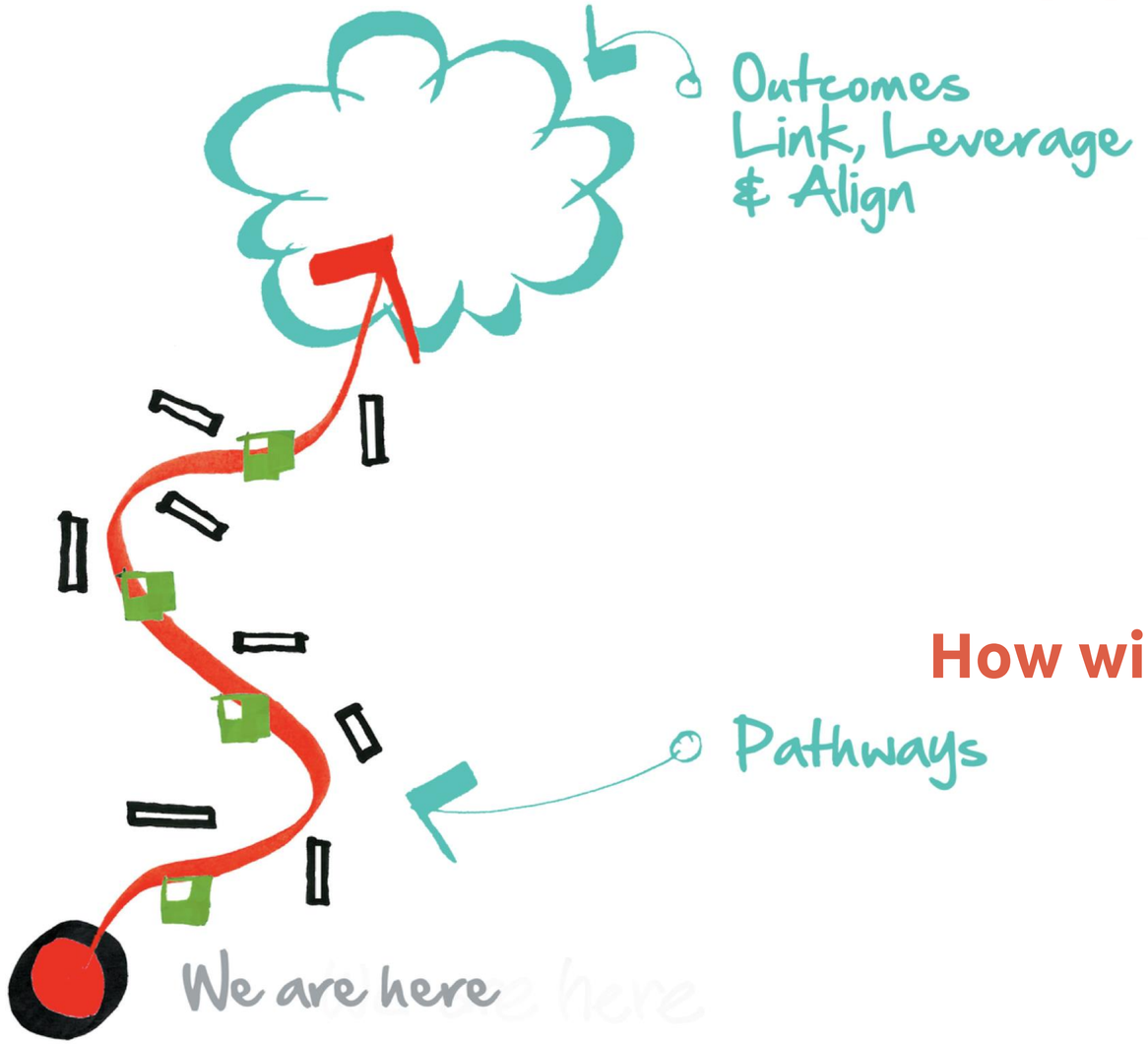
Strategic Doing enables teams to form collaborations quickly, move them toward measurable outcomes, and make adjustments along the way.

Strategic Doing is an open-source operating system for collaboration, open innovation, and ecosystems.

Strategic Doing™
Do More Together.

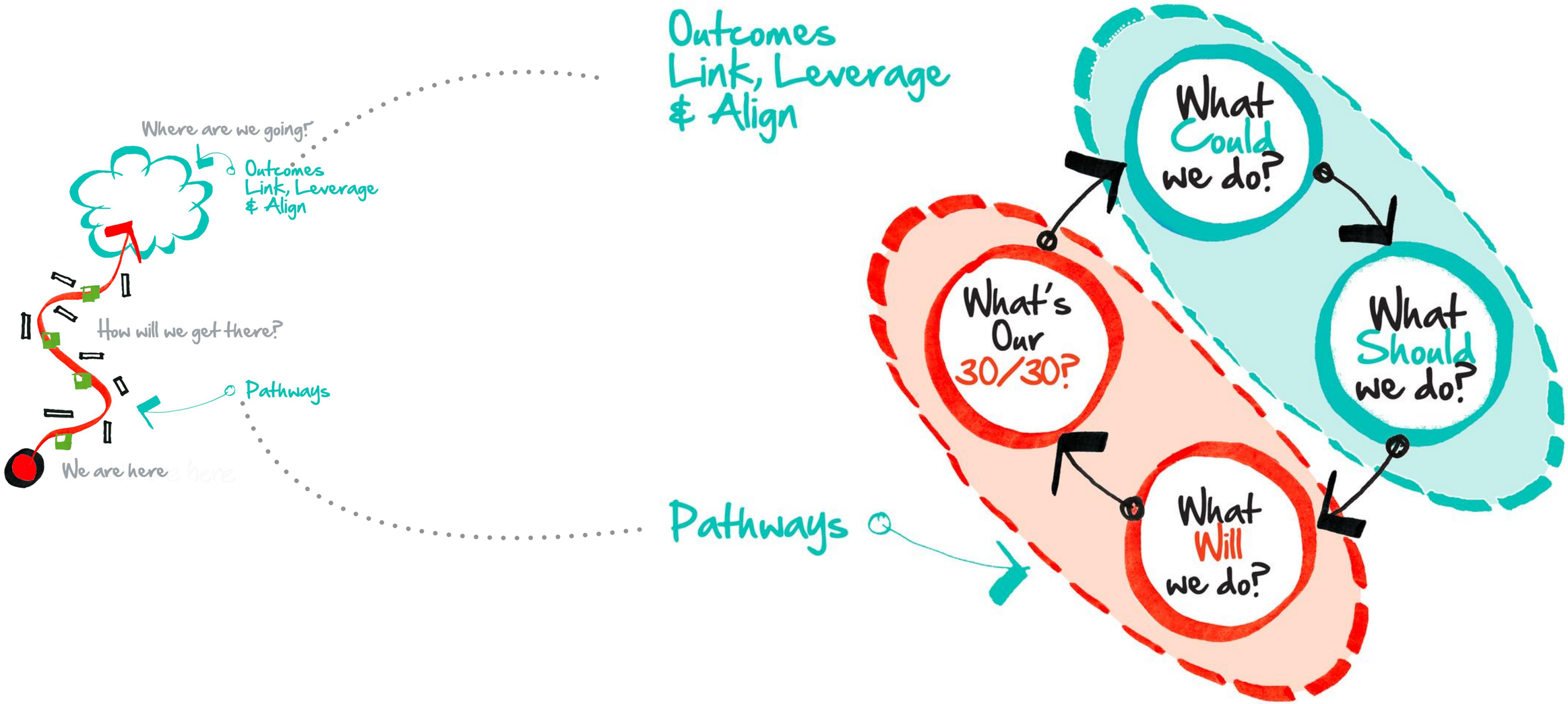
Remember our starting point:
a Strategy answers 2 questions

Where are we going?



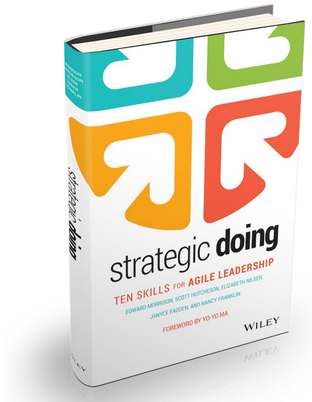
How will we get there?

We design strategic conversations with four questions…



Answers to 2 questions define a strategy

Answers to 4 questions define a strategic conversation

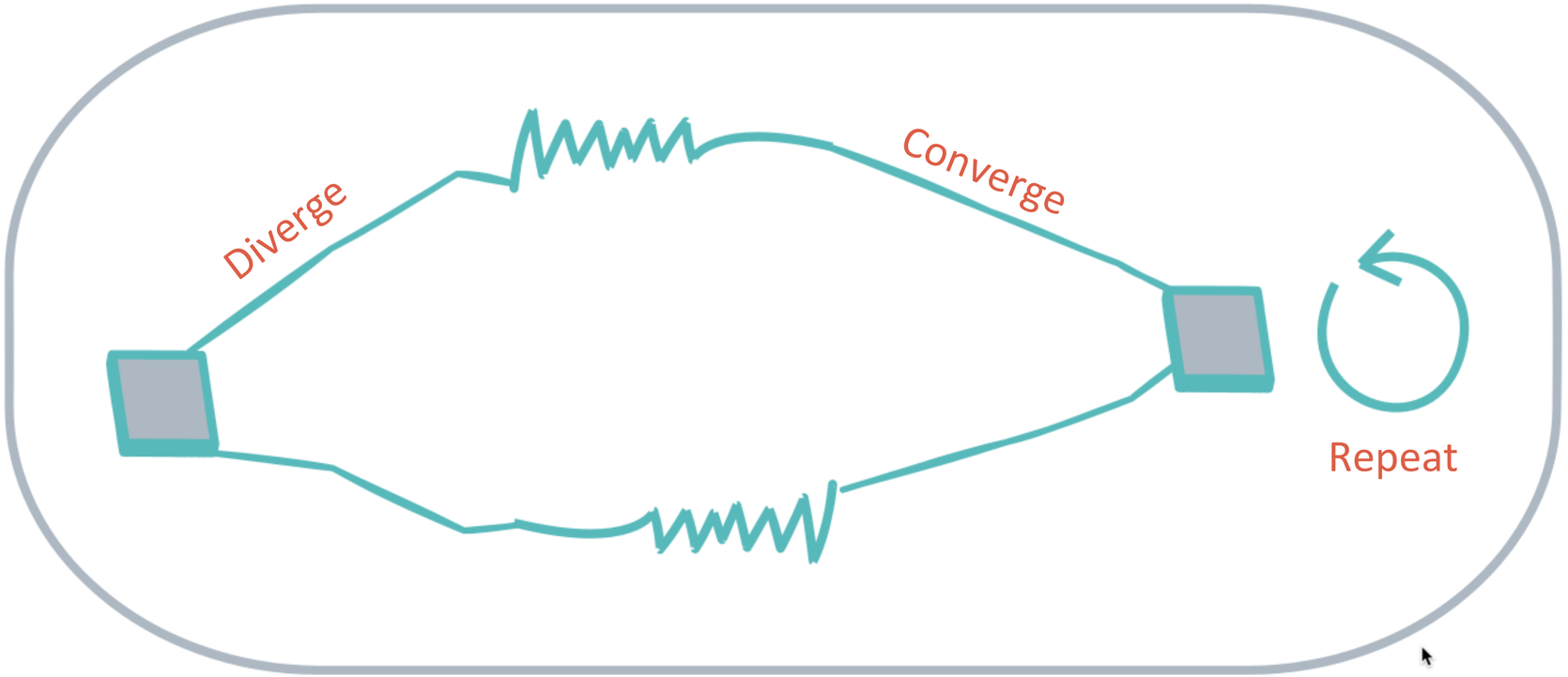


10 skills to design and guide Strategic Conversations

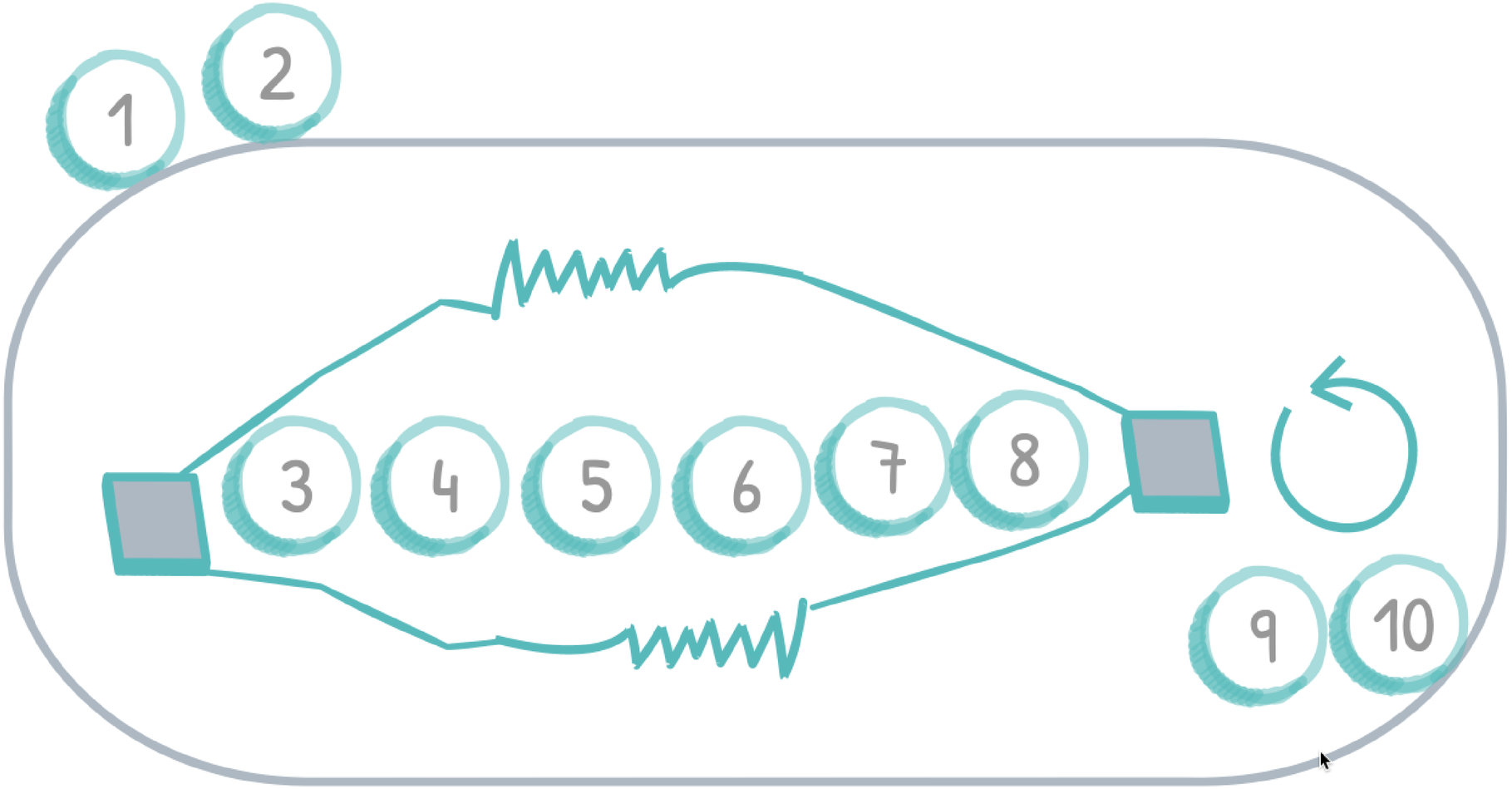
Hidden Structures

Collaborations emerge from our conversations

Collaborations emerge from conversations with a predictable structure: divergent, convergent, and recursive



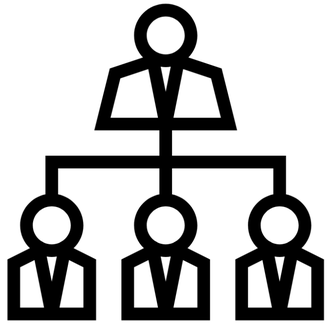
We design and guide these conversations by following 10 rules that translate into 10 skills

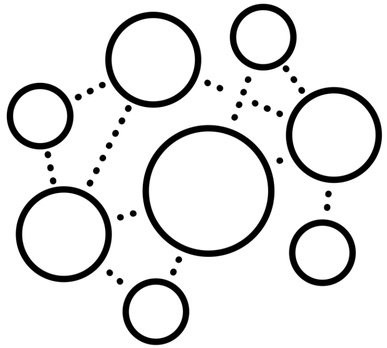


Development Path

Test beds, simple rules, and skills

We are moving from hierarchies toward networks





1970 1980 1990 2000 2010 2020

Trade barriers lower

E-mail invented

US manufacturing begins to globalize

In Search of Excellence

Fifth Discipline

Crossing the Chasm

Netscape browser launches

Re-engineering

Good to Great

The World is Flat

Execution

Open Innovation

Design Thinking

Business Model Generation

Blue Ocean Strategy

COVID

Strategic Doing Development

Strategic Doing developed over 25 years of practitioner-led research in the “swampy lowlands”

How could we build a digital cluster in Charleston ?

PURDUE
UNIVERSITY
How do we address opioid addiction in a community?

How can Puerto Rico recover from Maria?

POST HURRICANE WILMA ASSESSMENT
How do we transform engineering education at 50 universities?

How do we develop a technology roadmap for the destroyer fleet?
39

How do we collaborate across the life sciences within NASA?

How does Strategic Doing work?

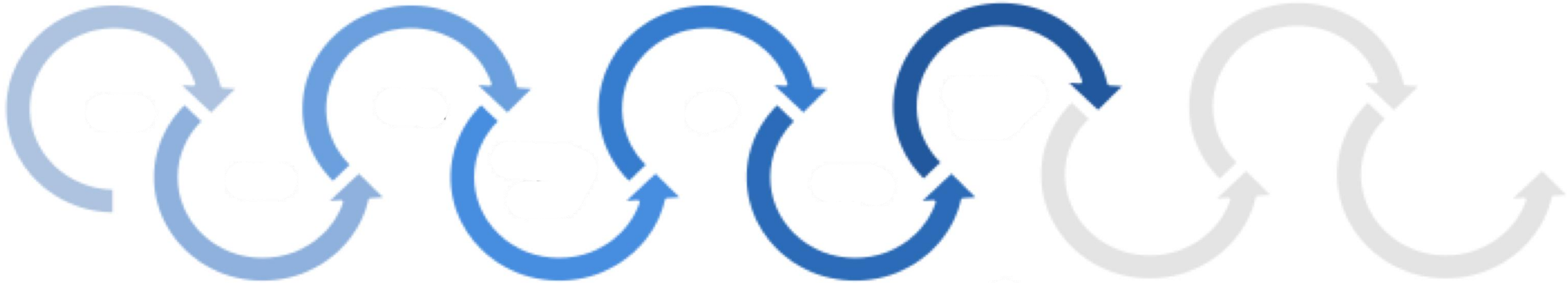
Strategies emerge from fast think/do cycles

Strategic Planning

Doing

Planning

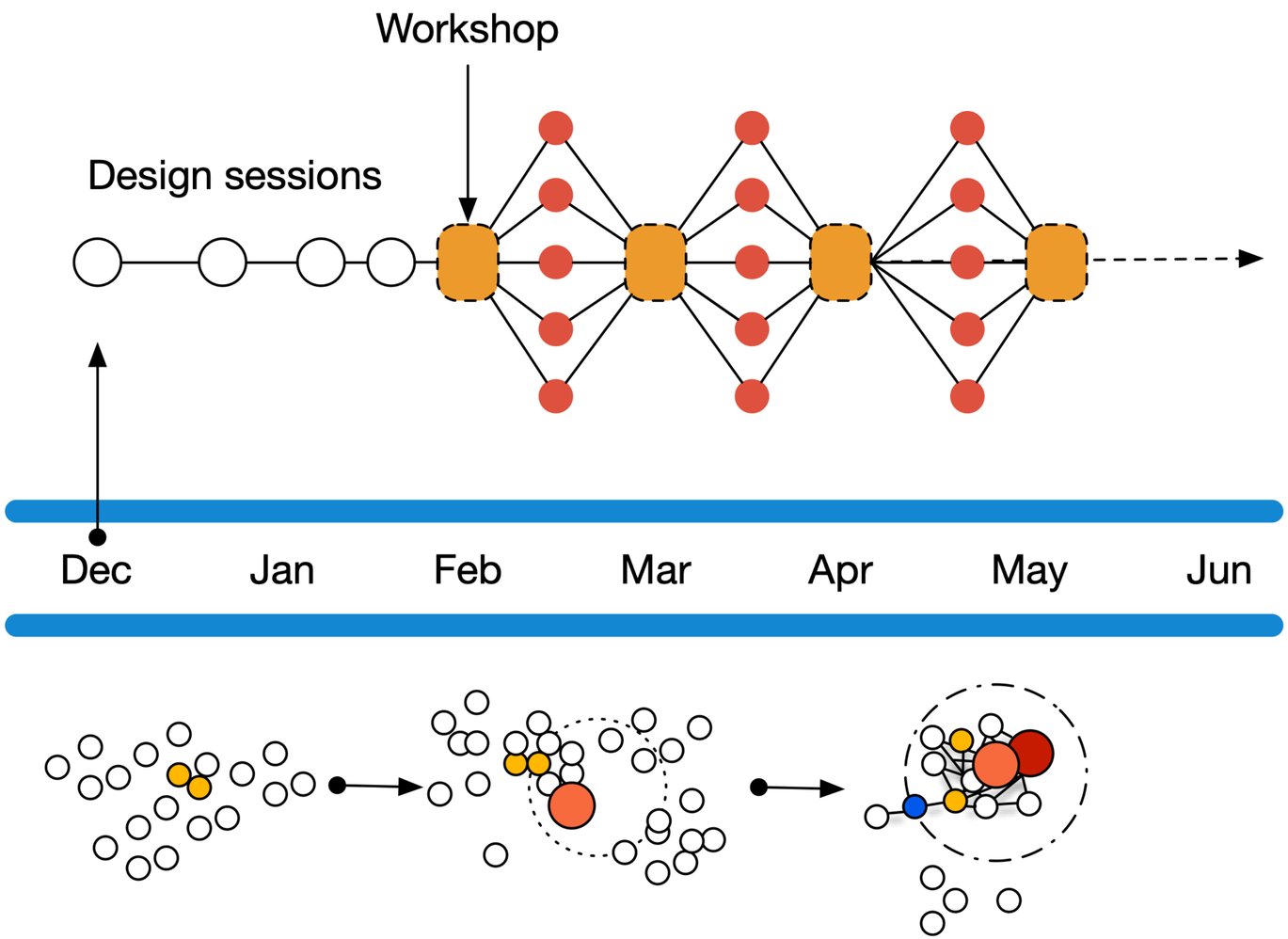
Strategic Doing



Adapt/Plan/Do/Learn Cycles

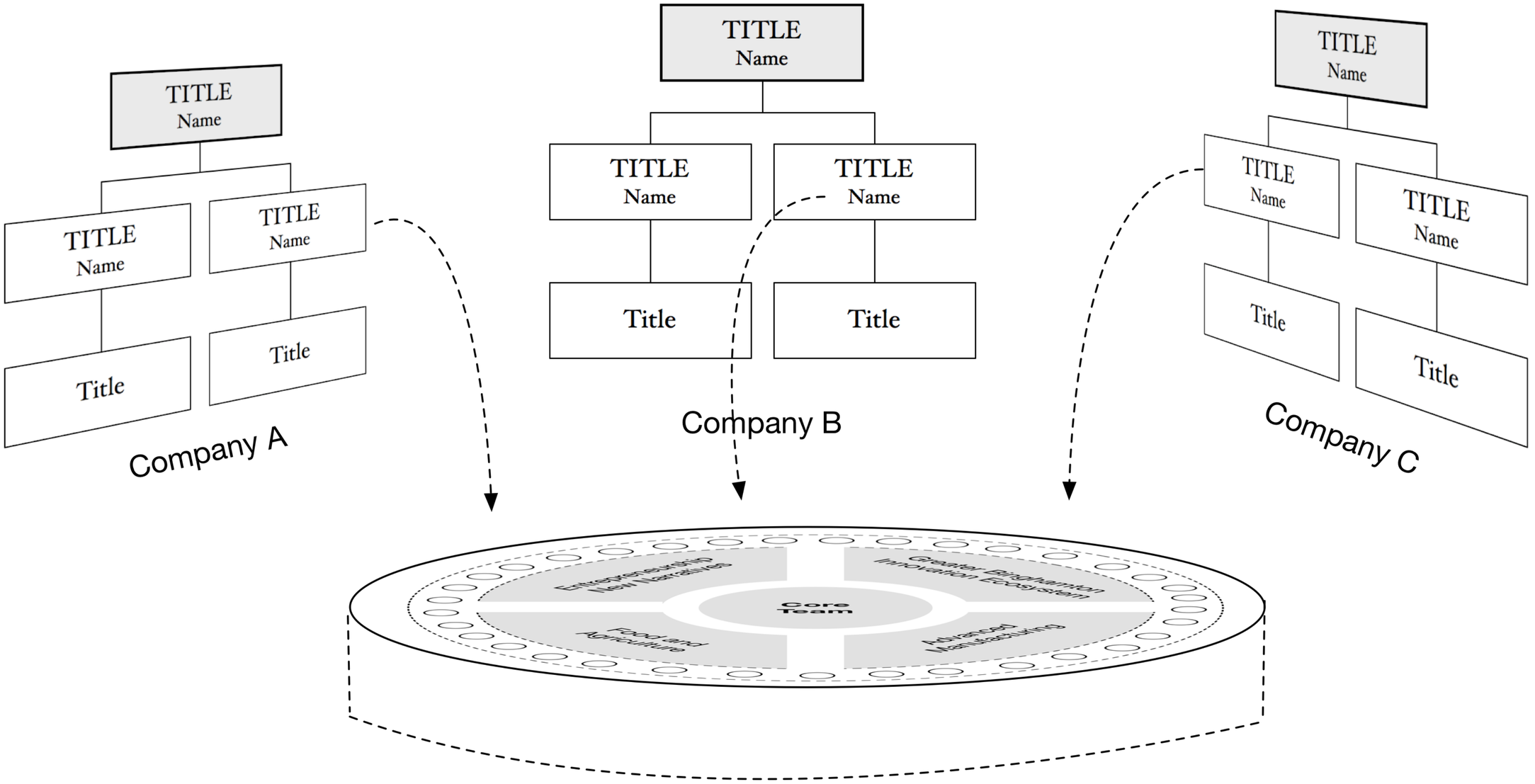
How do we develop a technology roadmap for the destroyer fleet?
39

Start by designing a process

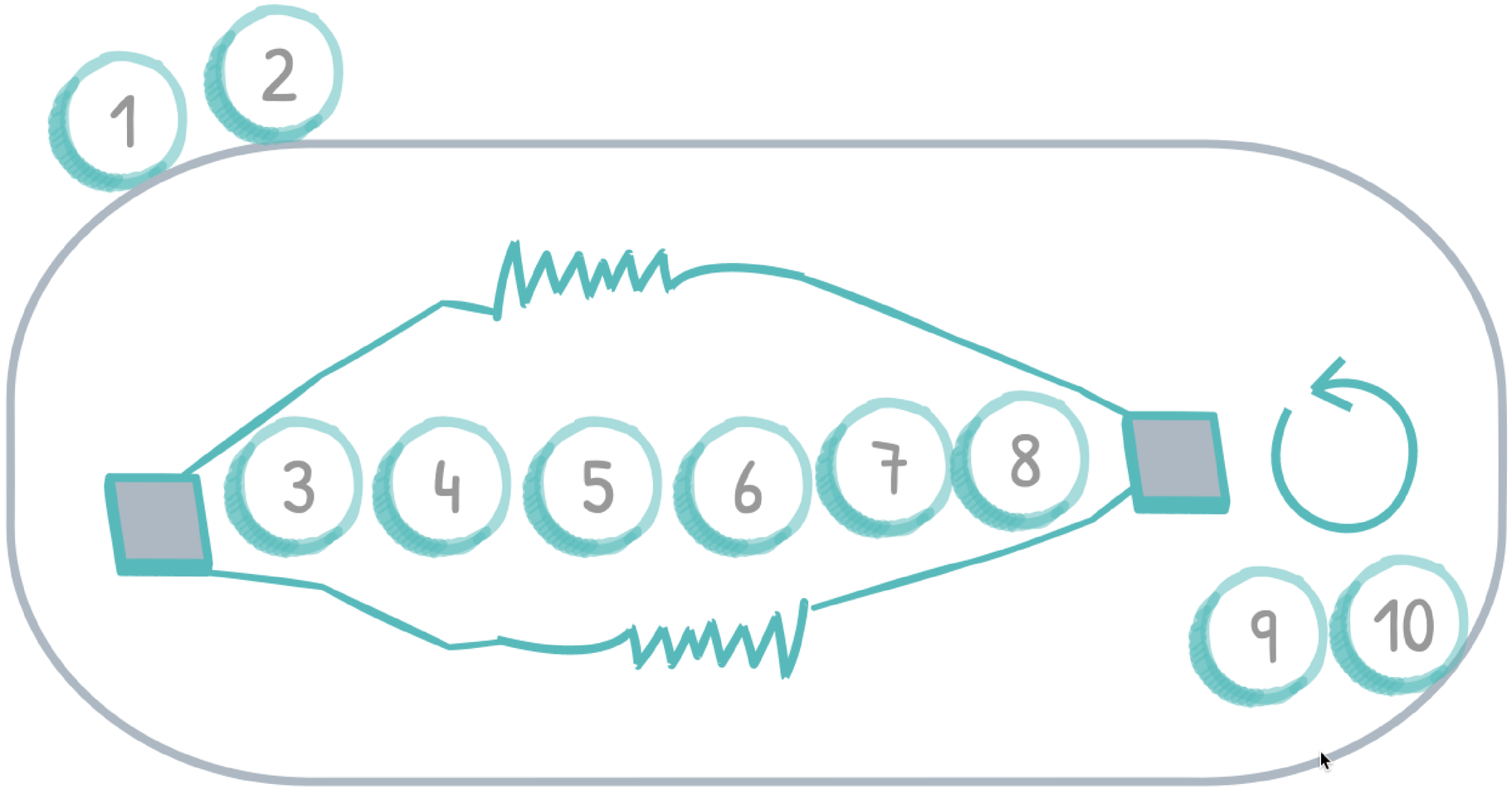


We used this drawing to explain to Lockheed executives how a strategy process would unfold

Create a platform on which an ecosystem can form



Design and guide strategy workshops by following 10 rules that translate into 10 skills



Design and guide strategy workshops

1

TABLE GUIDE:

KNOWLEDGE KEEPER:

2

RULE 1: Create and maintain a safe space for deep, focused conversation.

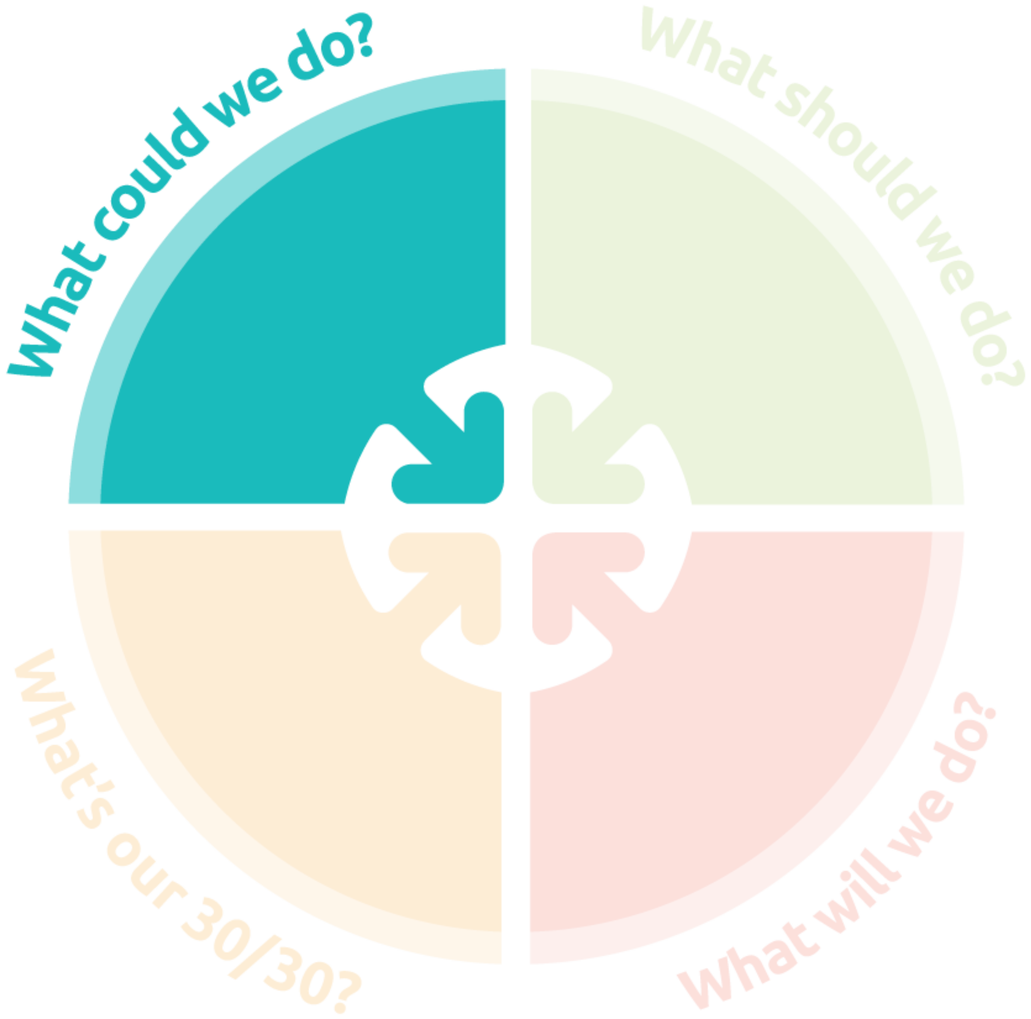
RULE 2: Frame a conversation around an appreciative question.

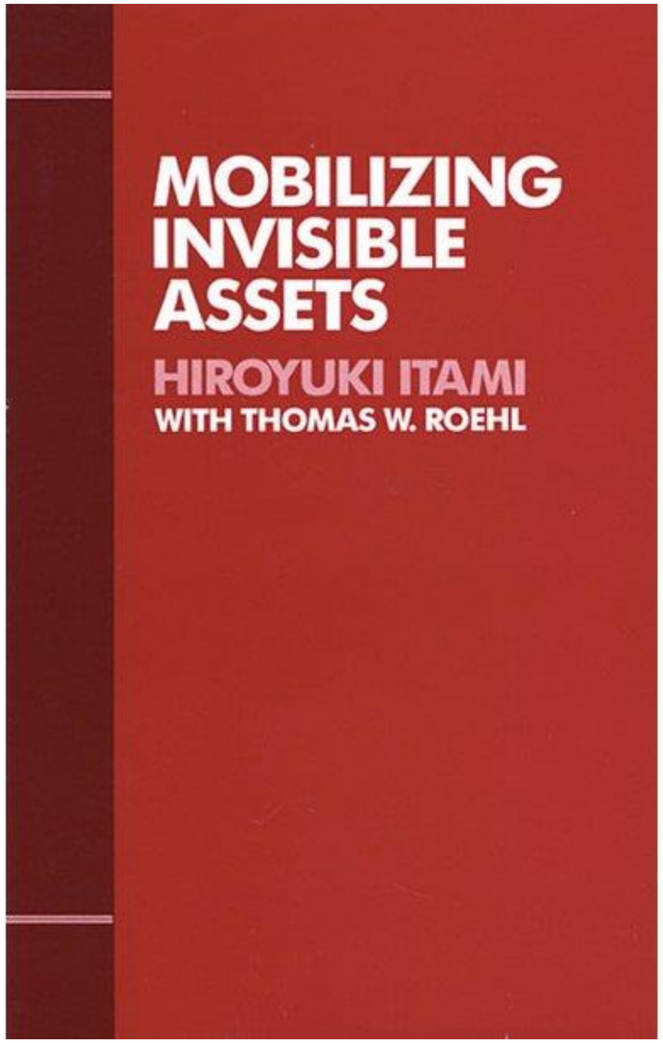
3

FRAMING QUESTION
Imagine we developed a roadmap to deploy CBM across the Navy's destroyer fleet. What would that look like?

What could we do?

Rule 3: Uncover hidden assets that people are willing to share





Invisible assets “are unattainable with money alone, are time-consuming to develop, are capable of multiple simultaneous uses, and yield multiple simultaneous benefits.”

Itami, H., & Roehl, T. W. (1991). Mobilizing invisible assets. Harvard University Press.

RULE 3: Uncover hidden assets people are willing to share.

What assets is each person willing to share? Focus your conversation not so much on what you do, but on resources you are willing to share with a new network (e.g., physical assets, skills and knowledge assets, social/network assets, capital assets.)

PERSON	ASSET(S)

>> Next, you'll connect these assets to create new opportunities

What could we do?

Rule 4: Link and leverage your assets to create new opportunities

RULE 4: Link and leverage your assets to create new strategic opportunities (Part 2).

Narrow your link-and-leverage ideas to your three (four if you must) top choices. How could you describe each opportunity in one or two phrases?

"BUMPER STICKER" TITLE (<20 WORDS)	DESCRIPTION

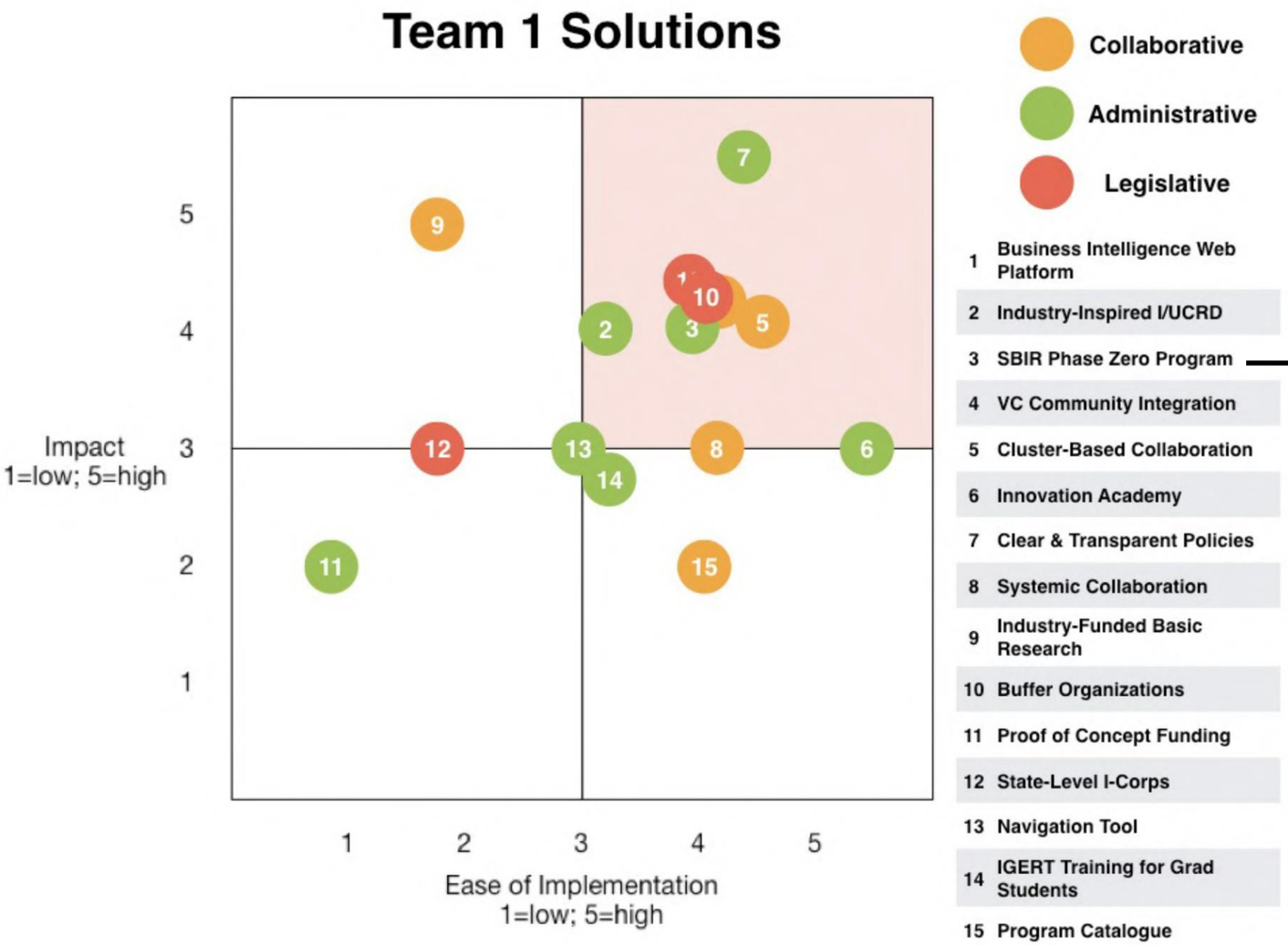
>> Use the next slide to find your "Big Easy"

Strategic focus areas emerge as workshops develop

What should we do?

Rule 5: Rank all your opportunities to find your "Big Easy"

Here is an example taken from a workshop in Washington, D.C.



What should we do?

Rule 6: Convert your Big Easy into an outcome with measurable characteristics (Where you are going)

RULE 6: Convert your "Big Easy" into a strategic outcome by adding measurable characteristics.

20 min.

What would people see, how would people feel, how would people's lives be different if we were completely successful?

SUMMARY OF YOUR STRATEGIC OPPORTUNITY (The Big Easy)	CHARACTERISTIC (What will be different?)	SUCCESS METRICS (<3 Per Characteristic)

>> Use the next page to define guideposts and a pathway to reach your outcome

YOUR STRATEGIC DOING MAP

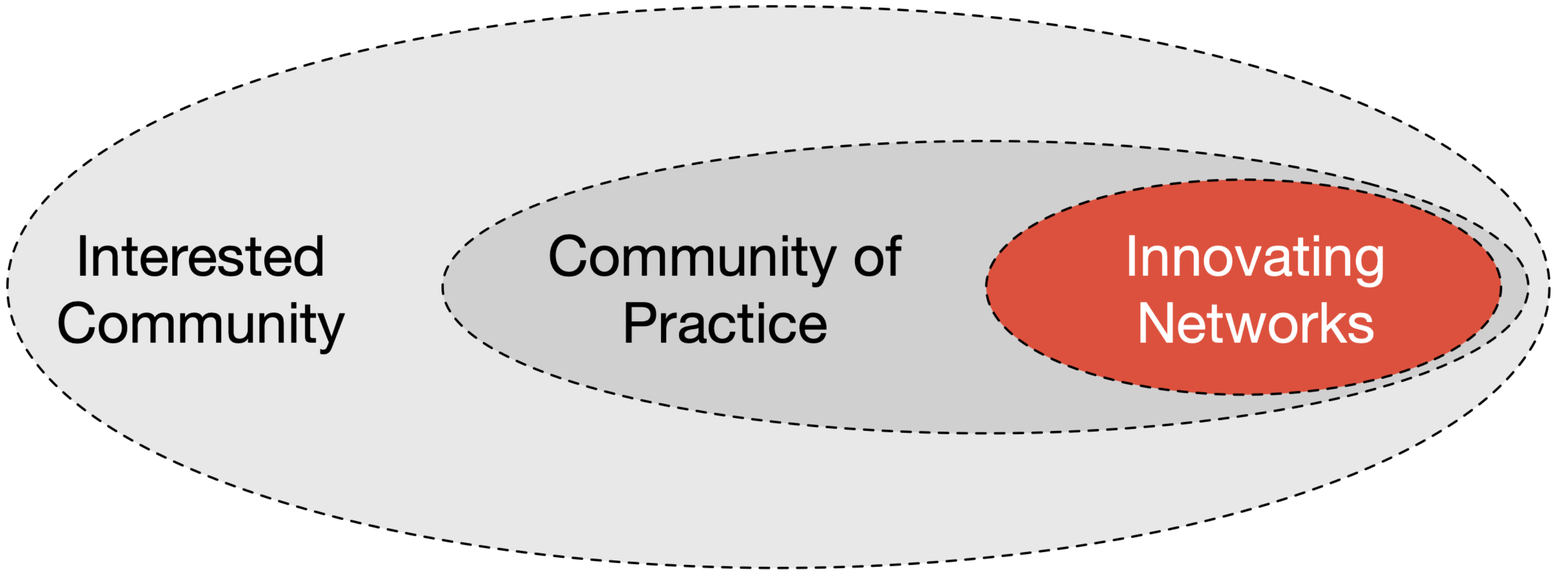
Having your strategy on one page can help you see the big picture and communicate it with others. Summarize your strategy here so that everyone has talking points.

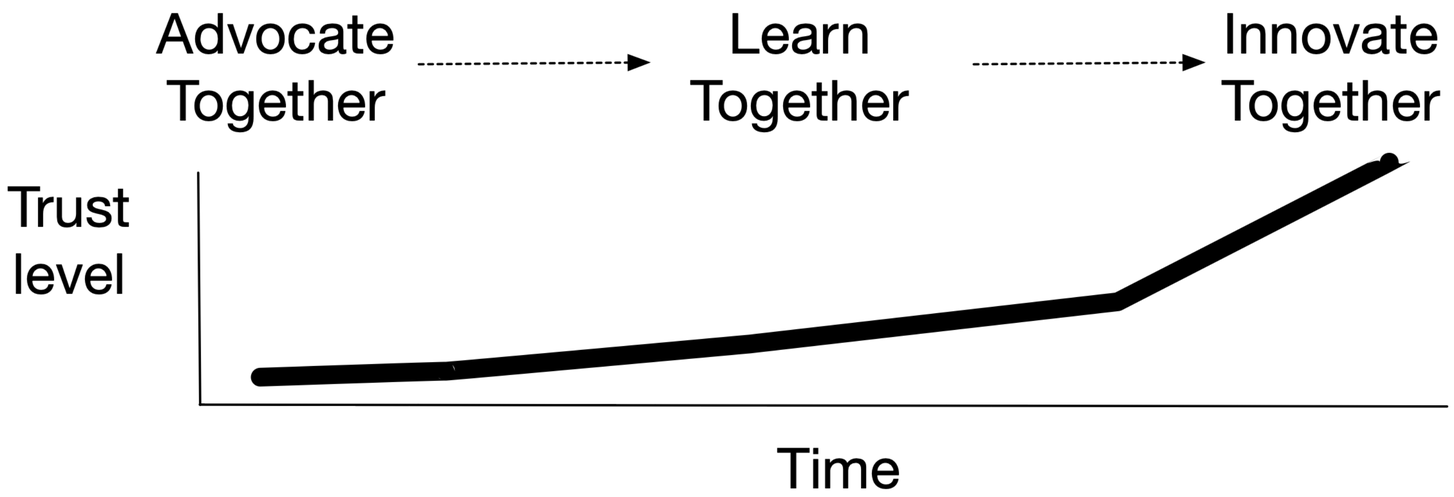
OUTCOME Where are we going?	
SUCCESS METRICS How will we know when we've arrived?	1
	2
	3
PATHFINDER PROJECT How will we get started?	
GUIDEPOSTS How will we know we're not lost?	1
	2
	3
ACTION PLAN What will we start doing by next week?	1
	2
	3

ACTION PLAN What will we each start doing in the next 30 days?	

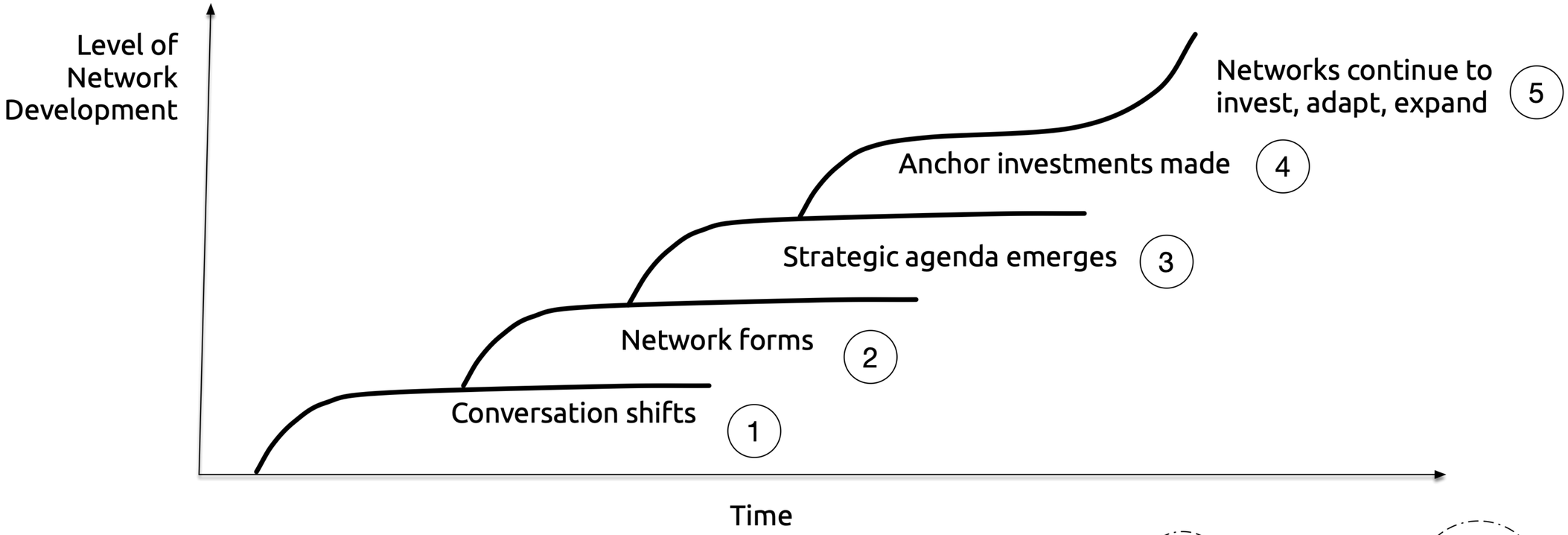
Strategy Map
TEXAS A&M Libraries

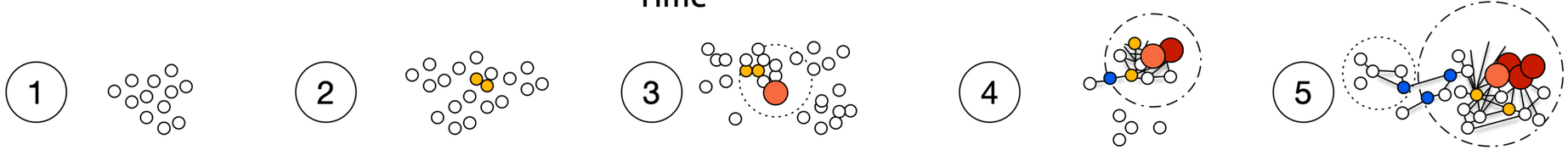
Innovating networks take time and trust to form





Move the emerging ecosystem through development horizons





Conversation shifts.-- Collaborations begin to form with conversations among companies that share a similar “competitive space”. Participants begin testing ideas about colabrotion.

Network forms.-- As focused conversations continue, common interests emerge. These shared interests drive conversations to deeper detail. Connections among firms become stronger.

Strategic agenda emerges.-- Members of the emerging network begin to focus on strategic opportunities. These opportunities emerge as firms “link and leverage” their assets.

Anchor investments made.-- As the collaborations form, members develop a strategic agenda: a portfolio of investments to strengthen themselves through collaboration.

Collaboration continues to invest, adapt and expand.-- Connections within the network become more dense and spontaneous. New shared investments build out the collaboration.

AGILE STRATEGY LAB PURDUE

Strategic Doing allows a business to quickly identify an interested ecosystem of local businesses to solve a defined customer problem.

Todd Tangert
Former Combat Systems Architect Lockheed Corporation

LOCKHEED MARTIN

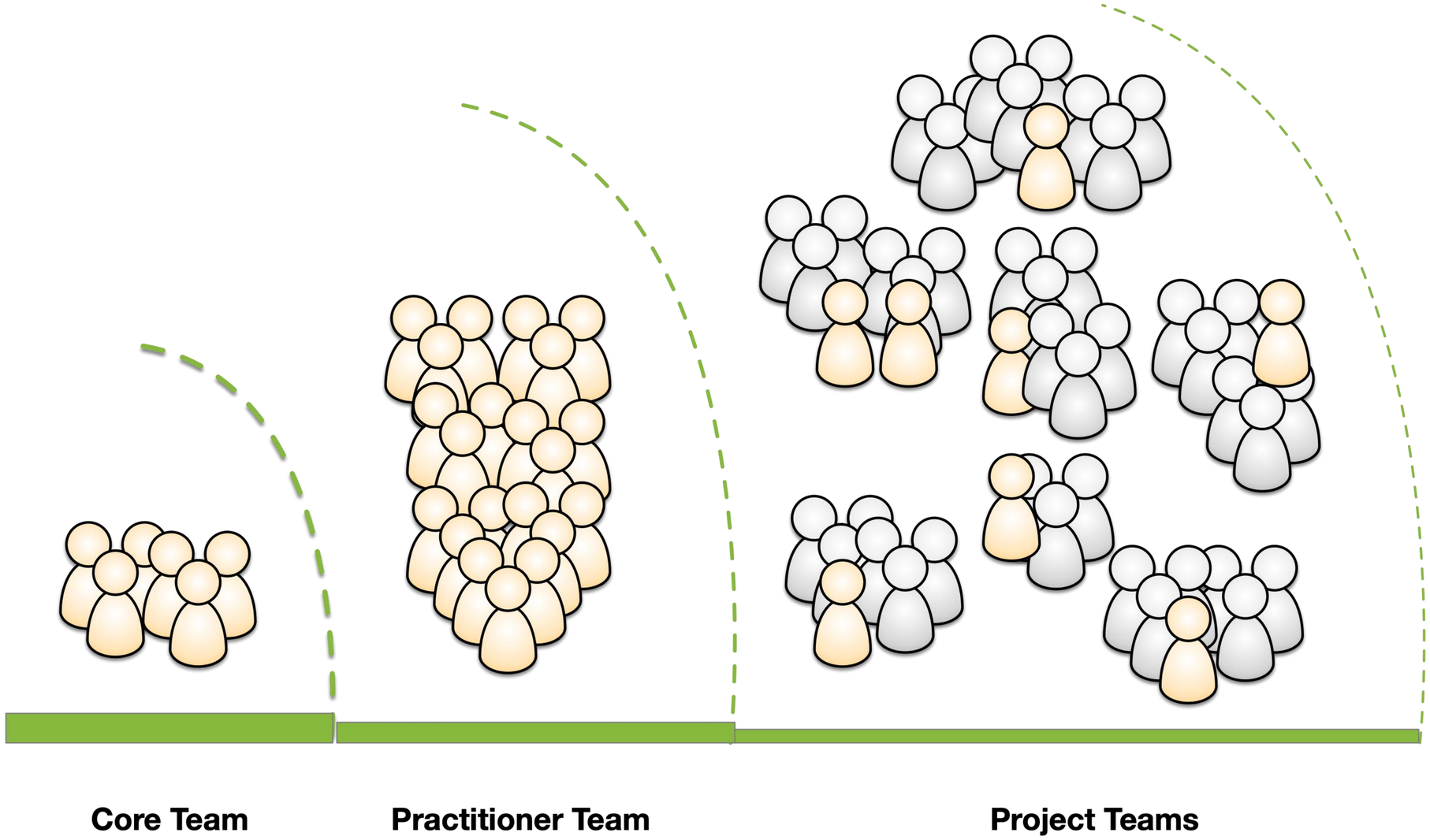
AGILE STRATEGY LAB
PURDUE

I've worked with large companies trying to do open innovation, but the Strategic Doing process is unique. This is the most clear and concise open innovation process I've seen.

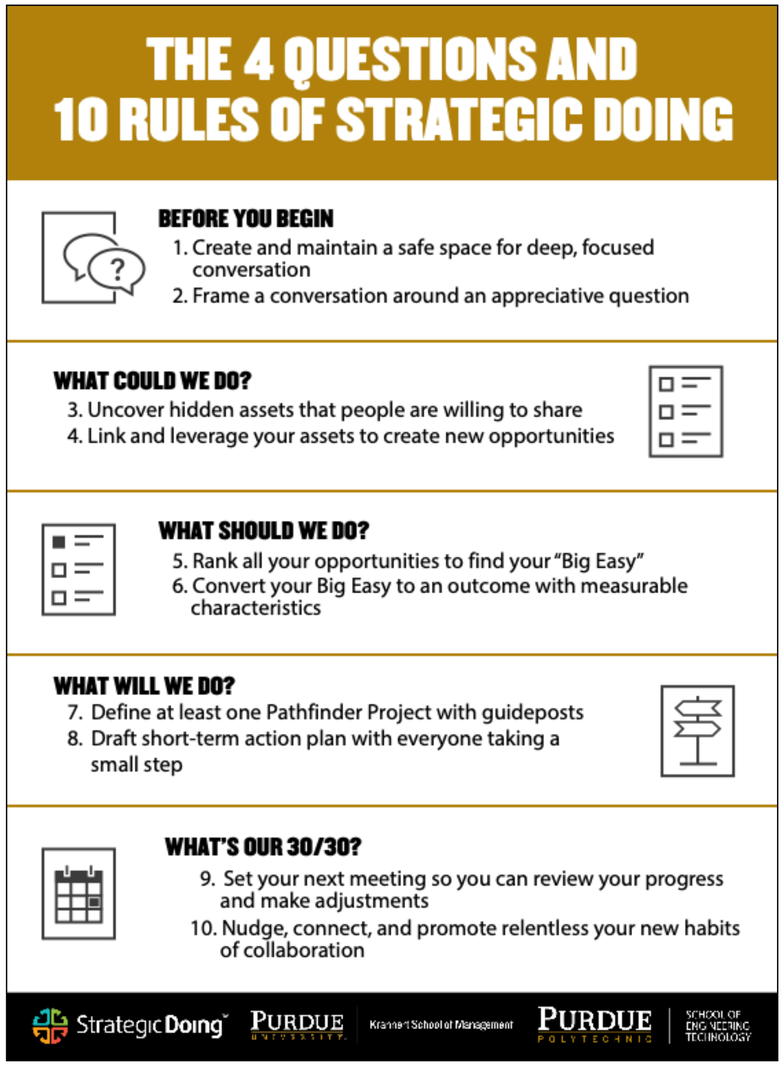
Mark Scotland
Chief Operating Officer
4.0 Analytics

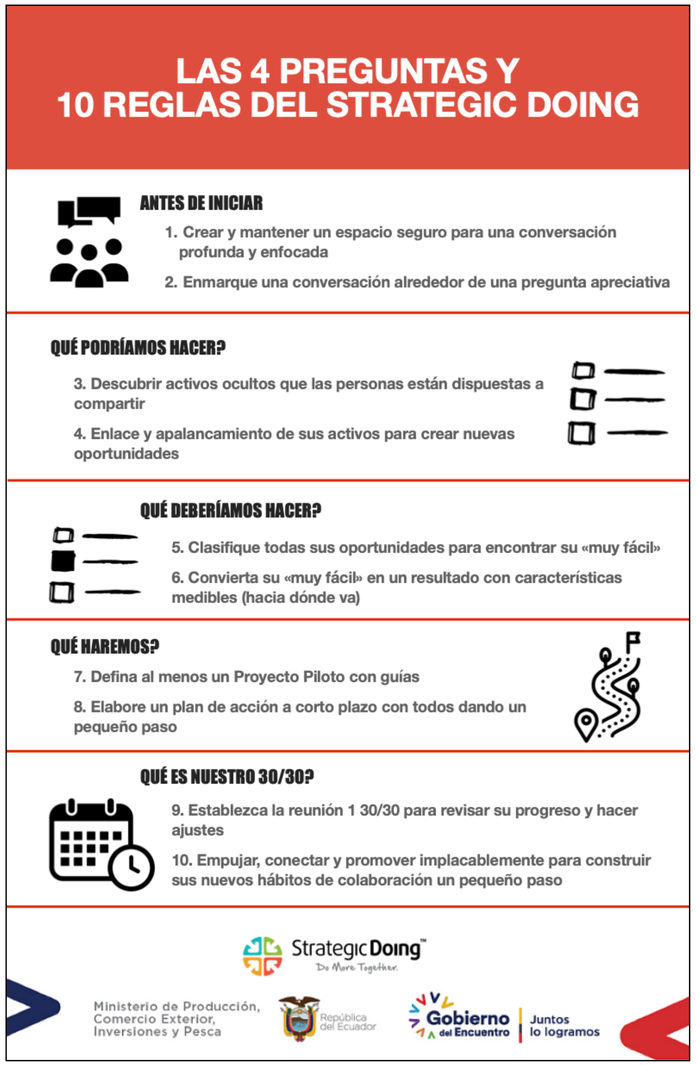
4.0 Analytics

The diffusion of Strategic Doing across an organization takes place in phases

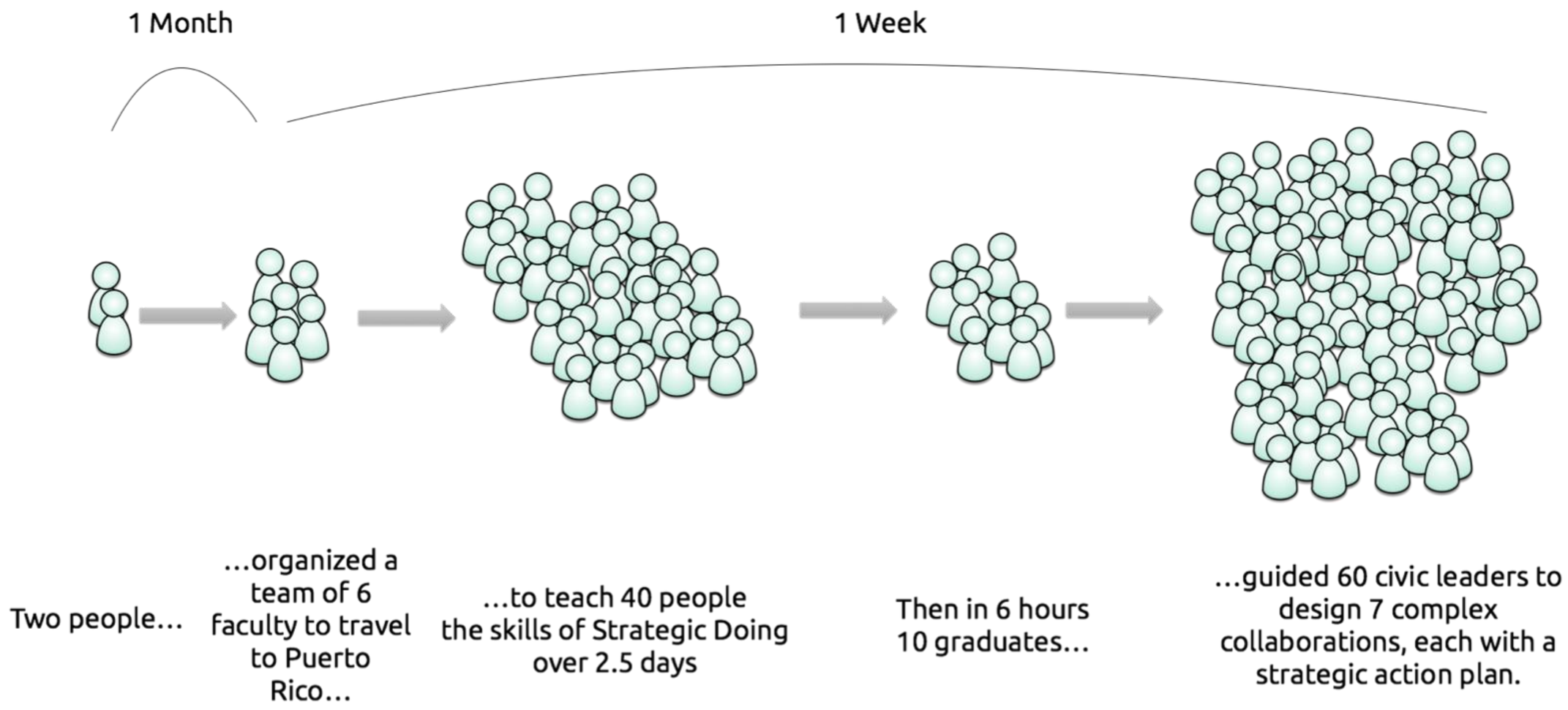


Start by learning and practicing the skills





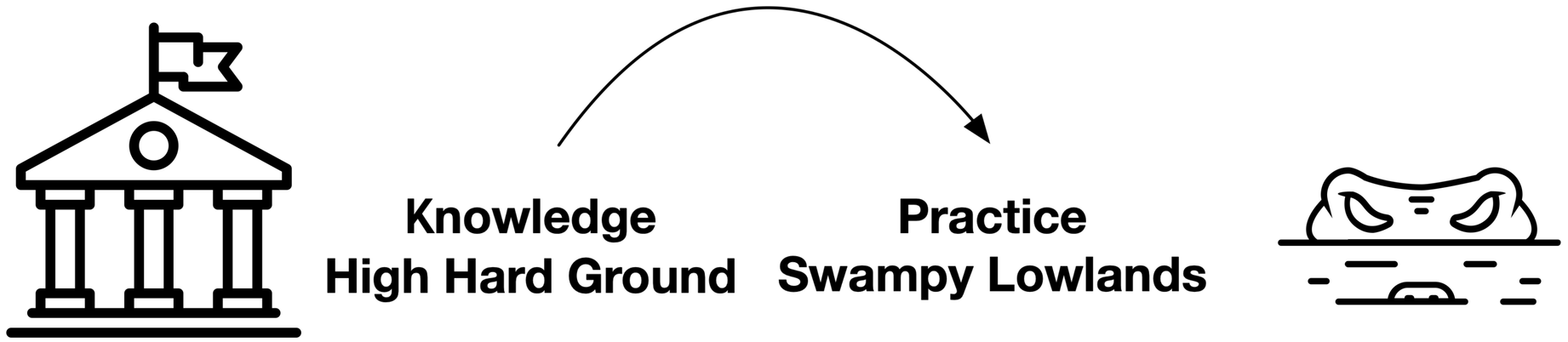
Scaling Strategic Doing can happen quickly: an example from Puerto Rico's hurricane recovery



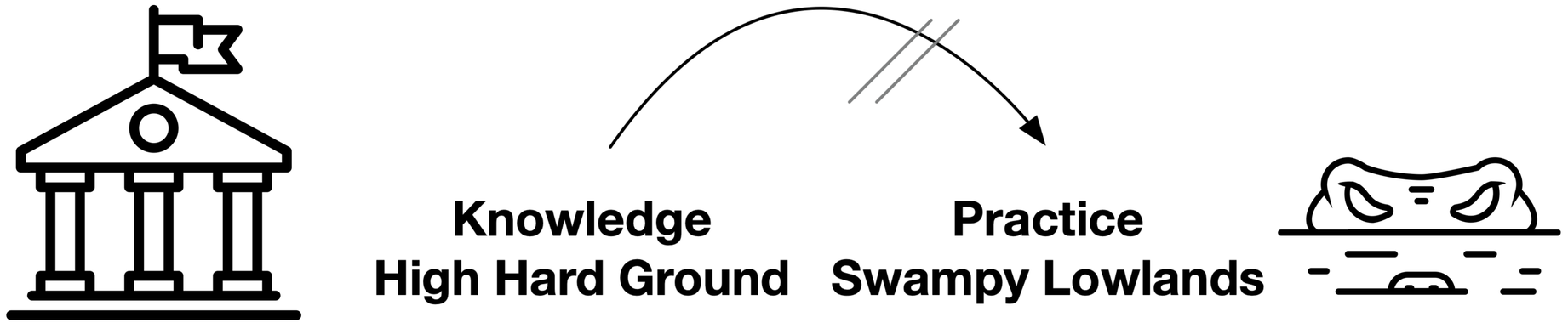
Strategic Doing is a flexible, customizable process…Larger scale deployments can be organized into loose hierarchies

Why does Strategic Doing work?

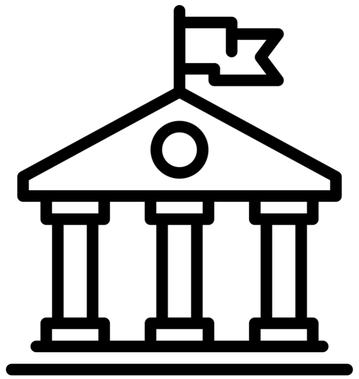
Scholars come up with knowledge that practitioners use



But this pathway often does not work…



Strategic Doing proves that practitioners can generate scholarly knowledge



Knowledge
High Hard Ground

Practice
Swampy Lowlands

Scholarly research across multiple disciplines explains why the model works

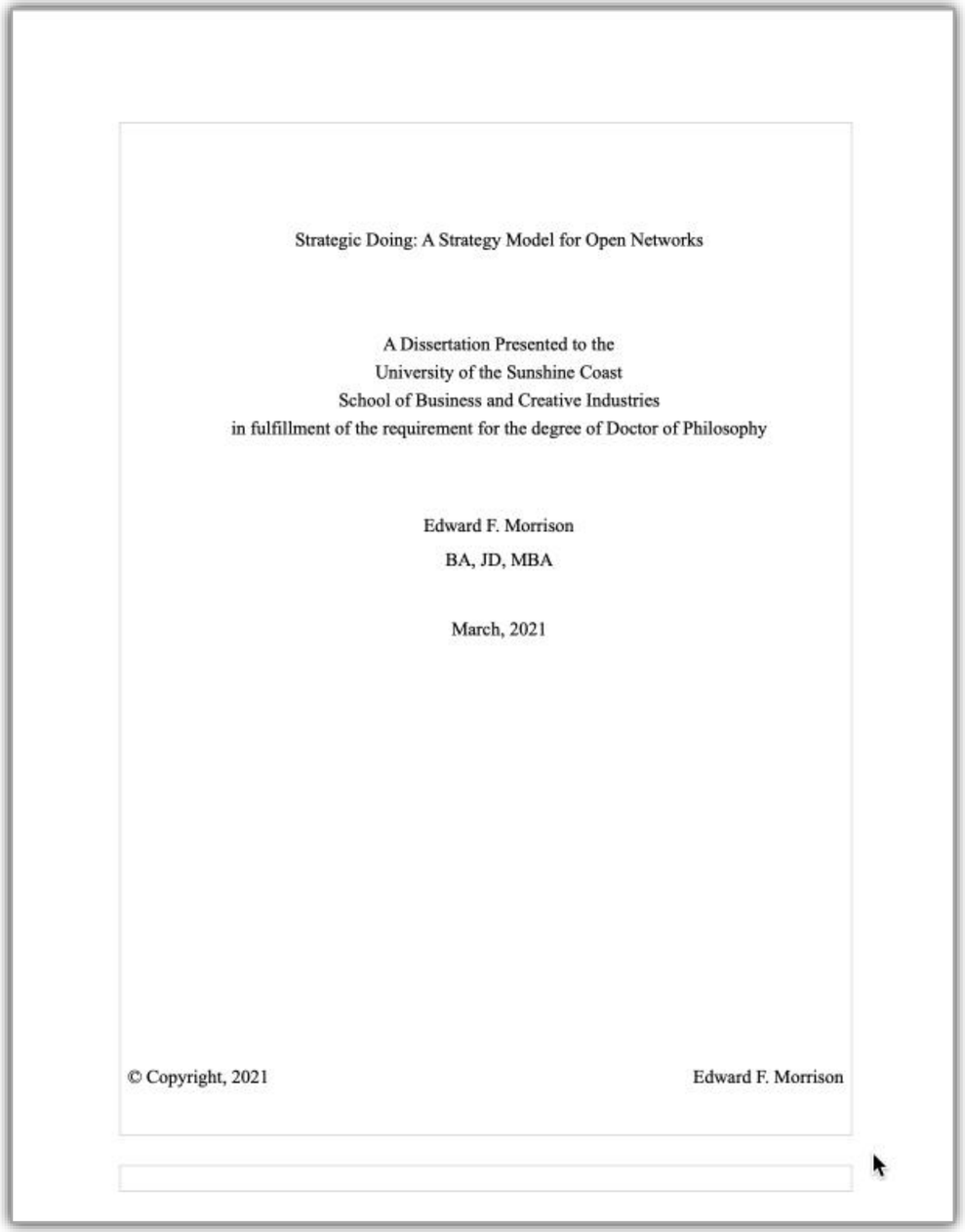
Rule	Description	Core Concepts	Scholarly Research Supporting the Rule
1	Create and maintain a safe space for deep, focused conversation.	Psychological Safety; ba	Edmondson, 1999; Edmondson & Harvey 2017; Nonaka & Konno, 1998; Nonaka et al., 2000
2	Frame of conversation around an appreciative question.	Framing, Appreciative Inquiry	Heifetz & Laurie, 1999; Schön & Rein, 1994
3	Uncover hidden assets that people are willing to share.	Resource-Based View, Knowledge Assets	Penrose & Penrose, 2009; Itami & Roehl 1987
4	Link and leverage these assets to create new opportunities.	Recombinant Innovation; Effectuation	Hargadon, 2003; Sarasvathy 2001
5	Rank all the opportunities to find a "Big Easy".	Strategic Intuition; Paradox theory	Duggan 2007; Lowey & Hod, 2011
6	Convert the "Big Easy" into an outcome with measurable characteristics.	Shared mental models; Prospection	Denzau & North, 1994; Gilbert & Wilson, 207
7	Define at least one Pathfinder Project with guideposts.	Shared mental models, Experimentation	Stout et al., 1999; Sterman, 1994
8	Draft a short term action plan with everyone taking a small step.	Psychological empowerment; Swift trust	Conger & Kanungo, 1988; Zolin, 2006
9	Set a 30/30 meeting to review progress and make adjustments.	Double loop learning	Argyris 1977; Argyris & Schön, 1974; Schön, 1984
10	Nudge, connect, and promote relentlessly to build new habits of collaboration.	Nudge theory, Transition management	Thaler & Sunstein, 2009; Rotmans, 2005

Scholarly research across multiple disciplines explains why the model works

Rule	Description	Core Concepts	Scholarly Research Supporting the Rule
1	Create and maintain a safe space for deep, focused conversation.	Psychological Safety; ba	Edmondson, 1999; Edmondson & Harvey 2017; Nonaka & Konno, 1998; Nonaka et al., 2000
2	Frame of conversation around an appreciative question	Framing, Appreciative Inquiry	Heifetz & Laurie, 1999; Schön & Rein, 1994
3	Uncover hidden assets that people are willing to share.	Resource-Based View, Knowledge Assets	Penrose & Penrose, 2009; Itami & Roehl 1987
4	Link and leverage these assets to create new opportunities.	Recombinant Innovation; Effectuation	Hargadon, 2003; Sarasvathy 2001
5	Rank all the opportunities to find a "Big Easy".	Strategic Intuition; Paradox theory	Duggan 2007; Lowey & Hod, 2011
6	Convert the "Big Easy" into an outcome with measurable characteristics.	Shared mental models; Prospection	Denzau & North, 1994; Gilbert & Wilson, 207
7	Define at least one Pathfinder Project with guideposts.	Shared mental models, Experimentation	Stout et al., 1999; Sterman, 1994
8	Draft a short term action plan with everyone taking a small step.	Psychological empowerment; Swift trust	Conger & Kanungo, 1988; Zolin, 2006
9	Set a 30/30 meeting to review progress and make adjustments.	Double loop learning	Argyris 1977; Argyris & Schön, 1974; Schön, 1984
10	Nudge, connect, and promote relentlessly to build new habits of collaboration.	Nudge theory, Transition management	Thaler & Sunstein, 2009; Rotmans, 2005

Scholarly research across multiple disciplines explains why the model works

Rule	Description	Core Concepts	Scholarly Research Supporting the Rule
1	Create and maintain a safe space for deep, focused conversation.	Psychological Safety; ba	Edmondson, 1999; Edmondson & Harvey 2017; Nonaka & Konno, 1998; Nonaka et al., 2000
2	Frame of conversation around an appreciative question.	Framing, Appreciative Inquiry	Heifetz & Laurie, 1999; Schön & Rein, 1994
3	Uncover hidden assets that people are willing to share.	Resource-Based View, Knowledge Assets	Penrose & Penrose, 2009; Itami & Roehl 1987
4	Link and leverage these assets to create new opportunities.	Recombinant Innovation; Effectuation	Hargadon, 2003; Sarasvathy 2001
5	Rank all the opportunities to find a "Big Easy".	Strategic Intuition; Paradox theory	Duggan 2007; Lowey & Hod, 2011
6	Convert the "Big Easy" into an outcome with measurable characteristics.	Shared mental models; Prospection	Denzau & North, 1994; Gilbert & Wilson, 207
7	Define at least one Pathfinder Project with guideposts.	Shared mental models, Experimentation	Stout et al., 1999; Sterman, 1994
8	Draft a short term action plan with everyone taking a small step.	Psychological empowerment; Swift trust	Conger & Kanungo, 1988; Zolin, 2006
9	Set a 30/30 meeting to review progress and make adjustments.	Double loop learning	Argyris 1977; Argyris & Schön, 1974; Schön, 1984
10	Nudge, connect, and promote relentlessly to build new habits of collaboration.	Nudge theory, Transition management	Thaler & Sunstein, 2009; Rotmans, 2005



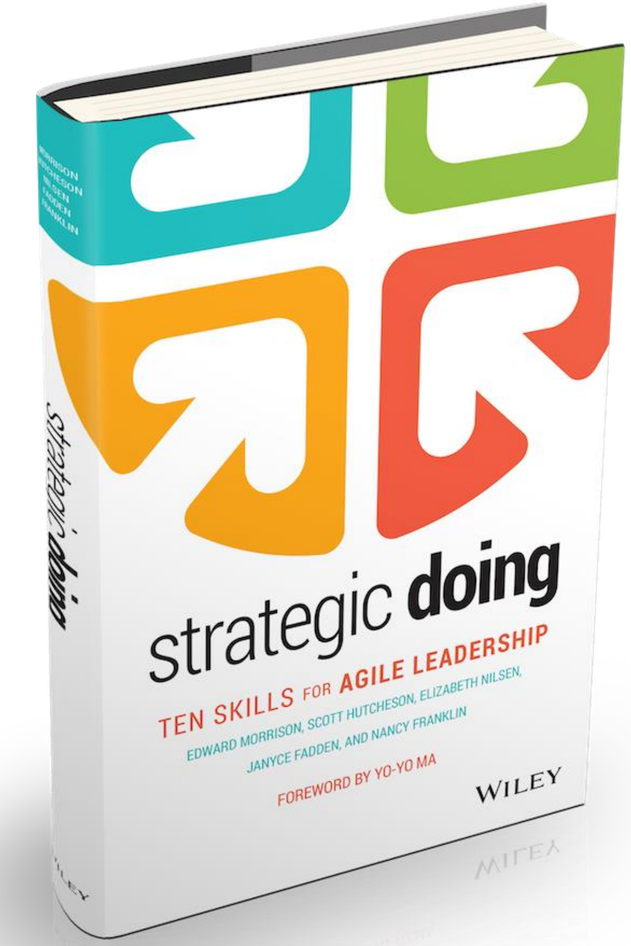
Strategic Doing: A Strategy Model for Open Networks

A Dissertation Presented to the
University of the Sunshine Coast
School of Business and Creative Industries
in fulfillment of the requirement for the degree of Doctor of Philosophy

Edward F. Morrison
BA, JD, MBA

March, 2021

© Copyright, 2021 Edward F. Morrison



Strategic Doing: A Strategy Model for Open Networks

https://bit.ly/PhDMorrison

Strategic Doing™

Do More Together.

战略行动//循环

Strategic Doing // Cycle

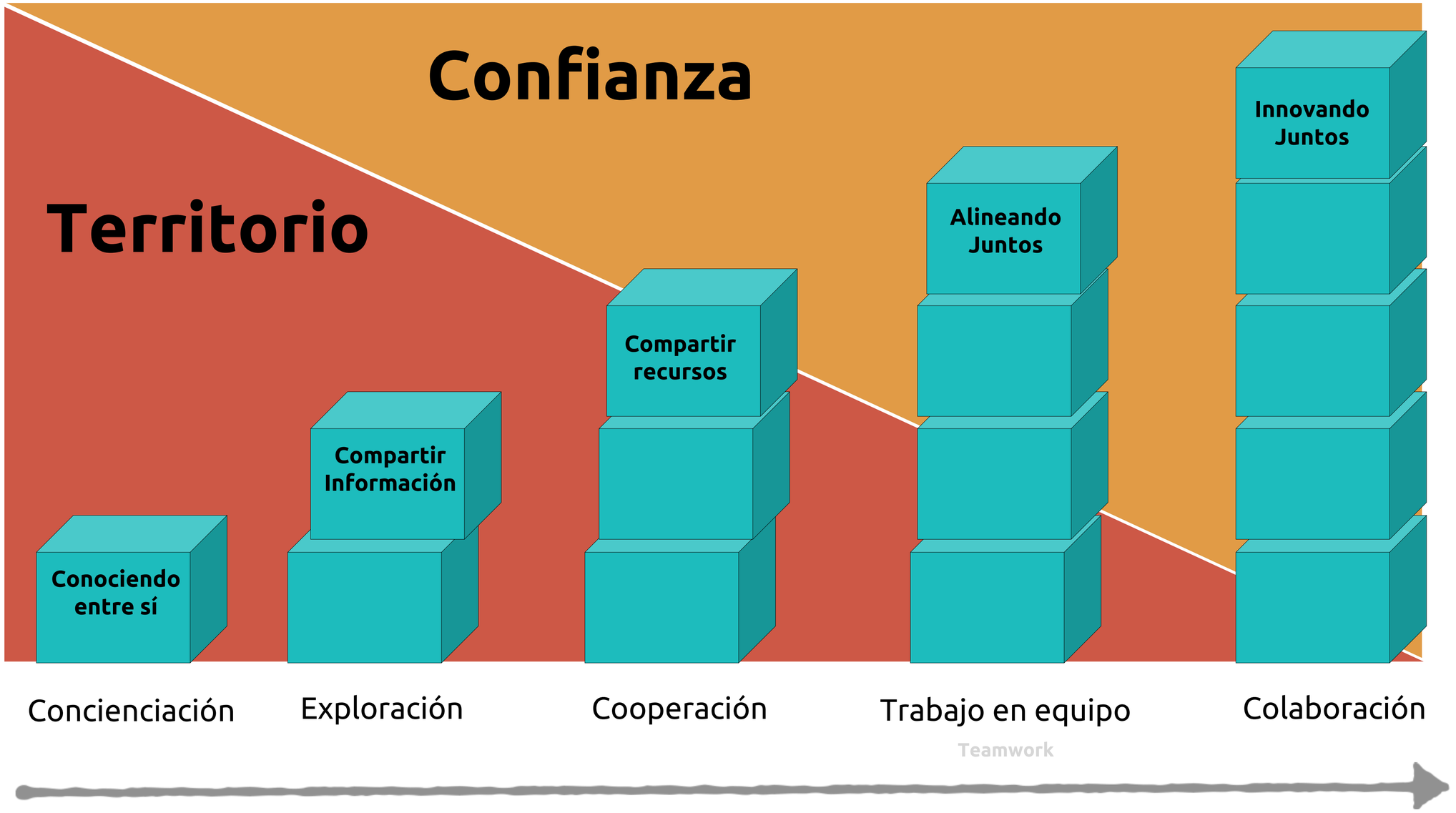
我们能做什么？

我们该做什么？

我们的30/30
是什么

我们将做什么？

La confianza proporciona la energía necesaria para la colaboración, pero tarda en desarrollarse.

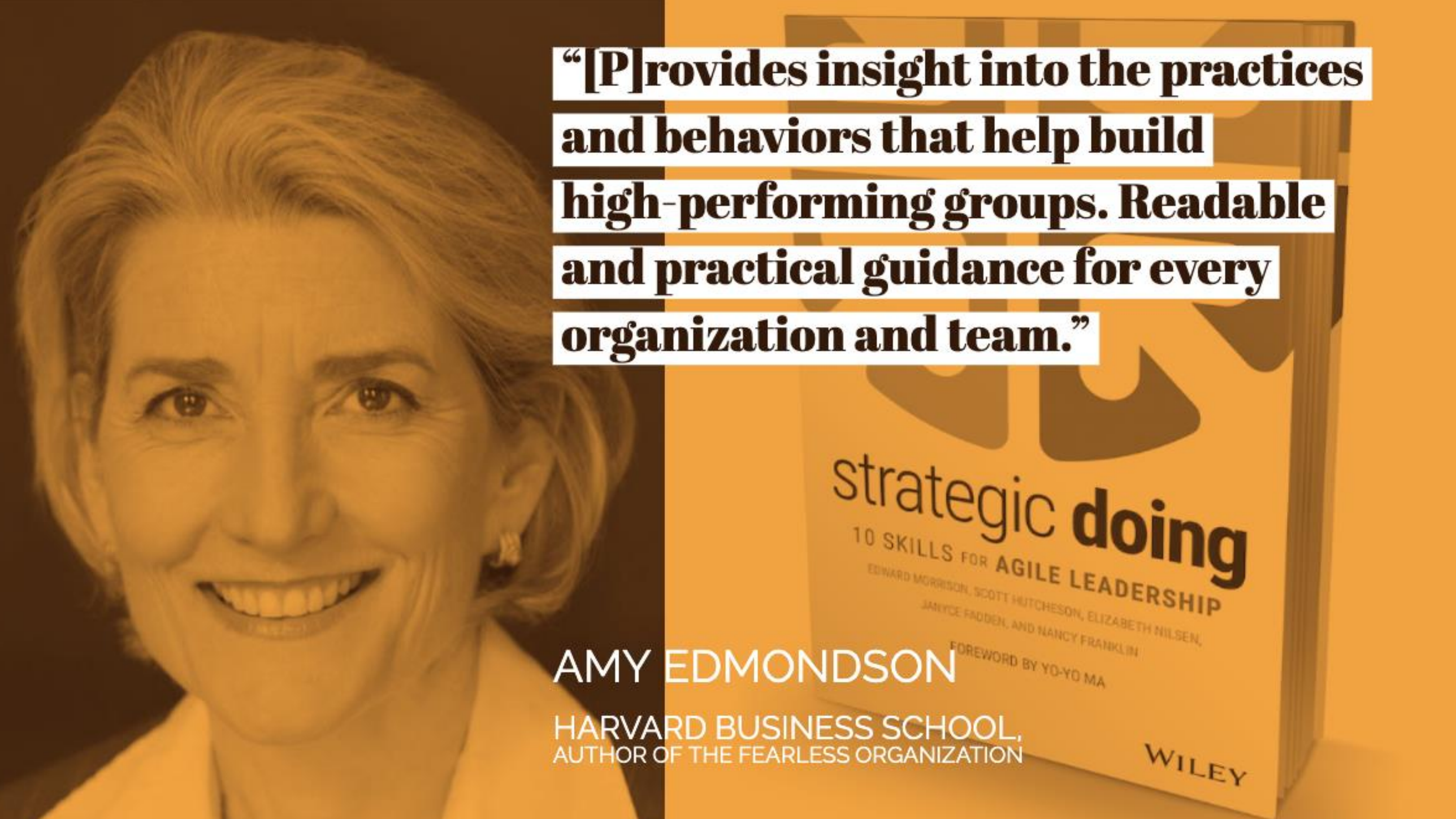


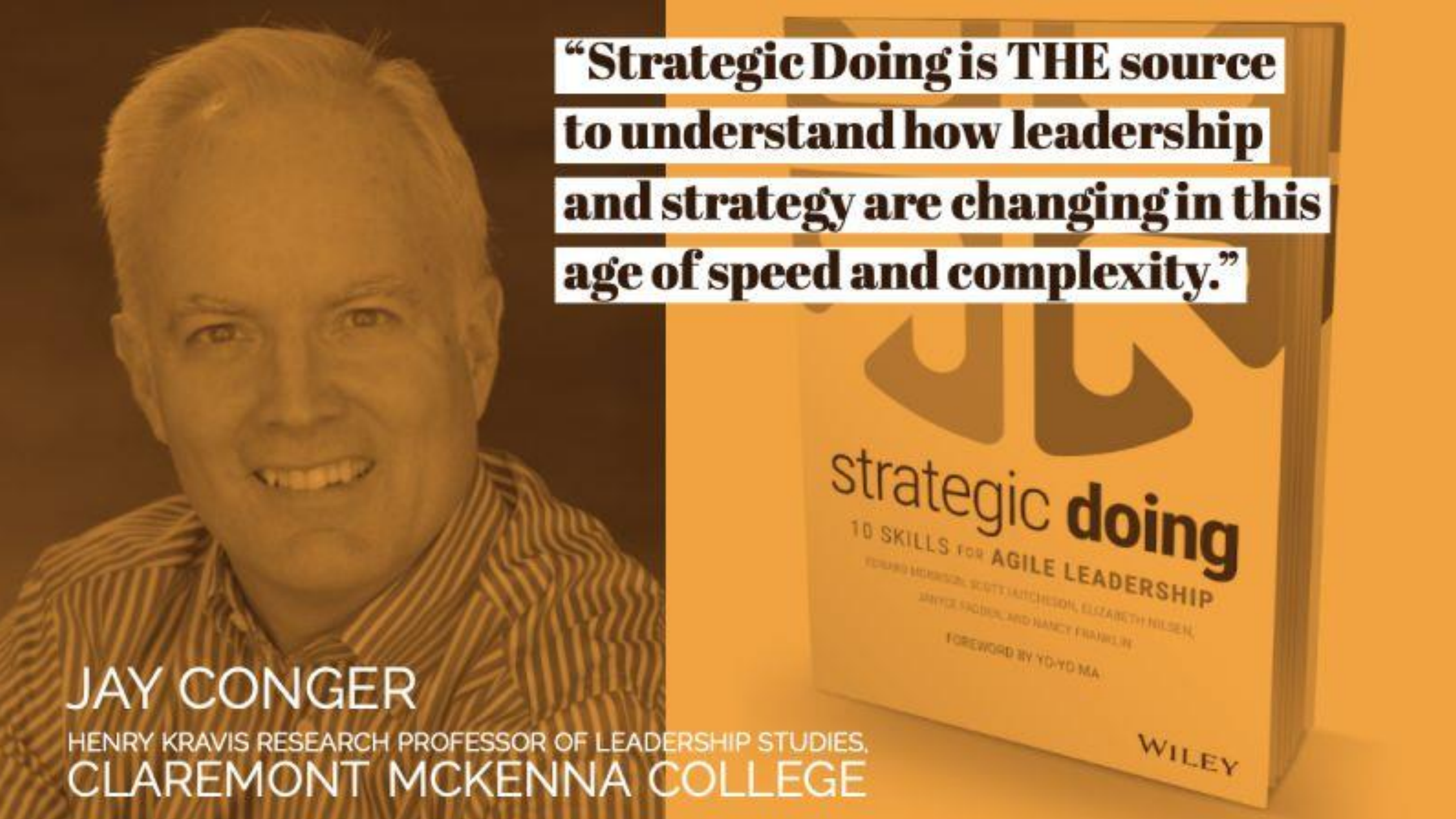
Adapted from Collaboration Continuum from ACT for Youth

Strategic Doing™
Do More Together.

Strategic Doing stelt de volgende vragen:

Some Next Steps


“[P]rovides insight into the practices and behaviors that help build high-performing groups. Readable and practical guidance for every organization and team.”
strategic doing
10 SKILLS FOR AGILE LEADERSHIP
EDWARD MORRISON, SCOTT HUTCHESON, ELIZABETH NILSEN, JANYCE FADDEN, AND NANCY FRANKLIN
FOREWORD BY YO-YO MA
WILEY
AMY EDMONDSON
HARVARD BUSINESS SCHOOL,
AUTHOR OF THE FEARLESS ORGANIZATION


"Strategic Doing is THE source to understand how leadership and strategy are changing in this age of speed and complexity."
JAY CONGER
HENRY KRAVIS RESEARCH PROFESSOR OF LEADERSHIP STUDIES,
CLAREMONT MCKENNA COLLEGE
strategic doing
10 SKILLS FOR AGILE LEADERSHIP
FOREWORD BY YO-YO MA
WILEY

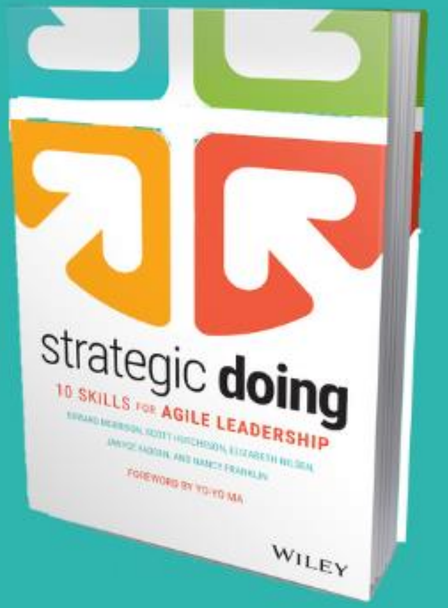
“If you're talking about collaboration, this book provides a foundation"

Ben Amaba
Chief Innovation Officer for IBM
Watson & Cloud Platform

I've been waiting for this book all my life."

YO-YO MA

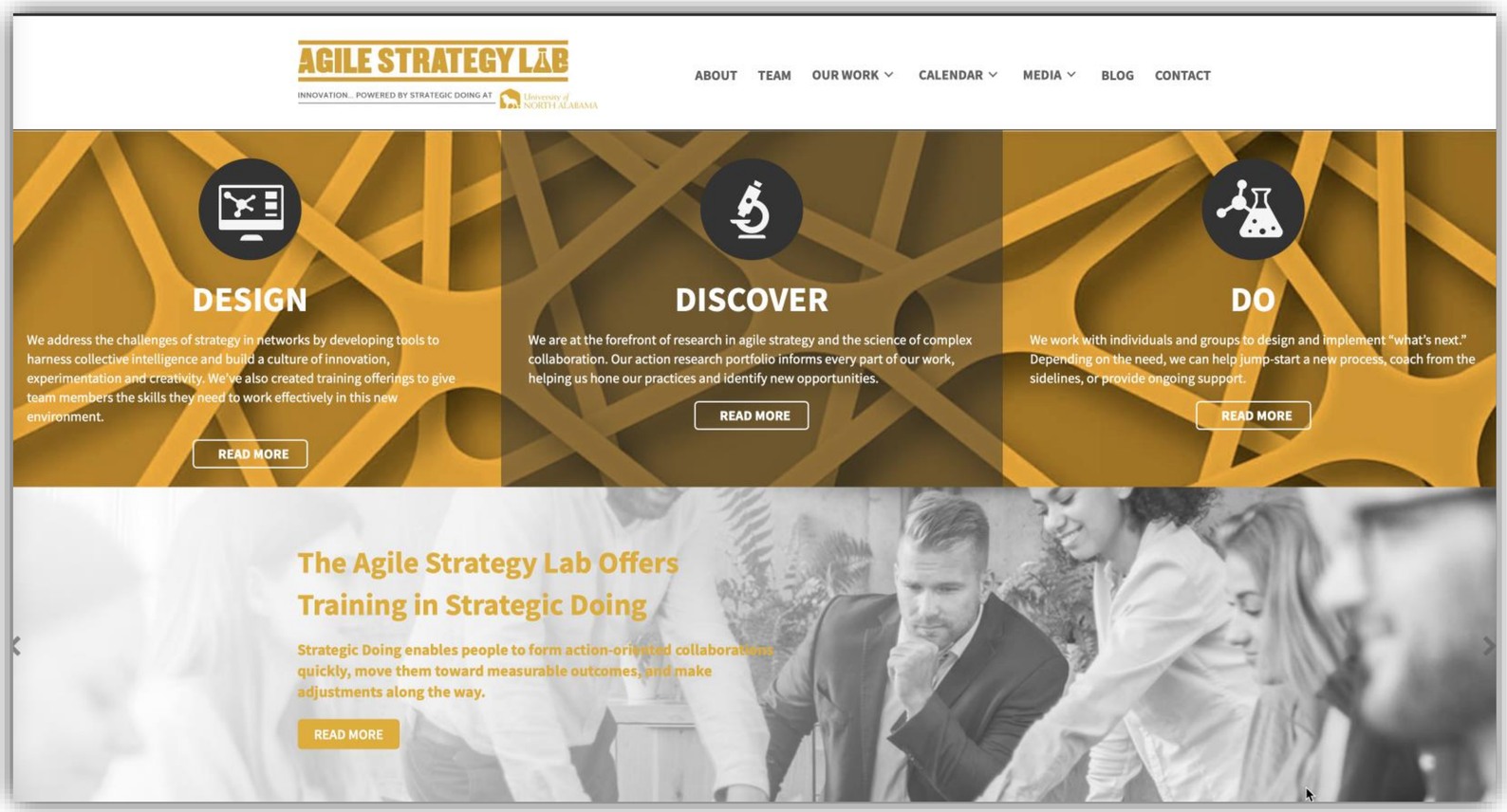
Foreword, Strategic Doing: Ten Skills for Agile Leadership



"We will be the first country in the world to use Strategic Doing at the national and sectoral level to reactivate our industries in the post-pandemic economy "

Julio Jose Prado, PhD
Minister of Trade and Production
Ecuador

Strategic Doing™
Do More Together.

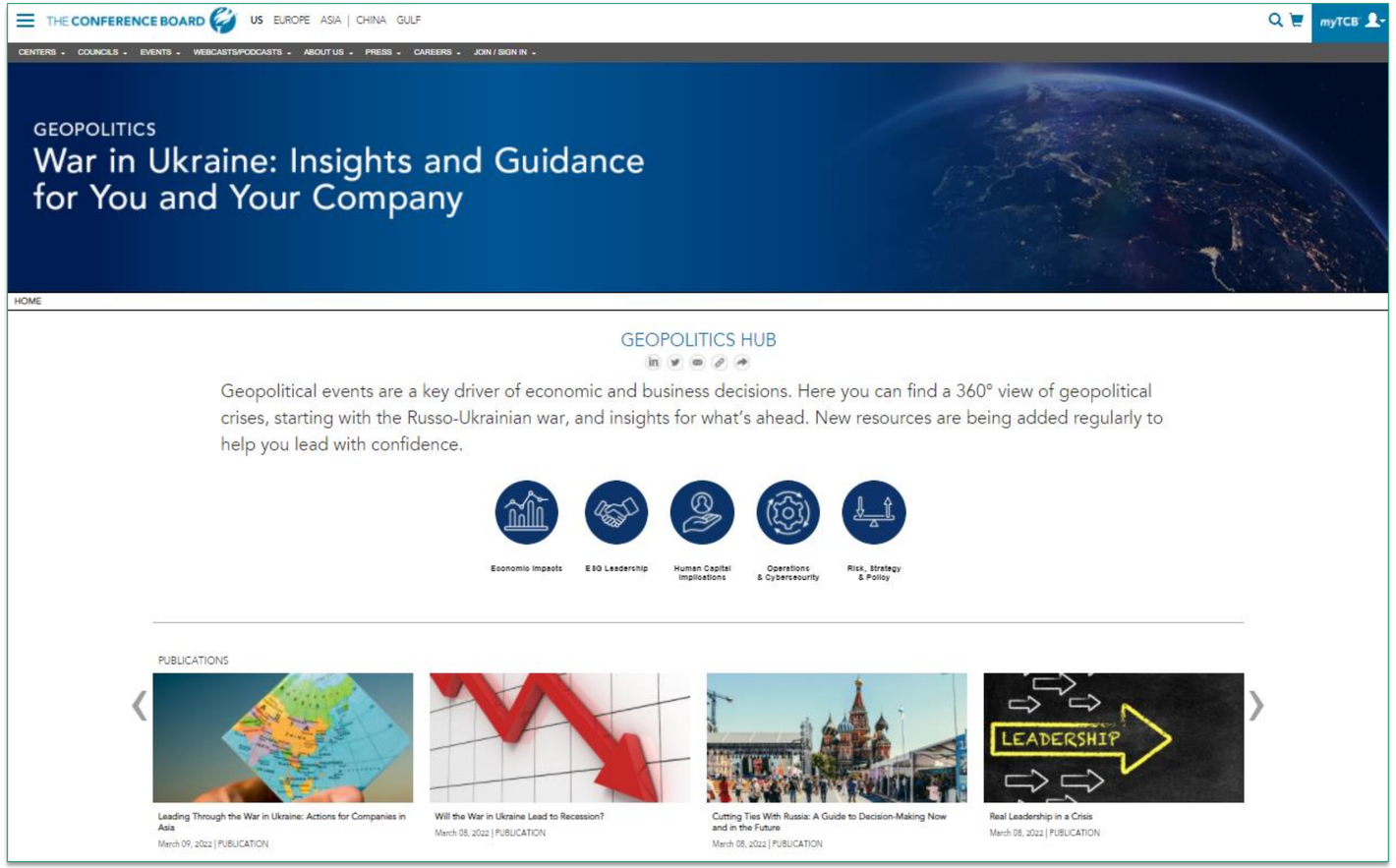


Connect and arrange a briefing

https://bit.ly/ConferenceBoardSD

As the war in Ukraine continues, turn to The Conference Board for daily insights and guidance on what the latest developments mean for you and your company.

www.conference-board.org/topics/geopolitics



© 2022 The Conference Board, Inc. | www.conferenceboard.org