PARTICIPANT GUIDE

Thinking Strategically





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Syllabus



SYLLABUS

COURSE OVERVIEW

Supervisors are the linchpin between strategy and execution, and the top determinant of employee satisfaction in federal agencies. Yet, they are often unprepared for the demands of their role. This course equips participants with the foundational concepts and skills that allow government supervisors to be successful and enable those they manage to perform to their highest potential.

Who Takes This Course

This course is designed for professionals seeking to expand their leadership capabilities.

Learning Objectives

Use strategic thinking to plan and achieve long-term goals

Prerequisites

There are no prerequisites for this course.

COURSE EXPECTATIONS

Required Texts

The following required materials will be issued to each participant and will be used throughout the course.

Management Concepts®, *Thinking Strategically* © [Includes text, appendices, and handouts.]

Access electronic course materials on Student Central at https://managementconcepts.csod.com.

PARTICIPANT GUIDE ICON KEY





Refer to Website



Tip

These icons are used throughout your Participant Guide. Words that are bolded and italicized appear as terms in the Glossary.

Please note that the page numbers of this Participant Guide differ from the page numbers of the Course Delivery Guide used to conduct this class. This is because the Course Delivery Guide contains additional notes and solutions to exercises. Therefore, section numbers are provided along with topic titles to help navigate the course text.

Requirements for Successful Completion

Attendance and Participation

Full (100%) attendance is expected and required. Successful completion of the course depends on full class attendance and active participation in individual and group exercises.

PROFESSIONAL BENEFITS

Many Management Concepts courses are designed to meet the standards and requirements of leading industry organizations. Participants seeking information regarding earned credentials or recognition, such as college and continuing education credit and professional certification, should refer to the certificate of completion issued at the end of the course.



Refer to Website

For additional information about credits and certifications available for Management Concepts courses, please visit:

https://www.managementconcepts.com/Certifications/Professional-Certifications-Training/Certifications-Training

Thinking Strategically



MODULE 1

THINKING STRATEGICALLY

Module Objective

Use strategic thinking to plan and achieve long-term goals

Spend any length of time at an organization and you will undoubtedly hear someone express the need to take a more strategic approach. Broadening our perspective in this way may seem antithetical to the ordinary tasks we need to accomplish. In fast-paced work environments, the daily pressures of our roles often force us to focus narrowly on assignments that require our immediate attention. However, this limited perspective can obscure our ability to see the bigger picture and recognize our influence over those around us. When we are able to expand our thinking to a more strategic level, we are better able to achieve long-term goals and appreciate the impact of our behaviors.

Lessons

- 1. Thinking Approaches
- 2. Developing a Strategic Perspective

LESSON 1

THINKING APPROACHES

Lesson Objective

After completing this lesson, you will be able to:
1.1.1 Analyze the relationship between tactical and strategic thinking

Organizational leaders often discuss a need to be more strategic, but we are generally rewarded for accomplishing work at the tactical level. In meetings, we often try to avoid getting bogged down with unnecessary details, but these details are crucial to ensuring that our work is completed efficiently and effectively. Tactical and strategic thinking provide different perspectives, but these concepts are intertwined and essential to individual and organizational success.

1.1 EXERCISE: TRAINING FOR A MARATHON

Directions

- 1. Read the scenario.
- 2. Working in your group, develop a list of activities to help train for the marathon.
- 3. Be prepared to discuss your plan with the class.



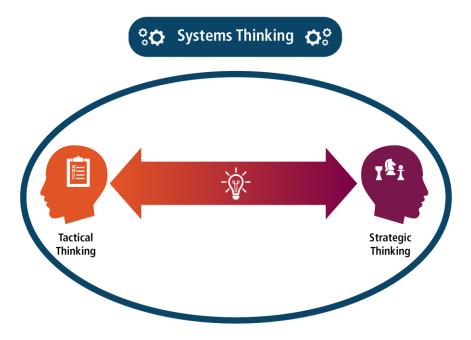
Scenario

After careful consideration, you have decided to undertake the challenge of running your first marathon. Knowing that you have never run 26.2 miles in a single outing before, you have set aside six months to prepare for the race. Today, you would like to compile a list of activities and tasks that you need to accomplish to achieve your goal. You hope that forming this initial plan will help guide your preparation in the coming weeks and months.

Marathon Training Activities

1.2 LEADERSHIP THINKING STYLES

Being a leader requires balance and perspective. In our personal and professional lives, we are tasked with juggling many competing demands. Some tasks require our immediate attention, while others involve goals that are months or even years away. We are expected to finish our individual work on time but we are also impacted by how our colleagues work and behave. Because of this complexity, leaders need to think in different ways given the specific situation.



Systems thinking envelops all tactical and strategic considerations

Effective leaders engage in three levels of thinking:

- Tactical thinking. Thinking that helps accomplish day-to-day work and short-term goals.
- **Strategic thinking.** Broader thinking that considers the long-term implications of actions and interdependencies within a system.
- **Systems thinking.** Holistic thinking that recognizes all the interactions and connections between elements in a system.

1.2.1 Tactical Thinking

Each day, we face a number of specific tasks in our personal and professional lives that *need* to be accomplished. We wake up, brush our teeth, select clothing to wear, commute to work, respond to emails, cook dinner, and complete other daily responsibilities. These moment-to-moment tasks are usually completed using tactical thinking. This type of thinking is essential for completing the routine work that comprises most of our day.

Tactical thinking:

- Helps achieve short-term goals and objectives
- Narrowly focuses on the here-and-now



Tactical thinking helps drive progress, but can also lead to stress when we get stuck in the weeds

- Is often linear, suggesting a clear cause and effect
- Is crucial for organizational success

1.2.2 Strategic Thinking

Beyond the daily requirements of our jobs and lives, we have broader plans for how we want things to be in the future. We have aspirations to get back in shape, save money for a family vacation, work toward a promotion, or learn a new language. These goals require strategic thinking because they cannot be immediately accomplished in the present moment. Strategic thinking requires a broader recognition of all the elements in our environment that will affect our plans for the future. Instead of simply focusing on what exists, strategic thinking allows us to consider what *could* be.



Strategic thinking provides a bird's eye view of the organizational landscape

Strategic thinking:

- Helps with setting and achieving long-term goals
- · Recognizes relationships and interdependencies
- Allows us to better prioritize our work
- Identifies risks and opportunities inherent to our plans
- Allows leaders to better align tactical work to organizational objectives

1.2.3 Systems Thinking

Our actions do not exist in a vacuum. Everything we do, say, and think exists as part of a larger dynamic system that both influences us and is influenced by us. Understanding these ongoing interactions is at the heart of systems thinking. In systems thinking, a person seeks to understand a situation by exploring the different factors, connections, and interactions that shape the entire environment. By considering the interrelationships between all the different components of a system, we can better identify the ripple effects of any individual action.

Ecosystems include all the interrelationships between living and nonliving elements in an environment

Systems thinking:

- Assists with planning and achieving long-term goals
- Incorporates all tactical and strategic considerations
- Recognizes that the whole is more than the sum of its parts
- Considers intangible elements such as beliefs, values, and attitudes
- Allows for more comprehensive solutions, rather than stop-gap measures



Discussion

Imagine you are preparing performance reviews for your team:

- How can you use tactical thinking?
- How can you use strategic thinking?
- What system elements do you need to consider?

1.3 INTERRELATIONSHIP BETWEEN TACTICAL AND STRATEGIC THINKING

While tactical and strategic thinking are distinct ways of thinking, they are strongly interrelated.

TABLE: INTERRELATIONSHIP BETWEEN TACTICAL AND STRATEGIC THINKING

	Length of Time Considered	Reflective Questions	Paradigm	Role
Tactical	Daily, weekly, or monthly intervals	As we think about upcoming days/weeks, what can we do better?	What fires do we need to put out?	Work <i>in</i> the system to accomplish the tasks associated with specific roles
Strategic	Quarterly, annual, or multi-year intervals	 As we look out onto the horizon, what is our destination? What do we need to do to maintain our course? 	What slow-burn, long- term fires do we need to start?	Work <i>on</i> the system to create the roles, direction, and purpose of the group and organization

The table *Interrelationship between Tactical and Strategic Thinking* demonstrates that both tactical and strategic thinking are necessary to successfully achieve goals. Strategic thinking is not inherently better than tactical thinking—leaders and managers need to toggle back and forth between these two ways of thinking. The ultimate challenge is to understand when to make the move from being a tactical thinker to being a strategic thinker.

1.4 EXERCISE: IDENTIFYING USES OF TACTICAL AND STRATEGIC THINKING

Directions

- 1. Working individually, reflect on how you have spent time using tactical and strategic thinking in the past week.
- 2. Document examples (both personal and professional) of how you used tactical and strategic thinking.
- 3. Estimate the percentage of your total time spent using each type.
- 4. Be prepared to share your responses with the class.

Questions

What p	percentage of the time did you use tactical thinking?
	ave you used strategic thinking in the last week?
How ha	ave you used strategic thinking in the last week?
How ha	ave you used strategic thinking in the last week?
How ha	

LESSON 2

DEVELOPING A STRATEGIC PERSPECTIVE

Lesson Objective

After completing this lesson, you will be able to:

1.2.1 Develop a proactive approach to thinking strategically and solving problems

When we categorize someone as a strategic thinker, what do we mean? By examining the characteristics and behaviors that support strategic thinking, we can better understand the elements of our own personality that require the most attention. Improving strategic thinking requires looking inward at our own abilities and behaviors as well as outward at the people, processes, and relationships we influence each day. We must be sure to include strategic considerations in our decision-making and problem-solving efforts.

2.1 EXERCISE: STRATEGIC THINKING CASE STUDY

Directions

- 1. Review the case study.
- 2. Working in your group, identify:
 - Examples of effective strategic thinking from the case study
 - Examples of traits, characteristics, and behaviors that supported strategic thinking
- 3. Be prepared to share your responses with the class.



Case Study: Baseball Manager John McGraw

John McGraw's distinguished major league baseball playing career spanned from 1891 to 1906. McGraw played with the Baltimore Orioles, St. Louis Cardinals, and New York Giants, and produced a career .334 batting average, with 462 runs batted in, and 436 stolen bases. He is best remembered for his 33-year tenure as a major league manager, accumulating 2,763 wins and three World Series championships. He was inducted into the Baseball Hall of Fame in 1937. Many of McGraw's innovations are still seen in professional baseball games.

In the early twentieth century, most baseball teams were managed by player-managers who engaged in minimal planning for games and were viewed as emotional leaders. Managers simply set the lineup and ensured players showed up ready and motivated to play. When teams lost, fans and reporters mostly criticized players' performance, rather than managerial strategy.¹

McGraw redefined expectations of managers by incorporating an unprecedented level of decision-making into his in-game planning. He was one of the first managers to use relief pitchers to finish a game when the starter became fatigued or lost control. While starting pitchers were previously expected to complete the game regardless of their performance, McGraw believed that bringing in a replacement if the original pitcher was ineffective gave his team a better chance to win. Years before baseball statisticians even tracked the concept of the "save," McGraw conferred a great value on the role of relief pitching, a trend that continues to this day.

McGraw was also known for his ability to find and properly place talent within the confines of his preferred system:

- Many managers wanted to fill their rosters with proven veteran players, but McGraw relished opportunities to develop young, inexperienced players (many of whom had never played at the major-league level). Developing homegrown players allowed him to plan two or three years into the future and reduced uncertainty about his personnel.
- McGraw also targeted players who could fit niche roles on his team. He sought out players known for their running speed even if they weren't the most talented player at a given position. This allowed him to substitute pinch runners into pivotal game situations.

McGraw's managerial reach extended beyond tactical in-game decisions. He:

Demanded orderly conduct from his players at all times

¹ James 1997

- Yelled at players who conversed with members of the opposing team or looked distracted in the dugout, and strictly forbade smiling during games
- Enforced an 11:30 p.m. curfew on nights before games
- Criticized his players' eating habits if he deemed their decisions to be unhealthy

Though some saw these behaviors as overbearing, they underscored his commitment to preparation. McGraw believed that baseball games were not simply won and lost on the diamond, but represented all the decisions and work put in before the game even began.

Questions

nat are some examples of traits, characteristics, and behaviors that supported McGraw's ategic thinking?

2.2 CHARACTERISTICS OF STRATEGIC THINKERS

Effective strategic thinkers usually exhibit:

- Strong communication and listening skills
- Emotional intelligence
- Empathetic to the needs and concerns of others
- Ability to use metacognition (thinking about one's thinking)
- Curiosity and willingness to ask questions
- Willingness to think creatively and critically
- Flexibility and open-mindedness in changing circumstances

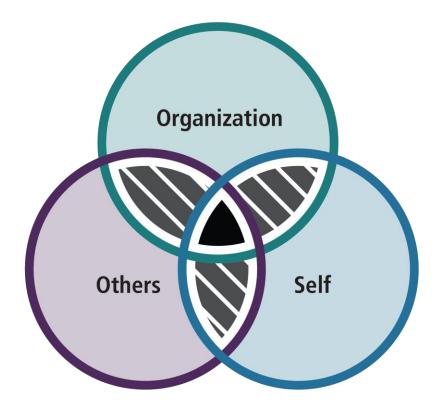


Poll: Characteristics of Strategic Thinkers

Which of these characteristics do you need the most help in developing?

- o Communication and listening skills
- Emotional intelligence
- o Empathy towards the needs and concerns of others
- Application of metacognition
- Curiosity and willingness to ask questions
- Willingness to think creatively and critically
- Flexibility and open-mindedness to change

2.3 STRATEGIC CONSIDERATIONS



Strategic thinking requires understanding the interrelationship between self, others, and the organization

Leaders looking to improve their strategic capabilities need to consider their thinking at three levels:

- **Self.** Strategic thinking requires self-awareness. This involves being in touch with your own tendencies, preferences, and assumptions and how they interact with the system as a whole.
- Others. Our thoughts, feelings, behaviors, and direction have a direct impact on our colleagues. Taking the time to understand their individual tactical and strategic concerns allows us to provide assistance and match our behavior to meet their needs.
- **Organization.** The organization provides the context for how tactical and strategic decisions are made. The overarching goals of the organization inform the tactical and strategic plans for each individual employee.

2.3.1 Broadening Your Perspective

To see your organization's big picture, you first have to step outside of your individual role and recognize how all the different departments within your organization work toward common goals. In a well-aligned organization, the established mission and vision play a direct role in identifying goals and objectives, which then cascade down to team and individual roles and responsibilities. When individuals lack this sense of alignment, it can cause confusion, tension, isolation, and inconsistency. Leaders at all levels must align roles and responsibilities with the organization's mission, vision, and goals.

These elements influence how strategic thinking occurs within an organization:

- **Mission.** The organization's mission is its reason for existence. Most organizations have a mission statement that outlines why the organization exists, what it is meant to do or accomplish, and who it is meant to serve.
- **Vision.** The organizational vision describes what the organization strives to be. Most vision statements illustrate a future state that would result if the organization is successful in achieving its mission. The vision statement is meant to inspire and motivate individuals to help the organization achieve that desired future state.
- **Goals and objectives**. Organizations typically have documented long-term and short-term goals, as well as reasons for why reaching those goals is a valuable endeavor.
- **Climate.** The climate is how you describe individuals' shared perspectives and attitudes about the organizational environment, including how people feel about the organization, levels of satisfaction, and engagement.
- Culture. Culture refers to implicitly shared beliefs, values, traditions, and norms that encourage or discourage certain behaviors.



Example: Mission and Vision Statements

- Federal Emergency Management Agency (FEMA):
 - Mission: Helping people before, during, and after disasters
 - Vision: A prepared and resilient Nation
- Federal Bureau of Investigation (FBI):
 - Mission: Protect the American people and uphold the Constitution of the United States
 - Vision: Ahead of the threat
- Southwest Airlines:
 - Mission: Connect people to what's important in their lives through friendly, reliable, and low-cost air travel
 - Vision: To become the world's most loved, most flown, and most profitable airline



Refer to Websites

Mission and vision information for FEMA, the FBI, and Southwest Airlines is available on their respective websites:

- FEMA: https://www.fema.gov/about/mission
- FBI: https://www.fbi.gov/about/mission
- Southwest Airlines: <u>https://www.southwest.com/html/about-southwest/careers/culture.html</u>

2.4 STRATEGIC THINKING FRAMEWORK

Moving from a tactical to a strategic perspective requires intentionality and discipline. For this reason, it can be helpful to structure our strategic thinking efforts around a formal model.

STRATEGIC THINKING FRAMEWORK



The model emphasizes four elements:

- Team and organizational capacity. Thinking strategically requires leaders to consider the capacity of their team and organization. This is the people side of the framework. Capacity refers to the degree to which people are put in a position to successfully accomplish their work. Capacity is affected by things like turnover, as fewer people are required to work harder in order to make up for the loss of valuable resources. Additionally, this people-oriented lens looks at the knowledge and skills necessary to accomplish the work, both today and in the future.
- Strategic relationships. Building and maintaining strategic relationships involves understanding the environment from your own—and others'—perspectives. It requires understanding others' motivations and needs and being able to forge mutually beneficial relationships. This is done by intentionally and thoughtfully involving others in decision-making to create mutually satisfying results. A leader's ability to build trusting relationships is at the heart of having strategic relationships. A leader must be able to assess different perspectives, interests, wants, and needs, and be able to adapt their approach to build connections with potentially strategic partners.
- Customer focus. Strategic thinking allows you to better understand your customers' needs. These customers can be internal or external to your organization. Customer focus requires reflection about how your team or organization appears to others and the value they derive from it. Whether you offer products, services, or knowledge, you are providing something to someone else. This means customers have expectations about the quality of what they are receiving, the timeliness of delivery, and value it provides.
- Working processes and structures. This lens refers to how the work gets done. Working processes and structures can include everything from how people order supplies, the hiring and selection process for new employees, the way people sign up for training, and how to interact with the IT department when requesting a new computer. All organizational processes in place are encompassed here. Understanding the interconnectedness of processes and structures allows you to make more informed strategic decisions.

Each of these four elements provides a lens for viewing critical strategic considerations in the workplace. The model also emphasizes the interconnectedness of our actions; no individual lens provides a complete strategic perspective. Taken as a whole, this model allows us to think through the situations, both big and small, that are impacted by our strategic thinking and behaviors.

2.4.1 Components of the Framework

Components of the strategic thinking framework elements include:

- Team and organizational capacity:
 - Workforce planning:
 - Organizational culture
 - Talent management, development, and utilization
 - Knowledge management
- Strategic relationships:
 - Partner development and management
 - Coalitions
 - Organizational politics
 - Negotiations

LESSON 2 | DEVELOPING A STRATEGIC PERSPECTIVE

- Customer focus:
 - Customer needs
 - Customer acquisition
 - Customer management
- Working processes and structures:
 - Organizational structure
 - Environment and space
 - Business processes
 - Support tools
 - Technology

2.4.2 EXERCISE: INCORPORATING A STRATEGIC APPROACH

Directions

- 1. Working in your group, identify an organizational problem that requires strategic thinking.
- 2. For each element of the framework, identify three strategic considerations to address the problem.
- 3. Be prepared to share your responses with the class.

Strategic Considerations

1.	Wha	at problem did you identify?
2.	Wha	at three strategic considerations did you identify for team and organizational capacity?
3.	Wha	at three strategic considerations did you identify for strategic relationships?
4.	Wha	at three strategic considerations did you identify for customer focus?
5.	Wha	at three strategic considerations did you identify for working processes and structures?
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MODULE 1 | THINKING STRATEGICALLY

Action Planning

Refer to the Action Plan and record ideas to implement from this module.

Action Plan



RESOURCE A ACTION PLAN

OVERVIEW

Participating in a training course is only the first step to mastering a discipline. In order for your learning to continue, it is important that you put the tools and techniques presented in this course into action.

PART I: KEY LEARNING POINTS

At the end of each module or lesson, time is allotted for you to document ideas that you want to remember.

Module/Lesson Title	Key Learning Points

Module/Lesson Title	Key Learning Points

Module/Lesson Title	Key Learning Points

PART II: ON THE JOB

Review your key learning points and select three to five that you want to implement when you return to your job.

Use the table provided on the next page to:

- Prioritize your implementation items
- Write a SMART objective for each item
 - Specific
 - Measurable
 - Attainable
 - Realistic
 - Time-bound
- Identify the content that supports your objectives
- Document your strategy to achieve your objective
- Set a due date for achievement

Once back on the job, post this action plan in a visible location to remain focused on the completion of these goals.

ACTION PLAN

Objective	Supporting Content	Strategy	Due
	Objective	Objective Supporting Content Supporting Content	Objective Supporting Content Strategy Supporting Content Strategy Supporting Content Strategy Supporting Content Strategy

Presentation Slides



RESOURCE B PRESENTATION SLIDES

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Thinking Strategically	
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Module Objective	
✓ Use strategic thinking to plan and achieve long-term goals	
acilieve long-term goals	
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Thinking Approaches

After completing this lesson, you will be able to:

✓ Analyze the relationship between tactical and strategic thinking

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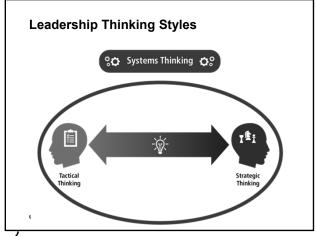
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Exercise: Training for a Marathon

Directions

- 1. Read the scenario.
- 2. Working in your group, develop a list of activities to help train for the marathon.
- 3. Be prepared to discuss your plan with the class.

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Tactical Thinking

- · Helps achieve shortterm goals and objectives
- Narrowly focuses on the here-and-now
- · Is often linear, suggesting clear cause and effect
- · Is crucial for organizational success



7

Strategic Thinking

- Helps with setting and achieving long-term goals
- Recognizes relationships and interdependencies
- Allows us to better prioritize our work
- Identifies risks and opportunities inherent to our plans
- Allows leaders to better align tactical work to organizational objectives



8

Systems Thinking

- · Assists with planning and
- achieving long-term goals Incorporates all tactical and strategic considerations
- Recognizes that the whole is more than the sum of its parts
- Considers intangible elements such as beliefs, values, and attitudes
- Allows for more comprehensive solutions, rather than stop-gap measures



Discussion

Imagine you are preparing performance reviews for your team:

- How can you use tactical thinking?
- · How can you use strategic thinking?
- What system elements do you need to consider?

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Interrelationship between Tactical and Strategic Thinking

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	Length of Time Considered	Reflective Questions	Paradigm	Role
Tactical	Daily, weekly, or monthly intervals	As we think about upcoming days/weeks, what can we do better?	What fires do we need to put out?	Work in the system to accomplish the tasks associated with specific roles
Strategic	Quarterly, annual, or multi-year intervals	As we look out onto the horizon, what is our destination? What do we need to do to maintain our course?	What slow-burn, long-term fires do we need to start?	Work on the system to create the roles, direction, and purpose of the group and organization
11				

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Exercise: Identifying Uses of Tactical and Strategic Thinking

Directions

- Working individually, reflect on how you have spent time using tactical and strategic thinking in the past week.
- Document examples (both personal and professional) of how you used tactical and strategic thinking.
- 3. Estimate the percentage of your total time spent using each type.
- 4. Be prepared to share your responses with the class.

Developing a Strategic Perspective

After completing this lesson, you will be able to:

✓ Develop a proactive approach to thinking strategically and solving problems

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Exercise: Strategic Thinking Case Study

Directions

- 1. Review the case study.
- 2. Working in your group, identify:
 - Examples of effective strategic thinking from the case study
 - Examples of traits, characteristics, and behaviors that supported strategic thinking
- 3.Be prepared to share your responses with the class.

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Characteristics of Strategic Thinkers

- · Strong communication and listening skills
- Emotional intelligence
- Empathetic to the needs and concerns of others
- Ability to use metacognition (thinking about one's thinking)
- · Curiosity and willingness to ask questions
- · Willingness to think creatively and critically
- Flexibility and open-mindedness in changing circumstances

Poll: Characteristics of Strategic Thinkers

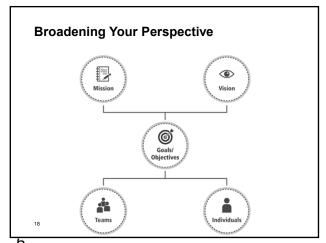
Which of these characteristics do you need the most help in developing?

- o Communication and listening skills
- o Emotional intelligence
- Empathy towards the needs and concerns of others
- o Application of metacognition
- o Curiosity and willingness to ask questions
- o Willingness to think creatively and critically
- o Flexibility and open-mindedness to change

10

16





Strategic Thinking Framework Strategic Thinking Customer Focus Working Team and Processes and Organizational Structures Capacity Strategic Relationships

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Components of the Framework

- Team and organizational capacity:

 — Workforce planning:

 - Organizational culture
 Talent management,
 development, and
 utilization
 - Knowledge management
- Strategic relationships:
 - Partner development and management
- Coalitions
- Organizational politics
- Negotiations

- · Customer focus:
 - Customer needs
 - Customer acquisition
 - Customer management
- Working processes and structures:
 - Organizational structure
 - Environment and space
 - Business processes
 - Support tools
 - Technology

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Exercise: Incorporating a Strategic Approach

Directions

- 1. Working in your group, identify an organizational problem that requires strategic thinking.
- 2. For each element of the framework, identify three strategic considerations to address the problem.
- 3. Be prepared to share your responses with the class.

Bibliography



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James, Bill. 1997. "The Bill James Guide to Baseball Managers." New York: Diversion Publishing.