

The art of strategy

A template and thought process for problem solving

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Strategy is not a document.
It's thought.

Strategos: n. greek: the general

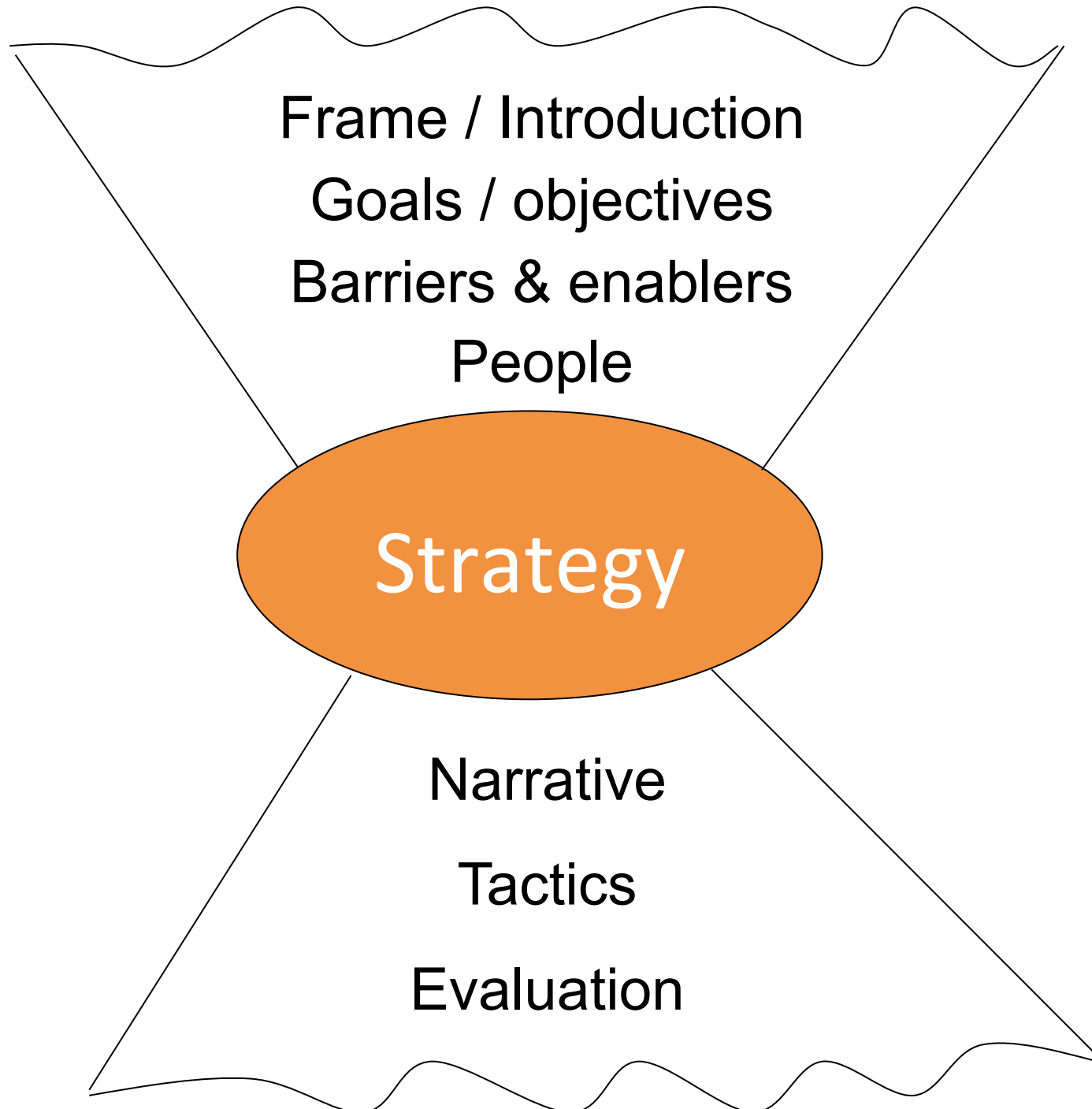
The general on the hill can see the sand, the trees,
the tundra, the enemy -
and decide how to use resources accordingly

Ancient origins: Sun Tsu

Victory belongs to the side
that scores the most in temple calculations
before the battle.

Beware the template

Victorious campaigns are unrepeatable.
They take form in response
to the infinite varieties of the circumstance.

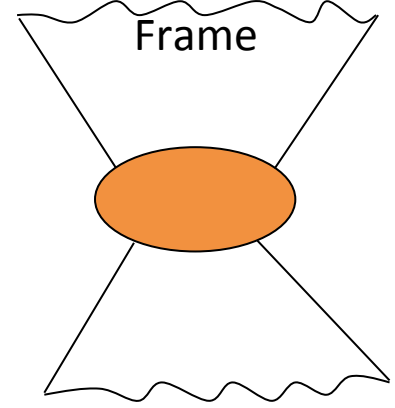


Problem

Solution

Frame: what are we doing here?

- Be utterly clear about the purpose of this strategy, this thought process, this document
- Establish the situation that has led to needing a communication strategy
- Be clear about what we're NOT trying to solve, and what is NOT in scope
- Don't go into contextual detail: that's for the barriers / enablers section
- Consider SCQA

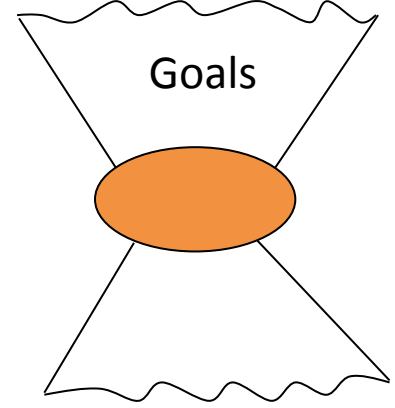


SCQA

- Situation** Portchester Consulting has created a Strategy Template that it wishes to share with members of the communication community.
- Complication** But some communication professionals believe strategy cannot be templated, and that creating a template presents a risk that practitioners will take shortcuts in their thinking.
- Question** Should Portchester share its template, and if so, how can it do so in a way that promotes stronger strategic thinking, rather than shortcuts?
- Answer** This paper examines the factors that are important in this context, and proposes an approach to sharing the template safely.

Goals / objectives:

What does success look like?



Do:

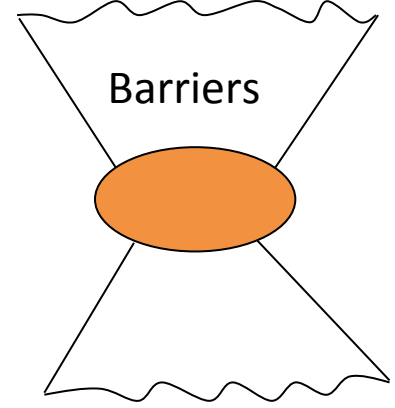
- Align to business objectives
- Make them measurable
- Review them repeatedly through the process to get them right

Don't:

- Write tactics as objectives
- Have a big list

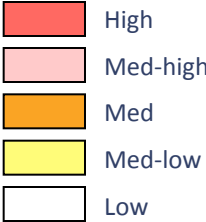
Barriers and enablers:

What could stop us? What could help us?



- Be comprehensive in exploring factors that affect ability to succeed
- “Notice the universe” then prioritise and create meaning
- Group them and make sense of them
- Use tools like SWOT & PESTLE to help

Making sense of the situation



Risks/opportunities

- 1 x
- 2 x
- 3 x
- 4 x
- 5 x
- 6 x
- 7 x
- 8 x
- 9 x
- 10 x
- 11 x
- 12 x

Impact

Catastrophic	Med	Med-high	High	High	High
Major	Med-low	Med	Med-high	High	High
Moderate	Low	Med-low	Med	Med-high	High
Minor	Low	Low	Med-low	Med	Med-high
Insignificant	Low	Low	Low	Med-low	Med

Very unlikely Unlikely Possible Likely Almost certain

Likelihood

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12

Barriers and enablers: one approach

Risk / opportunity	Response
Disrespect to educators Launching a template could undermine educators who have previously advised against it	Meet and talk to ensure concerns are understood. Share approach and ask for feedback.
Misuse of template People could use it to “tick boxes” rather than as it’s intended	Difficult to avoid, even if template is presented with clear “thinking” guidance. Ensure the guidance is front and centre in all engagements
Better discourse The template and sharing of it could prompt better discourse about strategy writing and thinking	Embrace imperfection and encourage conversation

People:

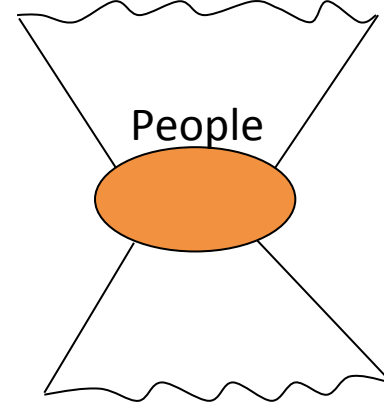
Who matters to us? And what matters to them?

Do:

- “Notice the universe” then organise and prioritise
- Analyse and interpret
- Use research and data to validate claims & shed light

Don't:

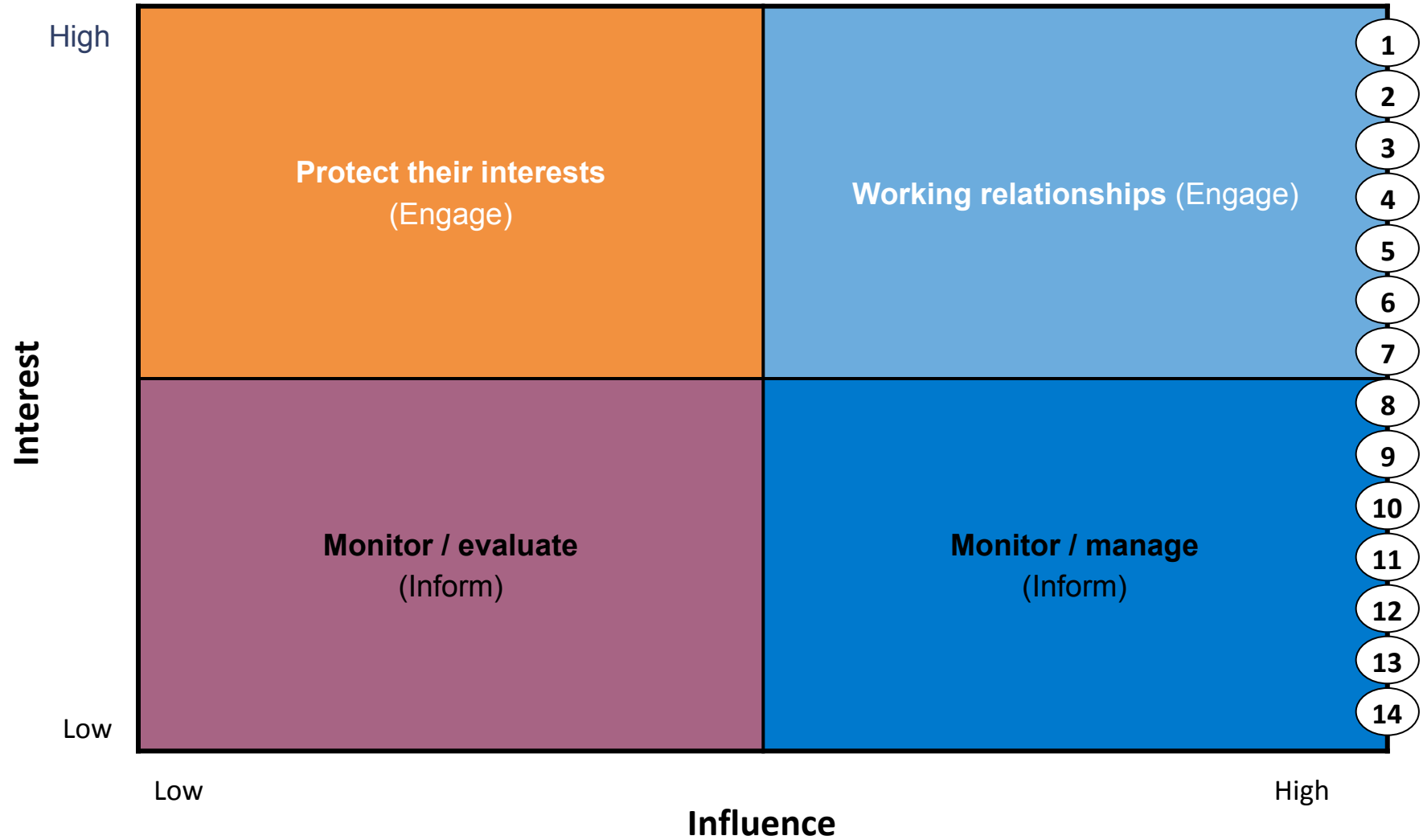
- Just make a list
- Be too constrained in your early thinking – or too broad in your final thinking
- Make assumptions about their needs and values



Making sense of people

Person / group

- 1 x
- 2 x
- 3 x
- 4 x
- 5 x
- 6 x
- 7 x
- 8 x
- 9 x
- 10 x
- 11 x
- 12 x
- 13 x
- 14 x



NOT this

Audiences

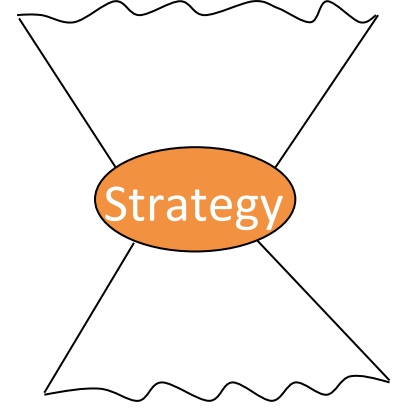
- Comms educators
- Strategy experts
- PRINZ
- Public sector communicators
- CCC
- IABC
- Communication teams
- Communication managers

One approach

Audience group	What they care about	Considerations
Communication educators	Care about good communication practice; May be concerned about misuse of template	Need to listen to their concerns; be prepared to change approach
Communication practitioners	Want help with strategy Believe a template will help May be tempted to short cut thinking	Balance easy to use template with emphasis that template is not a substitute for thinking
Communication groups	Want good content for their members Are expert in their member needs and beliefs Can be a conduit for sharing tools and templates	Engage to understand needs

Strategy:

What is the solution to the problem?

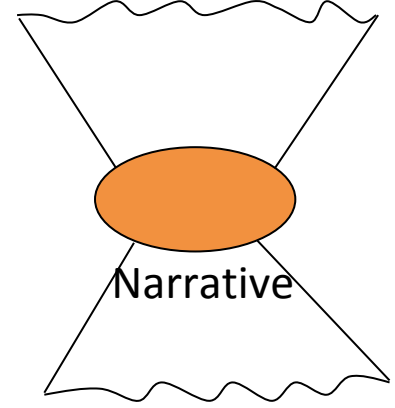


Ask:

- How will we solve our problem?
- What is the organising framework we'll use to determine our tactics?
- Does this help us make decisions about what to do – and what not to do?
- Do the tactics I'm considering fit this strategy?
- Will the strategy help us achieve the goals?

Narrative:

What's the right story for this time?



Do:

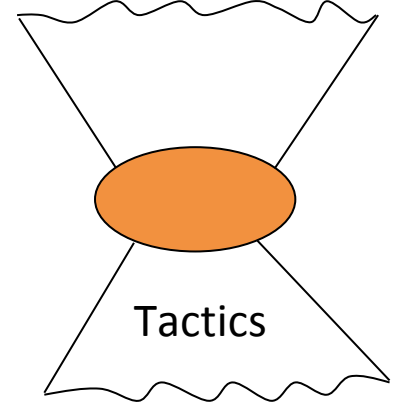
- Succinctly reflect the story you need to tell, to execute the strategy
- Be honest
- Be elegant, concise, compelling
- Keep it short

Don't:

- Write a list of bullet pointed messages

Tactics:

What are we going to do?



Consider:

- What do we need to do?
- How will we implement the strategy?
- What's the timeframe, and what are the priorities?
- Do we *really* need to do [x]?
- To use an America's Cup metaphor, will it "make the boat go faster"?

Evaluation:

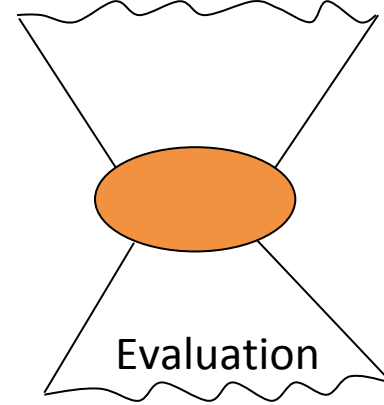
How will we know if it worked?

Do:

- Align with the objectives
- Consider output and outcome measures
- Match evaluation to budget

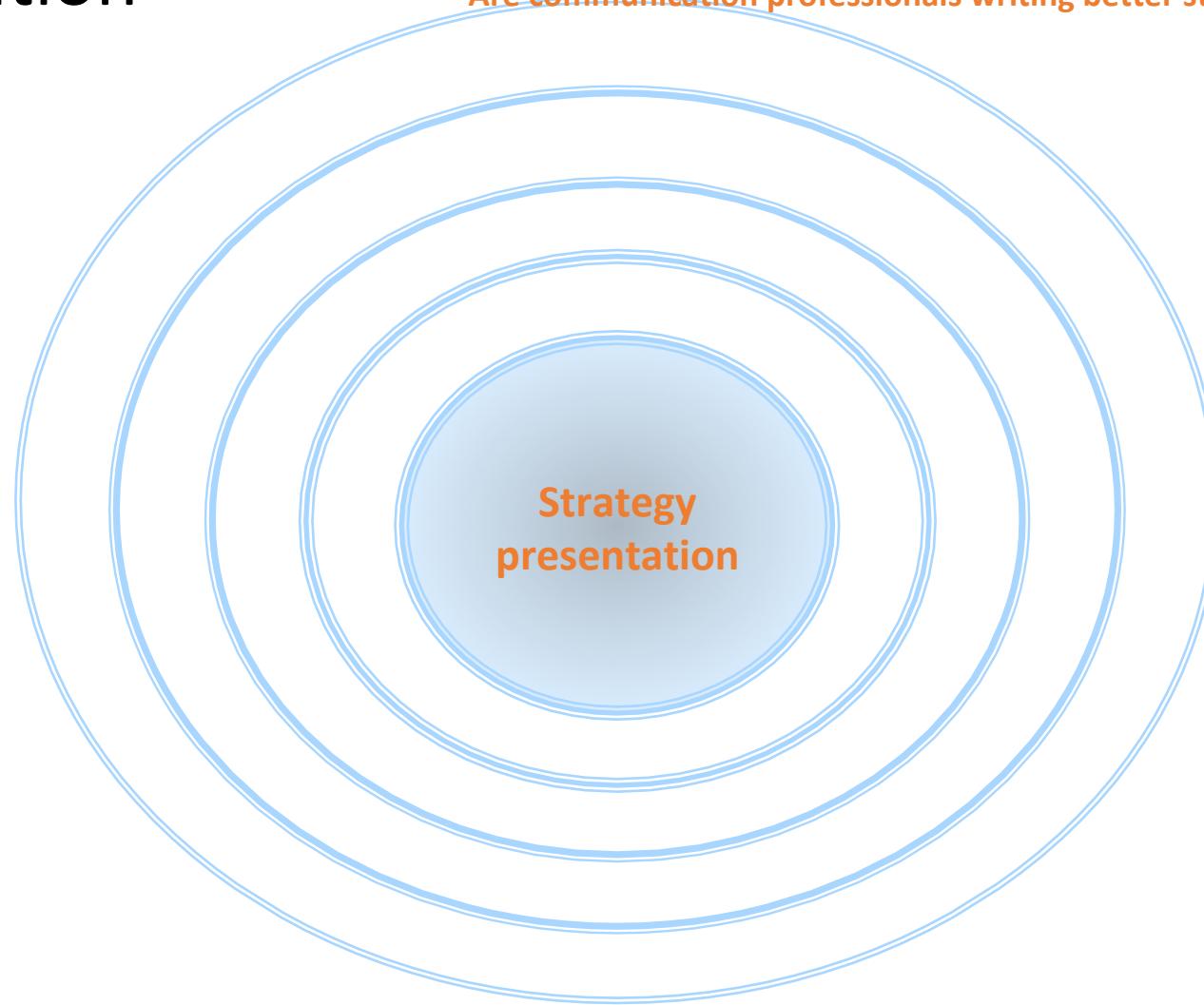
Don't:

- Do it if you don't know how you'd measure it
- Try to measure everything
- End up measuring nothing



Layers of evaluation

Are communication professionals writing better strategies?



Evaluation: one approach

Outcome	Indicators	Measured how
Better strategy	Communication professionals are producing strategies that genuinely solve communication problems	Stakeholder survey shows improved satisfaction Sample review shows improvement against benchmark
Better conversations	Communication professionals are participating in helpful conversations within the community to support each other and develop	Anecdotal feedback Number of responses and approaches Social media engagement
Elevated profession	Better reputation for communication profession	Annual measures show improved reputation amongst senior management

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that scores the most in temple calculations
before the battle.

✧ **Be restless**

Don't be satisfied with your first thought
Amend and revise so it's internally coherent

✧ **Be curious**

Ask why, and what else, and what if?

✧ **Be logical**

Test ALL the assumptions
Group, prioritise and analyse

✧ **Be creative**

Imagine possible solutions
Always reach for meaning



Thank you!