

Strategic Doing

10 Skills for Agile Leadership

by Edward Morrison, Scott Hutcheson, Elizabeth Nilsen, Janyce Fadden, and Nancy Franklin



Contents

You Are Here

Page 2

Skill 2: Frame the Conversation with the Right Question

Page 3

Skill 4: Link and Leverage Assets to Identify New Opportunities

Page 4

Skill 5: Look for the Big Easy

Page 4

Skill 7: Start Slowly to Go Fast--But Start

Page 6

Skill 10: Nudge, Connect, and Promote to Reinforce New Habits

Page 7

THE SUMMARY IN BRIEF

Complex challenges are all around us—they impact our companies, our communities, and our planet. This complexity and the emergence of networks is changing the practice of strategic management. Today's leaders need to understand how to design and guide effective collaborations to accelerate innovation and change—collaborations that cross boundaries both inside and outside organizations.

Strategic Doing offers an important guide to navigating this new world. Designed to be practical, the book introduces 10 skills that anyone can learn. The skills have been successfully adopted by executives, managers, university administrators, government officials, students, community leaders, and others from a variety of disciplines.

Solidly based in research, *Strategic Doing* explains each of the skills in detail and clearly illustrates how individual skills are used as part of an effective collaboration. *Strategic Doing* outlines a new discipline of leadership strategy specifically designed for open, loosely connected networks.

IN THIS SUMMARY, YOU WILL LEARN:

- How the 10 skills address the prevalence of networks in the world today.
- To identify, link, and leverage your group's assets.
- Why you need to start slow to go fast.
- How to make the 10 skills into habits that lead to real change.

You Are Here

Companies face complexity every day. How do they make their organizations more agile? Rapid changes in consumer demand, technologies, regulations, and competition put a premium on the ability to respond and adapt quickly.

The fact is that we are becoming overwhelmed by challenges in complex systems, but many of us are approaching the challenges with disciplines and mindsets developed decades ago.

What exactly has changed? Very few things in our complex world can be accomplished by a single individual or company working in isolation. Networks are all around us and have become the primary organizing structure behind most of the goods we buy, the services we use, and the places we work, live, and play.

A network has several important characteristics: It forms around a set of assets, or resources. These assets might take many forms: a physical location, a particular technology, even an intangible set of ideas that people hold in common. There is usually a set of people who are particularly closely related to the hub. There are other people who are more loosely connected. The network is never static. The boundary dividing who is “in” and who is “out” of the network is a porous one. There is no “top” or “bottom” to a network. And there is no one individual or entity that can give directions for the members to carry out.

There are different kinds of networks, but here the focus is on an innovating network. These networks are composed of people who have joined forces to create new value together.

An interesting example of an innovating network is the group of companies that came together to create what we think of as the product of a single company—the iPod. While Apple was certainly at the center of the network, dozens of other companies had a hand in its birth, including hardware parts manufacturers, music distributors, accessory designers, and more. Apple founder Steve Jobs may have been a genius, but part of his particular legerdemain was in assembling the right collection of partners to bring the iPod to market.

Hierarchies, Networks, and Strategy

The hierarchy and the network have very different implications for thinking about strategy. In a hierarchy, the challenge is to communicate information about what to do “down” and to get information about the results “up.” In a network, on the other hand, the challenge is to get the members’ resources and efforts aligned toward a chosen

objective. This is a key difference and necessitates thinking about “doing” strategy very differently.

To effectively use the tools of strategy in a networked world, we need to change three things:

We need to think differently. In a complex environment characterized by networks, it’s simply not possible for one individual to develop effective strategy. Strategy has to be a team effort, and the more complex the environment, the larger the network that will need to be engaged.

We need to behave differently. In genuine collaboration, trust has to be high and turf low. Trust is established when words and actions align. Rules of civility are one important component of establishing an environment where trust can flourish. We also need to balance two dimensions: guidance and participation.

We need to “do” differently. Thinking differently and behaving differently “set the table” for the third thing that needs to happen in order for companies, organizations, or communities to successfully navigate challenges—doing differently.

The following 10 skills break that “doing” down into specific components that are simple to understand and put into practice. They are not, however, a “one-and-done” formula. Change is constant. The doing differently needs to become a permanent way of working—a set of habits.

The skills are simple but not easy; they require practice and attention to master. The real power of the skills is in combining them—perhaps not all 10 at any one time but identifying the skills most called for in a particular situation. The whole is truly more than the sum of its parts.

Skill 1: Create and Maintain a Safe Space for Deep, Focused Conversation

Increasing the productivity of groups and teams begins with increasing the productivity of their conversations. One of the ways to assure deep, focused group conversations is to pay attention to the size of the group having the conversation.

In *Decide & Deliver: 5 Steps to Breakthrough Performance in your Organization*, Marcia Blenko and her co-authors contend that the ideal group size is seven and that every person beyond seven reduced the team’s effectiveness by 10 percent, so that when a group gets to about 17 members, about all they can do is make a decision about when to take a lunch break. Others have advocated for a slightly smaller size.

Good framing questions are adaptive questions.
By their nature they seem big, bold, and inspiring.

In communities, it is especially important to pay attention to the local context when deciding where to have strategic conversations. The library is often a safe space for strategic conversations about civic issues. A library has some basic rules of behavior, and usually there's no such thing as a dumb question at the library.

The notion of safe behavior is equally important—a safe space in which everyone can participate. A go-to rule of civility is this: “We will behave in ways that build trust and mutual respect.” It is not only the role of the agile leader to communicate and reinforce this rule, it is a shared responsibility among those having the conversation.

When bringing together a small group or team for a strategic conversation, explain that when individuals work together in groups, there is evidence that the best outcomes occur in groups that have the greatest levels of “equity of voice.” This means that when they meet together, every member talks for about the same amount of time. Simply letting group members know that you'll be striving for equity of voice can be quite powerful.

Skill 2: Frame the Conversation with the Right Question

The second skill of agile leadership is to design a conversation around an appreciative framing question, a question with many answers that will move the conversation in a positive direction. A good framing question is complex enough that it will require the deeper thinking and engagement of each person in the conversation.

Adaptive questions point us to challenges for which there are no clear answers. Adaptive questions can trigger many answers that might all lead to acceptable solutions. “How do we become the employer of choice in our industry?” “What is the best way to respond to a new technology that can erode our market position quickly?” Each of these examples have many possible answers, and each solution could contribute to that answer.

Good framing questions are adaptive questions. By their

nature they seem big, bold, and inspiring. They grab the listener who wants to know more about how it will be accomplished and how they can be part of the solution.

Appreciative Inquiry

Moreover, when we choose to seek out what is already good and right about an individual, team, or organization, then we have chosen an approach called Appreciative Inquiry. This approach is asset-based—positively focused rather than deficit-focused.

A company might be asked to consider this question: “What can we do to minimize customer anger and complaints?” This is an example of a nonappreciative question. It highlights what is clearly an issue for the organization asking it, but the group will work together more productively by considering a different question: “When have customers been most pleased with our service and what might we learn and apply from those moments of success?” The overall focus of the inquiry is on what the organization wants more of, not less.

By asking the right question—an appreciative one that allows for many perspectives on an adaptive challenge—agile leaders draw people into a deeper, more-focused conversation that can lead to many new opportunities.

Skill 3: Identify Your Assets, Including the Hidden ones

Many people operate in “If Only Land.” Every time they are part of a conversation, they are quick to bring up what they wish they had—a better job, a nicer home, more well-behaved children. Companies and organizations aren't much different. If you could listen in on their meetings, you'd hear statements like, “If only we hadn't missed that opportunity . . . If only we had more money . . . If only other countries didn't have such low labor costs.”

In network thinking, there is no top or bottom. We may still need resources, but there is no one whose job it is to give them to us. We need first to take stock of the resources we already have. We have resources all around us that can be used in new and different ways.

Assets: More Than Cash

Assets come in many different varieties and go far beyond cash. Physical and natural assets include things like real estate (land or buildings), meeting spaces, water rights, classrooms, large or specialized equipment, or high-speed fiber. Skill and knowledge assets could include skills in writing, graphic design, public speaking, budgeting, website construction, research, or cooking, among many others.

Social assets are individual people or groups of people with whom someone in your network is personally acquainted. Capital assets are financial resources or assets that otherwise would be bought, such as editorial space in a newspaper for an opinion column, or administrative support that someone could donate to the cause.

Many assets are hidden—sometimes there is no one else in the group with any idea that the person has that asset. Some of our assets are hidden even from ourselves—it takes another person to draw them out and identify the value they can have to the group. Common hidden assets are hobbies, skills, or interests someone has pursued independently over the years.

You may feel that the assets you and your colleagues can contribute to an adaptive challenge are just not sufficient. This is in some ways true—you don't have everything you need. However, the flip side of this disadvantage is a powerful truth: because you are only working with what you have, you can start work right now. You don't need permission. You are free to move ahead. As you'll see, something almost magical happens when you seize the opportunities available to you.

Skill 4: Link and Leverage Assets to Identify New Opportunities

Agile leaders not only uncover hidden assets; they also see how different assets could be linked, leveraged, and aligned, and can help others see that potential as well. A mere list of assets is not enough. The magic happens when assets get combined. Making these kinds of connections is useful in many contexts but is critical in a network (rather than a hierarchy)—it provides the platform from which collective solutions to our most complex challenges will emerge.

Here's an example from the world of technology: GPS, or global positioning systems, are a remarkable innovation that link, leverage, and align satellite technology with atomic clock technology with radio transmitter and receiver technology. Those technologies were separate assets, bodies of knowledge

in different experts' heads. The assets didn't align themselves automatically. When someone (probably a group of someones) wondered, "What if we combined them?," a breakthrough in modern navigation was imminent.

Many of us have a natural tendency to think vertically—that is, to explore specific topics in depth. It is also, however, helpful to think horizontally, across different disciplines, fields, or bodies of knowledge. New insights can occur when we think horizontally.

Horizontal Thinking: Healthcare Engineering

At Purdue University, for example, there is a group called the Regenstrief Center for Healthcare Engineering (RCHE). Here horizontal thinking resulted in the idea for RCHE, in response to the appreciative question, "How might we improve the healthcare system by bringing engineers together with nurses and pharmacists?" Healthcare engineering as a field of practice and research was born.

For example, infusion pumps hang by the bedside in a hospital and deliver fluids, such as nutrients and medications, into a patient's body. While these pumps provide a high degree of accuracy in the delivery of medications, there are also significant safety problems. Malfunctions can result in the over-delivery or under-delivery of medication. RCHE has established the infusion pump informatics community of practice among more than 100 hospitals in the Midwest. Through a web-based tool, these hospitals can now share data, analysis, and best practices to improve patient safety.

Let's say a group of five to seven individuals has been tasked with designing a strategy to address a complex issue. If each person identifies five assets, the group then has 25 to 30 assets in their collective asset inventory. Mixing and matching different combinations of these assets to form potential solutions gives us a nearly endless set of possibilities.

Devote some time to simply brainstorming new possibilities from combining the assets you have at your disposal—if you're stuck, pick out a few at random and ask, "What if we combined these?" "What about these?" With even a few assets, the number of possibilities you can create will surprise you.

Skill 5: Look for the Big Easy

To develop and implement an effective strategy, we must move at least one of our ideas to action. The reason is simple: Our resources are limited. Often teams can get stuck at this point by ruminating about choices and what should

come first. The fifth skill an agile leader needs involves efficiently sorting through many options to identify one that has the best chance of success.

You've probably used many different methods to deal with this challenge; here's a rundown of some of the most common. The first is consensus, in which everyone agrees to support a particular decision. But consensus can be hard to achieve; groups that insist on it for philosophical reasons may find themselves taking a very long time trying to reach it.

Alternatively, you could vote and let the majority's choice carry the day. This has the advantage of being straightforward. Majority choice voting has a significant shortcoming: Each person is (generally) using one criterion to make their choice. Also, there's been no discussion about what the criterion is or should be. And if the challenge is really an adaptive one, thinking about things in light of only one factor is probably too simplistic.

Metrics are a way to develop a common language, so that we know we are talking about the same thing.

The 2x2 Matrix

The 2x2 matrix is an alternative way to make these kinds of decisions. To use this tool, there is a very important decision to make: Which two criteria should be considered? You could use any two criteria you decide are best-suited to your challenge, but two in particular are suggested: impact and ease of implementation. That's why it's called the Big Easy. The "Big" inspires people and engages them emotionally. The "Easy" means that there are practical steps that can be taken now to move toward this opportunity. You are looking for the opportunity that has the largest impact and is the easiest to implement.

Using the 2x2 matrix as a way to choose among different options is as simple as drawing a four-square grid on a piece of paper. Put one criterion along the bottom and another along one side. Label the ends of each of these axes—one

end is high, another low. Each person votes by indicating where on the matrix they think each idea falls (an easy way to do this is to use sticky dots; assign each idea a different color or put numbers on them). The opportunity that has the most votes in the quadrant that represents high ratings for both criteria is the winner.

When you practice the Big Easy, you will find your skills for making choices improving. Agile leaders use these skills to help guide choices about which opportunities make the most sense, even when the environment is a complex one.

Skill 6: Convert Your Ideas to Outcomes with Measurable Characteristics

Agile leaders know how to translate ideas into meaningful, measurable outcomes that, when pursued, will help organizations achieve their most cherished ideals.

To help groups adopt an agile strategy approach, ask them to consider three questions: If we are successful,

- What will we see?
- What will we feel?
- Whose lives will be different and how?

These questions are very qualitative by design. They ask you to imagine what something would be like and to describe it so that others can imagine it as well—the more specific, the better. This may feel uncomfortable, particularly if you're technically oriented and most attuned to data and charts and graphs. Try to suspend your discomfort and engage the more visual and creative parts of your brains. People sometimes close their eyes for a few minutes of silence when they get to this point. Then they are asked to verbalize what they're imagining.

When you put this skill into action, a couple of things will happen. First, the idea itself will begin to change. You'll go from the fuzzy image on a black and white TV to high definition. Also, each person will emotionally engage with the outcome. People start to physically lean in, to gesture. They are seeing the outcome "in their mind's eye." For real transformation in any area, you will need that engagement, that commitment.

Metrics to Develop a Common Language

This skill invites us to think about metrics in a different way: Metrics are a way to develop a common language, so that we know we are talking about the same thing. If you can get to agreement about how you would measure a success-

ful outcome, you can be fairly sure that you are aligned toward the same outcome.

Selecting the ways in which you might measure an outcome does not necessarily mean that you're pledging to actually carry out the measuring. You might do so . . . or you might not. You are not writing an assessment or evaluation plan or committing to Key Performance Indicators. For now, you are only using this skill as a way to engage and align a group's members toward a shared outcome.

When you ask the three questions, try for at least three statements about the outcome—not necessarily one answer to each of the questions but three or four statements in all. Once you have statements about what a successful outcome would look like, go back to each one and name a couple of ways you could measure that quality.

It is only when we are sure of what we want—in detail—that we can really pursue it. This skill allows agile leaders to guide groups in the kind of dialogue that is needed in order to come to a shared commitment to a common destination.

Skill 7: Start Slowly to Go Fast—But Start

We may all have an outcome to achieve in our mind—a better job, a more agile organization, a more prosperous community—and we want to get there as quickly as we can. The reality is that we really can't learn how to make progress toward that outcome until we *start* doing something.

Agile leaders are biased toward action for a simple reason: We only learn about these complex systems by doing. If we want to make big changes fast, we have to go slow . . . but above all, we have to go.

When you have an outcome in your mind, it does not have to be perfect to start. Equally important, you don't need to plot a perfect path to your outcome before you do anything. In order to learn how to get from here (where you stand) to there (the outcome you want), you need to start with something quite limited in scope and see what happens.

Without starting, you can easily become overwhelmed. Karl Weick, a psychologist at Cornell University, published an important paper in 1984 that captured this idea. Weick was exploring why large-scale social problems can close down innovation. These social problems, such as increasing poverty, rising crime rates, environmental pollution, heart disease, or traffic congestion can loom so large in our

minds that we become paralyzed.

When we break big challenges into smaller, more manageable tasks, we not only reduce our risks; we also increase the chance of feeling good about getting something accomplished.

Key Qualities of Good Starting Projects

There are a number of important characteristics of a good starting project: they are short (enough)—90 to 120 days is a good length; they engage everyone on the team, they create a buzz, garnering attention for the work; they test some key assumptions (for example, a low-fidelity prototype often tests customer acceptance: will customers be willing to pay for the product, and how much?); and they don't require permission.

Examples of good starting projects include a pilot, a low-fidelity prototype, a forum series, a website, site visits or field trips, customer discovery interviews, or a business plan. Remember that you are experimenting: You may find that your first project doesn't go the way you're hoping. That doesn't mean it's not the right project.

Skill 8: Draft Short-Term Action Plans That Include Everyone

Agile leadership means ensuring that good ideas don't die on the vine, by making sure that each member of a group shares the responsibility for implementation.

When we hear the word "leader," most of us will be thinking about leadership as a quality that resides in a single person. Instead, focus on leadership as a shared characteristic of a group or a team. We need others to join us in leadership to take on complex challenges.

Perhaps the most visible, pragmatic example of shared leadership is a shared action plan. The plan needs to be documented in writing, not just left to people's powers of recollection. An action plan lays out in detail what needs to happen next to keep moving forward.

In an action plan, members of the group take responsibility for the specific "to-do's" that need to be done. An action plan should be limited to a short timeframe—say, the next 30 days. Why? Because if you're in a complex environment, things change rapidly.

While the action plan is straightforward, it's also easy for this step to go awry if careful attention isn't paid to the details. Each person should have something to do in the action plan—a promise they are making to the group.

The first way agile leaders maintain the momentum of a network is to nudge everyone to move ideas into action and complete their tasks.

When you're developing an action plan, you want to include everything that needs to happen in the next 30 days, and for each item you should specify

Who: A specific name (or at most, two names) should be assigned to each item.

What: What is it that the person will be doing? For example, making three phone calls to whom? Writing up what?

Deliverable: Often it is a written document of some sort. If someone is talking to three people about a topic, the deliverable might be a paragraph about what they learned, distributed to other team members.

By when: If this is a 30-day action plan, then all action items should be completed within 30 days.

Skill 9: Set 30/30 Meetings to Review, Learn, and Adjust

To make sure that agile strategy efforts stay on track, we use a feedback loop. Agile leaders need a specific kind of feedback loop: a learning loop.

In complex systems we do not know what will work to change the performance of the system. We'll have to experiment to identify leverage points. We also need learning loops because circumstances change. The environment is not stable, so we will want to make adjustments along the way. When your team meets frequently to examine the results of your work and discuss adjustments to the next cycle, you are making sure that you have a learning loop.

The phrase 30/30 refers to these meetings. The name comes from Edward Morrison's earliest work in Oklahoma City. As he was working with a team to develop a strategy for transforming the city's economy, his team met every 30 days to review their progress.

The agenda was simple. What did we learn the last 30 days? And what will we do the next 30 days? In a 30/30, you check in on progress, review results, discuss needed changes and make adjustments. A 30/30 is simply short-

hand for the next time your team will meet and what the agenda will be, in very broad terms. A 30/30 looks backward at the last 30 days and forward to the next 30 days.

The agenda for a 30/30 meeting should be very clear and simple. You could use the following questions:

- What did we learn the last 30 days?
- Here's the outcome we've agreed to. Do we want to make any changes? Does everyone all still agree with the outcome we've chosen?
- Are we on track for what we're currently working on? How should we update our action plan?
- When and where will we next get together? Are there any communication problems we need to resolve?

As 30/30s become a habit, teams build resilience and a knack for flexibility over time as they incorporate change into their projects and respond to new members, new assets, and new networks. This strength-building will be key as the group begins to take on bigger projects.

Skill 10: Nudge, Connect, and Promote to Reinforce New Habits

"Doing differently" when it comes to collaborative networks needs to become a way of life, a set of new habits. There are three specific kinds of activities that will make these new habits of collaboration more likely to be permanent.

The first way agile leaders maintain the momentum of a network is to **nudge** everyone to move ideas into action and complete their tasks. In nudging, we are acknowledging the reality that most people will not do what needs to be done all of the time without this kind of reinforcement. We all need an extra push (at least some of the time) to get us to do our part in the new collaborative venture.

When we nudge, we are really doing two things: Most obviously, we are ensuring that a particular task is completed. Less obvious but more important is the second function of nudging: We are establishing positive norms for the group.

Another habit of agile leaders that strengthens a network is to **connect** new people and other networks to it. In connecting, you intentionally seek to grow the network. Networks have porous boundaries. Connecting is taking an active role in helping people move across that boundary to be more tightly connected to your network. Each addition to the network brings new resources and assets that might be instrumental in the group's future work.

The third habit to cultivate is that of **promoting**. Unless your group is engaged in classified espionage, you want to publicize your successes. This helps attract more people to your network that you might not have had access to otherwise. Promotion is particularly important if yours is the kind of group that doesn't have much in the way of access to financial resources. People with money make decisions about where to invest it based in part on their calculation of risk—and the best predictor of low risk is a track record of achievement. Even if your successes are small, they communicate that you're a good investment prospect.

How you promote your work can vary wildly. It could be everything from an intentional but informal conversation with a decision maker in the company cafeteria to an all-out social media blitz. However, everyone in your group should be prepared to explain what you're doing in what's sometimes called an elevator pitch—a clear description in less than two minutes.

The person who takes on nudging, connecting, and promoting is the Chief Doing Officer, or CDO. The CDO's job in one phrase would be “helping a group grow into new habits.”

There isn't a specific experience or title or degree that is a

prerequisite for being a CDO—people from all walks of life do it very successfully—but their one personal trait that is critical is emotional intelligence. Emotional intelligence is the ability to be aware of one's own and others' emotions and to use that information to choose the correct behaviors in a particular situation. In this context, it is important because such a large part of the CDO role is persuading others.

The need for a new approach to the complex challenges in our world has never been greater. Complex collaborations emerge when we follow a small set of simple rules.

Think of a flock of geese or starlings. Their complex, unfolding formations emerge from each bird following a small set of simple rules. The same is true for human collaborations. The 10 skills for agile leadership offer new ideas about how to have conversations that will lead to real change.

IF YOU LIKED THIS SUMMARY, YOU MIGHT ALSO LIKE:

- *The Future Workplace Experience: 10 Rules for Mastering Disruption in Recruiting and Engaging Employees* by Kevin J. Mulcahy and Jeanne C. Meister
- *The Age of Agile: How Smart Companies Are Transforming the Way Work Gets Done* by Stephen Denning



Edward Morrison is the original developer of Strategic Doing and founder of the Purdue Agile Strategy Lab. Scott Hutcheson is Associate Director of the Purdue Agile Strategy Lab. Elizabeth Nilsen is Senior Program Director of the Purdue Agile Strategy Lab. Janyce Fadden is Director of Strategic Engagement for the College of Business at the University of North Alabama. Nancy Franklin is Principal of Franklin Solutions, working with leaders to facilitate strategic initiatives.

Strategic Doing: Ten Skills for Agile Leadership by Edward Morrison, Scott Hutcheson, Elizabeth Nilsen, Janyce Fadden, and Nancy Franklin, Copyright © 2019 by John Wiley & Sons, Inc., has been summarized by permission of the Publisher, John Wiley & Sons, Inc. 224 pages, ISBN 978-1-1195-7866-6.

Summary copyright © 2019 by Soundview Book Summaries® www.summary.com, 1-800-SUMMARY.