

VIEWPOINT

Eight Practices for Strategic Agility

Rather than a glossy brochure that no one reads, your strategy should be an ongoing practice that informs your decisions and adapts as circumstances change.

BY DAVE ALGOSO

Spend more than a few years working in the social sector, and you'll notice two things about strategy: First, everyone claims to have one, even if it's unwritten, and second, even if it's written, most people won't be able to tell you what it says.

There's always some kind of thread connecting your actions to your goals. It might be unstated or unexamined, confused or illogical or (more generously) "implicit." Nonetheless, it's there, guiding your work. That's your *realized* strategy.

But contrast this with the processes organizations often use to define, capture, and communicate their *stated* strategies. Every few years, expensive consultations yield an impressive-looking document with polished visuals and charts, shiny but forgettable. The organization's work then drifts in and out of alignment with the strategy, though the staff may never notice. The only team members who look at the document a year later are the ones writing grants or reports, who ground descriptions of their work in the strategy as it's written, even when it doesn't reflect reality.

This disconnect represents major missed opportunities. Strategy—which goes well beyond a strategic plan—can be a powerful tool for aligning teams and partners in achieving common goals. It can provide the frameworks and processes for ensuring that our efforts are more than simply piecemeal.

When a document crafted more for external communication than for internal alignment stands in for strategy, we lose the space for deliberate adjustments

to our realized strategy. The gap widens as news and attention cycles accelerate, constantly shifting our strategic landscapes. Technology improves our ability to respond to these changes, but we may often feel as though we're failing to keep pace.

Our strategic plans have become less relevant, while the need for strategy has never been greater. For many, strategic planning is like the vestigial wings on an emu—a useless remnant of an earlier function.

Organizations that believe in the power of strategy are reviving strategic processes and keeping the results meaningful in their work. They're taking a more agile approach: They're acknowledging that change brings uncertainty, they're collecting and responding to feedback, and they're breaking down

barriers to collaboration. More than something you have, strategy is something you *do*.

RIGHT-SIZE THE PROCESS

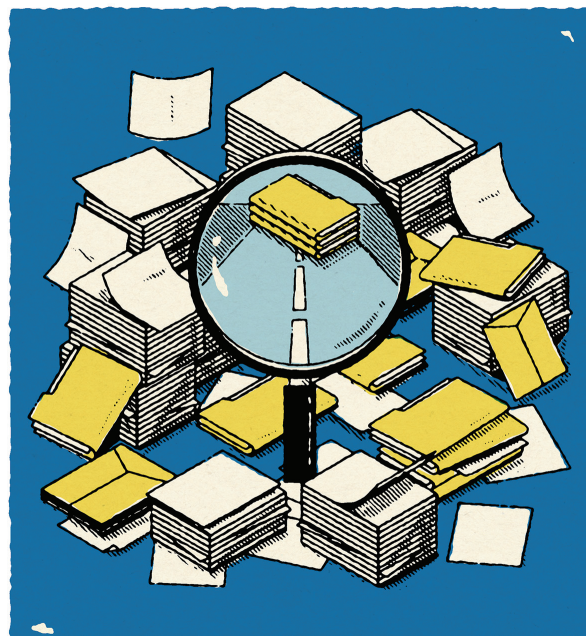
Strategic processes typically include some combination of the following elements: analysis of internal and external factors; definitions of vision, mission, and values; formulation of the core strategy itself; implementation decisions (e.g., on staffing or budgets); and monitoring and feedback during implementation.

Organizations can make both the process and its results more agile by following the eight practices outlined below. The first five concern the strategic planning process itself, especially the ways in which conveners frame it and participants experience it.

1. Clarify the scope of potential change. You face important decisions about what you open for discussion. A strategy process can be a chance to refresh all the elements mentioned above, or it can focus on updating the core strategy while keeping the other pieces fixed. You might decide your vision and mission are sacrosanct but that you need to reconsider your values statement. You might include the implementation decisions as part of strategic planning or save those for a separate process. There are no absolute answers

about the scope, but there are trade-offs: You don't want your colleagues to suffer from change fatigue, and you need to be able to focus on the right details at the right time.

2. Design the process from the perspective of strategy users. People often get frustrated when they're involved in the strategic process in the wrong ways, at the wrong times, or at the wrong levels. Take a page from user-centered design: Define the multiple user groups of the strategy—the staff, board members, partners, donors, and others



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who will be part of the process and/or will make use of the results—and map their journey. What does it look like from their perspective? How will their participation bring their insights into the conversation, help them take responsibility for the outputs, and also meet their needs?

For internal teams, look for ways to use existing gatherings and communication channels. To be sure, strategy conversations sometimes need to be separate from regular work; retreats that take you away from the office help disrupt stagnant thinking. But staff meetings, internal newsletters or blogs, Slack channels, and other familiar platforms facilitate teams' ability to tackle unfamiliar questions of strategy.

Externally, a strategy process can expand the number of people and organizations who will collaborate with you, influence partners' strategies, and demonstrate your values. Wikimedia Foundation used structured crowdsourcing in its strategic plan (in 2009 and again in 2017), and transparency-minded organizations such as Global Integrity and the Open Contracting Partnership have shared early drafts online for public comment.

3. Use outside sources to support—but not replace—internal stewardship. External consultants can help with a strategy process, but it will live or die through internal leadership. One internal point person or office needs to drive the process. For tasks such as research or facilitation, weigh consultants' expertise against team members' commitment and tacit knowledge, as well as the skill-building opportunities each job provides. While internal teams need not execute every component, leadership should bring their vision and perspective to every major step, from input to insight to decision.

4. Look back, look around, look forward. Many methods for exploring strategic context and potential pathways exist, including systems mapping, trend analysis, strategic foresight, scenario planning, network analysis, and power mapping. Each tries to make sense of the world, your organization's place in it, and how those two could evolve.

Rather than defaulting to well-worn approaches such as SWOT (strengths, weaknesses, opportunities, threats) analysis, figure out the primary challenges you're facing and match methods to those. For example, if your objectives are at the level of systems change where social, political, and economic factors intertwine, then a visual map of your target system can bring essential clarity to your efforts, as the Democracy Fund saw when it mapped how Congress functions. In volatile contexts, such as humanitarian relief or political campaigns, scenario planning can help you prepare for multiple pathways.

5. Bring everyone along. An executive team stewarding a strategy process can easily overestimate how well other team members and partners understand the decisions being made. You are privy to all conversations, while they see only pieces. Make up for the difference by overcommunicating the process and its results, sharing what you're learning and what it means.

You can bring people along by sharing the results visually. One method is a strategy canvas, a template for laying out essential components, such as costs, revenues, activities, partnerships, and more. Canvases push you to simplify and distill. The most popular version is the Business Model Canvas that the for-profit sector uses, but many variations exist, such as the Campaign Canvas and the Community Canvas.

AGILITY IN EXECUTION

A well-run strategy process will carry you only so far. The final three practices focus on how you bring agility to your execution.

6. Embed the strategy, starting with the process. The practices described above can increase your overall agility. For example, internal stewardship of the strategy process helps team members strengthen their strategic thinking and also learn new approaches such as systems mapping, which they can apply to revisiting and adapting the strategy as external conditions change.

Similarly, holding strategic conversations in existing spaces can shift norms toward a more inquisitive organizational

culture, which may be easier to sustain in those spaces than if an organization sees strategic thinking as separate from regular work. Furthermore, you can design the process to deepen relationships within teams and build bridges across them, enabling future cross-pollination that can generate new opportunities.

Once you have written your strategy, embedding it may call for bigger changes. Some will be obvious: updates to your measurement frameworks or staffing changes in light of new goals. Others will require deeper shifts, especially if they relate to culture. Some organizations craft new ways to communicate their values or give guidance for difficult situations, often through clearly stated "simple rules."

7. Allow adaptation at all levels. Teams need to embed the strategy by tailoring it to their specific work and by building their own agility. At the team or program level, adaptive management moves away from prescriptive activity plans and tight controls and toward a flexible approach that will allow teams to respond to organization-level changes and to pursue the innovations that might bubble up across teams.

8. Talk about it. The strategy deserves a formal review at least annually, but don't miss the regular opportunities to talk about it. Structure staff meetings around strategic objectives. Highlight implementation progress and challenges in the newsletter. Paint your top goals on the wall above the reception desk. If the strategy was worth anything to begin with, it's worth keeping top of mind to guide everyday decisions.

As with everything, organizational context matters. The details of the above may look different for you. The biggest lesson is that a strategy must be more than a document. That means, first, that the strategy actually helps you make decisions and achieve your goals, and second, that you revisit the strategy as circumstances change. Either of these approaches will distinguish your strategy from that of most other organizations. Doing both together is what makes it agile. ■