

Strategy & Tactics

Understanding a fundamental
management tool

Neil Rathbone

This is an introductory presentation on strategy and tactics. The objective is to understand what we mean and how we should go about formulating strategies and tactics: in business, in public sector management, and even our private lives.

Part one:

What is strategy?

The word 'strategy' has now been so debased through overuse and misuse that even respectable dictionaries are carrying definitions such as 'long-term planning'. Sadly, this misses the real value of strategy as a thinking, planning, and management tool. Older dictionaries, while they may not reflect modern use, give a better insight into what strategy should mean, and its origins in military planning.

Military origins

Generalship, the **art** of war,...[the] art of so moving or disposing troops or ships or aircraft as to impose on the enemy the place & time & conditions for fighting preferred by oneself.

Oxford dictionary (old definition)

The 1964 Oxford English Dictionary says this: [read slide – memorize even]

Meaning?

- Overarching
- Best chance of achieving your objectives
- Taking into account:
 - Your strengths/weaknesses
 - Environmental opportunities and limitations
 - Other's strengths and weaknesses (enemies, competitors, allies, authorities, customers)
 - Anything else that could help or hinder (public opinion, local culture, communication)

In other words, arranging things so as to give yourself the best possible chance of achieving your objectives; in particular taking account of your own capabilities and anything that will be working against you such as your weaknesses, the intentions of rivals, or environmental factors. Strategy is not planning: it is the overarching way that you approach the planning process. Strategy is how you are going to position yourself in order to make the most of natural advantages and overcome disadvantages in order to achieve your objectives or fulfil your mission.

Long term

- Related to objectives/mission
- The things taken into account don't change rapidly
- Guide for plans, decisions and actions
- Coordinator of independent elements
- Consistent and cumulative effort

While I am being picky about definitions, it is worth being clear that objectives have a defined point of achievement, while missions are ongoing. You will know whether or not you have achieved your objective and you can stop when you have. A mission is an ongoing activity until you decide it is no longer your mission. I tend to use planning to refer to the overall process of which strategy formulation is a part, and use 'action plan' to refer to the specific, normally time-based, detail of actions to be taken, including responsibilities to be assumed.

It is the process of self-analysis, situational analysis, and thinking that produces a good strategy and this is a process that not only takes concentrated thinking time, but also requires adequate elapsed time for participants to absorb, reflect, and develop consensus. A key quality of a good strategy is that it will, for a considerable period of time, guide and focus the decisions and actions of everyone who is in your team, or just on your 'side'. This means that there is less need for central command and communication – something that is not always possible to maintain.

Changes slowly over time

- People change
- Conditions change
- The objective/mission changes

Having said that a key quality of a strategy is consistency and its long-term nature, it will need revising from time to time, and occasionally completely changing.

Strategic planning is about thinking, and this is not as easy a process for we humans as we tend to believe. There is a temptation to rush to solutions or to adopt a collection of 'old favourite' tactics, rather than a well-balanced and astute strategy. While successful strategies can be inspired, and the dictionary refers to the 'art', they are more usually the result of careful and restrained reality-based planning.

A good strategy

- Maximises chance of success
- Minimises risk of failure
- Optimises degree of success
- Optimises impact of failure
- Simple and clear
- Built from consensus

As a strategy is only really a structural plan for how you will arrange and use all your resources, it will be both proactive, in terms of aiming for the achievement of your objectives, and reactive, in terms of being adaptive your environment. A strategy on its own would be useless; it has to be an integral part of a broader process of planning. For example,

Formulating a strategy

- Agree objectives, mission, or vision
- Analyse any past progress, successes and failures
- Analyse your own capabilities and the external factors
- Plan your implementation (the 'Action Plan')
- Pre-plan any tactics you can

The whole strategic planning process might look like this: [see slide]

It's not rocket science, but it does require clear thinking and a degree of honest introspection. 'SWOT' analysis is one good way to do the introspective part. Having developed the strategy you may even be able to plan some tactics based on known likely scenarios.

Part two:

Tactics

So let's now look at tactics.

Military origins

Art of of disposing...forces in actual contact with the enemy.

Oxford dictionary (old definition)

Tactics are short-term moves that you make in response to situations as things unfold. Ideally they will be manifestations of your strategy, but they may also depart from it due to opportunities, threats, or other factors, such as the element of surprise, that allow you to gain a short-term advantage. Tactics wins points. Points win prizes. Strategy still wins the battle.

Meaning?

- Localised
- Responsive to events as they unfold
- Reinforces strategic pillars
- Artful and intelligent
- Modified on the fly
- Fast low-level decision process

A key feature of tactics is reaction time. Decisions have to be taken close to the 'front' and sometimes at less senior level.

It is here that a good and well communicated strategy forms a 'wrapper' within which relatively junior people can be allowed some freedom to think for themselves and respond to events. In the fog of war, or the daily pressure of time, there is not the possibility to directly control every individual.

Short-term

- Events driven
- Changed or modified in response to opportunities and threats
- Experimentation possible
- Feints and deceit are valid tools
- Secrecy important

Finally, tactics can be tried and rejected, something you cannot easily do with the bigger, slower, behemoth of strategy. Tactical ploys also need secrecy, or they can be blocked and foiled. This is the area where cunning and psychology can be more important than thought and planning.

Good tactics

- Demonstrate good judgement
- Understandable at local level
- Interpret strategy into actions
- Timely reaction to events

There is still an umbilical that links the mother that is strategy to the child that is tactics. One feeds the other, but independent action by the child is possible, indeed can be essential, like reflex actions, if events unfold in an unexpected way.

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In this presentation we have looked briefly at understanding strategy and tactics. Learning the 'art' is the next step.