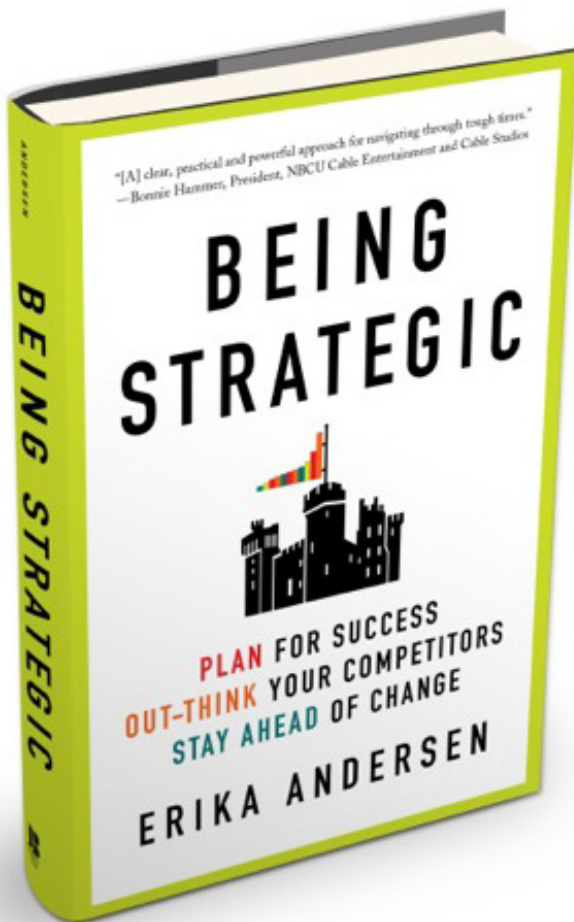


BEING STRATEGIC

Chapter One



Chapter 1

The Castle on the Hill

I'm fascinated by castles. It's one of the many reasons I love Wales, a quirky, ancient little country with more castles per square mile than any other country in Europe. I'm fascinated by them at least partly because they provide such a grand metaphor for the idea of thinking strategically. There's a castle of which I'm especially fond: it sits up on a hill, tucked away in the far northwest corner of Wales, with the little village of Cricieth spread out around it. There's not much left of the castle now—parts of two gatehouse towers and some low stone walls—but you can squint your eyes and see what it would have looked like 800 years ago, high on its promontory overlooking both Cardigan Bay and the surrounding countryside.

Imagine what must have been required to create such an edifice, all those hundreds of years ago. Not just the building of it—the months or years of grueling labor in all kinds of weather; people and animals, tools and stone—but more than that. Thinking through the idea, and then pulling together the diverse resources and support needed to make it a reality—all without benefit of modern machines, modern technology, or modern communication.

And I realize it could only have arisen from a very clear intention, sustained over time: *consistently making those core directional choices that will best move you toward your hoped-for future*. In short, successfully building a castle, especially on a cliff over the sea in the wild northwest of Wales in 1230, called for *someone* to be very strategic.

That someone was a guy named Llewellyn Fawr, Prince of North Wales at the time. “Fawr” means roughly “the Great” in Welsh, so you can see what folks thought of him (and his castles) even then. Let's follow him around for a little while in our imagination, just to get a feel for him being strategic.

Llewellyn stands on the beach, looking out at the Irish raiders in their boats. He and his men have just beaten them back into the sea, and he's wondering yet again how he can keep his lands intact and thriving, how he can fend off not only the Irish, but also the Normans, the Danes, and whoever else wants a piece of his domain. He thinks to himself: How can we best protect and defend ourselves from our enemies?

He thinks about all his resources and difficulties. The Welsh are brave and tough, good fighters and loyal to their prince. They know the land and how to best live on it and work it. Their farms and hunters provide enough to feed and clothe them, and they're not dependent on outsiders for necessities. On the other hand, like any land-based people, they're at the mercy of the weather, and they don't have a ready source for new or better weaponry. They have a number of enemies, but they're somewhat protected on the east by the high, rugged mountains. Having the sea on their other borders means enemies are easy to spot long before they arrive. He knows the Irish are spread very thin, and are trying to do too much right now. However, he also knows the Normans, in the other direction, aren't spread thin—and their endless urge for conquest is deeply worrying.

He also thinks about history. He knows his father's and grandfathers' successes, and he knows their mistakes. For instance, he's learned from the past that building fortifications from wood is neither very secure nor very permanent, and that building in high places works well, both from a defensive and an offensive standpoint. He knows what his people are passionate about, and what isn't important to them. They care about the land, and their families, and being independent—and they have traditionally cared less about abstract ideals of nation and statecraft.

With this clear sense of himself and his people, of where they've come from, what they have going for them and what they're up against, Llewellyn starts to look toward the future. He calls together his nobles, and he shares with them his reflections on their common history and their current situation. Then he says to them, in 13th century Welsh, of course, "So, my friends, given all this, how can we best protect and defend ourselves and our people from our enemies?"

After much discussion (and many cups of mead), the group comes to the conclusion that the core of that safe and strong future would be a well-built, fully defensible and strongly-fortified castle on the hill before them, providing excellent oversight of the sea to the south and west, and the land to the north and east. They've got a pretty clear overall agreement on how it will work, what it will look like, and what it will do to protect them.

Having agreed to that, they bid each other good night, and promise to start deciding how to make it a reality in the morning (when the mead wears off)...

We'll come back to our medieval Welsh nobles in a few minutes, but for now, here we are, back in the 21st century. And I'll bet you're wondering why I've led you down this particular path. Let me explain myself.

In the introduction (if you haven't yet read it, you may want to go back and do so, or you'll keep wondering what I'm talking about), I told you that from my point of view, being strategic is a learnable skill, like playing chess, or doing carpentry. And like both of those skills, being strategic involves learning to think in specific, patterned ways, and then acting based on that thinking.

I'm using Llewellyn, his men (sorry it's all men—remember, this is the 13th century) and his castle to talk about this way of thinking and acting because it's just such a wonderful example—and also because it allows me to then use the metaphor of "the castle on the hill" throughout the book! So, let's go back to Llewellyn and his entourage and see what they do next:

The Welshmen meet again around the council table bright and early the next day, ready to figure out how to achieve that safe and strong future they've envisioned for themselves; that castle on the hill.

First, though, Llewellyn encourages them to think about what they're going to have to overcome in order to do this. One guy, Gryffudd, notes that they haven't built a castle like this before; they've only made wooden hill forts. Some others point out that the hill is really steep, and while that's great in terms of defense from enemies, it's going to make it a real pain getting men and supplies up there to build the thing. Finally, Dafydd and Owain, the captains of the guard, point out that there's no guarantee they won't be attacked while they're building—and they'd be more vulnerable than usual, with all their able-bodied men engaged in the construction. Llewellyn

agrees with everything, and throws in a few more: the time and energy required to transport the stone and the fact that anybody who's building the castle won't be able to tend their fields.

After that, there's a lot of talking—the Welsh are enthusiastic and skillful talkers and arguers—but by the time the sun is overhead, they've agreed on the most important efforts they need to make, given where they're starting from, where they're trying to go, and the obstacles that exist. Llewellyn summarizes, "All right, my nobles, here's what we've decided: We need first to design the castle—a castle that will protect us and that we can build with the skills and materials we have access to. Second, we need to decide how we'll build it—the whole process from start to finish. Third, we need to figure out how to defend and provision ourselves while it's being built. Is that about it?"

All the men nod their assent. "Good," Llewellyn continues. "Gryffydd, you're in charge of deciding the design of the thing. Ifor, you're in charge of figuring out how to build it. Dafydd, you and Owain create the back-up defense and provisioning plan. Be back here in two weeks to recommend what, who and when."

As the meeting breaks up, Gryffydd immediately turns to his cousin Hwyl, who has been spying on the Norman fortifications in Shrewsbury, to ask him to help create an approach for designing the castle, incorporating the techniques the Normans use so well. Ifor leaves to find Teilo, who is great at organizing men and supplies. Dafydd sits down with Owain and the biggest landholders to think about a secondary defense and provisioning plan.

They're on their way to their castle on the hill.

Now, of course, I'm mostly making this up out of whole cloth. But I can only imagine it took place *something* like this, because there it is, almost 800 years later; Cricieth Castle, a monument to their clear intention and well-planned execution. So let's pretend that it all happened just like this, an amazingly clear example of the model I'm about to share with you:

Being Strategic

Define the Challenge, then

Clarify *What Is*

Envision *What's the Hope*

Face *What's in the Way*

Determine *What's the Path*

Define the Challenge: In my sentence about being strategic, you'll notice that the last four words are "*toward your hoped-for future.*" This implies, of course, that you've figured out what aspect of your future you're looking toward! Defining the challenge allows you to get clear about this. Generally, the most useful way to define your challenge is to find a "How can I...?" or "How can we...?" question that best summarizes the problem you're trying to solve or the goal you're trying to reach. For our Welsh prince, Llewellyn, the question was, "How can we best protect and defend ourselves from our enemies?"

1) Clarify *What Is*: In this step of the model, you draw upon both history and your current reality to get a clear sense of where you're starting relative to your challenge. In our example above, Llewellyn did a kind of informal "SWOT" analysis (strengths, weaknesses, opportunities and threats). He focused internally on what he and his people had going for them and what they lacked—their strengths and weaknesses—but he also focused on factors external to him; ways in which he and his people were threatened by outside forces (the urge toward conquest of the Normans), and ways in which outside forces might provide opportunities for his success (the Irish being spread too thin). He also drew on his knowledge of history, reflecting on the effective and not-so-effective ways in which his forefathers had tried to defend their land.

2) Envision *What's the Hope*: This step is where you answer the core of the initial "How can we...?" question. You envision a future that would address the challenge as you've defined it, given your current reality. Llewellyn's group decided that building a castle on the hill would address their challenge best. They agreed how it would work and look, and what it would provide for them in terms of defense and safety. In other words, they envisioned their castle on the hill clearly enough so that they could all see it together, and feel confident that, if they created it according to their vision, it would address their challenge.

3) Face *What's in the Way*: At this point in the process of being strategic, you step back and look at the whole picture you've created so far. You know where you're starting from and where you want to go, so now you can look at what's in the way: the obstacles in between your "what is" and the future you envision. Llewellyn and his men thought through the key difficulties they would need to address in order to build their castle: a lack of previous experience; the inaccessibility of the site; their vulnerability during the construction period; the difficulty of transporting the stone; and the fact that anybody who's building the castle won't be able to tend their fields. It's essential to know what might get in the way of moving from your current reality to your hoped-for future. Then you can factor the need to get over, around, or through those obstacles into your plan.

4) Determine *What's the Path*: In this last part of the process of being strategic, you decide first on your strategies—those core directional choices or efforts you'll need to make in order to achieve your hoped-for future. Once you've selected those strategies, you'll craft the specific tactics that will best implement them. Here's how Llewellyn described the core directional efforts for building his castle: "We need first to *design the castle*—a castle that will protect us and that we can build with the skills and materials we have access to. Second, we need to *decide how we'll build it*—the whole process from start to finish. Third, we need to *figure out how to defend and provision ourselves while it's being built.*" Having agreed on these three strategies, he sends out some of his guys to come up with tactical plans—to determine the who, what and when required to implement each of the three strategies.

Here's how we visualize this process; we find it often helps people to think of it as a literal journey toward a goal:



Eight Hundred Years Later

Lest you think this process applies only to conveniently simple medieval situations, let me offer a present-day business example, to demonstrate the usefulness of this way of thinking and acting.

Some years ago, a non-profit organization came to us and asked if we could help them re-invent themselves. They wanted to regain their position as the premier women's group in their industry: membership growth had stalled and the programs they offered their members were unfocused and uneven in execution. They weren't sure who they wanted to be or where they wanted to go. They had hired a new, high-profile CEO, and tasked her with creating a new strategic plan for the organization.

First, we helped them to define their challenge. They realized they heart of it was, "How can we revitalize our organization to be the best resource available for the women in our industry?" They brought together a strategic planning committee made up of board members and senior staff, and we met for two days. During that time we first focused on clarifying their "what is" (they brought in a lot of current state data they had gathered from members and industry organizations, and we sorted through it for the most relevant information). Then they envisioned their hoped-for future, by agreeing on a new, simplified mission that focused on developing women leaders, and agreeing on their vision of what the organization would look like if they were fulfilling that mission.

Once they had done that, they looked at the obstacles to achieving the vision, both inside and outside the organization; they were especially honest about the fact that their current not-so-great reputation was a challenge to be overcome.

At that point, everyone in the group felt they understood where they were starting from, where they wanted to go, and what was in the way. I then helped them to define their path from point A to point B: choosing those core directional efforts that would best move them from their current state toward their envisioned future. At the end of two days and a lot of great, in-depth conversation, they had a "map"—a handful of strategies and the tactics to implement them—they felt would allow them to achieve their vision.

The great thing was, they didn't stop there. They incorporated this more strategic approach into their ongoing thought and action. They met regularly to continue working on their strategies, and they made a habit of coming together yearly to review their mission and vision and revise their strategies and tactics to reflect the work they had done, and keep them moving toward their vision.

Now, six years later, the organization has doubled its membership and refined its programmatic offer to focus on leadership development for women. They've also partnered with another women's organization to develop a highly regarded initiative that works with industry organizations to assess their progress on key issues affecting women. They've achieved much of what they set out to do in that initial session, so this summer they're going to meet again to "re-vision"—to decide the next chapter in the future they want to create for themselves.

On to Your Desired Outcomes

Enough of introduction and overview; it's time for the practical skills of being strategic. In the first half of the book, beginning with the next chapter, we'll focus on the individual level. You'll learn how to approach any situation in your life more strategically, in order to clarify and create the future you want.

In the second half of the book, we'll explore how you can adapt this process to help a group be more strategic in their approach. You'll learn how to share and apply the habits of thought and action from the first half of the book, using techniques and skills my colleagues and I have used over the years in helping our client companies to be more strategic.

Throughout, Llewellyn, his people and his castle will be our companions. Let's get started!

In Real Life:

Start to look for this pattern—*what is, what's the hope, what's in the way, what's the path*—in successful lives and enterprises. When you read or hear about someone making a big change in their life or the world, or an organization that's achieving its goals, see if you can recognize these four steps of being strategic embedded in the story. Once you can see the basic shape of this process in these endeavors, it will begin to make sense as a practical approach.