

The Crises of Strategic Thinking in Management

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Strategic Opportunity

The long-term strategic opportunity lies with developing mid-level talent to be the champions and protagonists of strategic change.

Severity of Illiteracy

- **Adult Literacy Crisis:** Approximately 21% of U.S. adults are functionally illiterate, struggling with tasks like reading forms, understanding health information, or interpreting basic texts.
- **Economic Impact:** 20% of Americans read below the level required to earn a living wage.
- **Emerging Solutions:** Initiatives like the "Science of Reading" and structured literacy are gaining traction as strategies to reverse this trend. These are often focused on the K-12 system but may be a foundation for corporate upskilling programs.

Intimidating Current Reality

Survey of Adults Skills 2023: United States

32% of U.S. adults score below the baseline proficiency level in adaptive problem-solving skills.

“Over time, we’re seeing more Americans clustered at the bottom levels of proficiency.”

“Adults who score at the highest levels of the proficiency scale were significantly more likely to report high levels of life satisfaction and being in very good or excellent health.”

We're one big Pavlov's dogs experiment!



New Mail



New Mail

Your Boss



Urgent, Important and Mission Critical Task

Tomorrow is a big meeting in the board. Please research all the below items and send me a summary.

How are Organizations Responding to this Reality?

- Organizational operational efficiency is “more important than ever.”
 - How many times can we tell managers this before it becomes noise? Is it already noise?
- “We must become more precise and accelerate the speed of our execution.”
 - Is it possible to do both well at the same time?
- “Innovation is necessary.”
 - Which comes with failure, is costly, and can conflict with being more precise...
- “We need to hire and/or develop the best talent”
 - Neither cost structure is appetizing unless strategic value is emphasized.
- Broad-based “competency models” will standardize behaviors/expectations.
 - Homogenized and uniform competency models conflict with increased specializations.

How are People Responding to this Reality?

- **“Pursue your passion!”**
 - Translation: Do something that’s fun, easy, and looks good on social media.
 - Passion Mindset = What the job offers you.
 - Craftsman Mindset = The value you’re producing.
- **“That looked hard. Are you okay?”**
 - Translation: Struggle and discomfort and not on the path of growth.



Basic Key Elements for Training

- **Visual-First Instructions:** Diagrams, icons, color-coding, and videos replace long blocks of text.
- **Hands-on Demonstrations:** Prioritize "learn-by-doing" and role-playing over assigned reading.
- **Simplified Formats:** Use large fonts, bullet points, and plain language; avoid industry jargon.
- **Audio/Video Support:** Provide audio recordings of procedures or use adaptive technology to read text aloud.

Requires: Regard, Dignity, Human-Centric Approach

Investing in Foundational Education

- **Employer-Funded Literacy:** Companies fund employee access to high school equivalency courses and virtual tutoring (e.g., Target, Chipotle, Guild Career Opportunity Platform).
- **Community Collaborations:** Businesses partner with local adult education centers for on-site, industry-specific workplace literacy training.
- **Workplace Buddy Systems:** Pair new hires with experienced mentors for one-on-one verbal guidance and support.

Research and advocate for foundational education.

Integrated Education and Training (IET)

- **Industry-Specific Vocabulary:** Instruction is built around a company's own forms, safety signs, and manuals for immediate applicability.
- **Registered Apprenticeships:** Programs combine classroom instruction with paid on-the-job training, allowing workers to build skills without requiring high initial literacy.
- **AI & Digital Tools:** Utilize AI-powered virtual assistants and predictive prompts to guide employees through tasks and help them understand technical documents.

Prioritize for increased self-efficacy.

Strategic & Tactical Architecture



Development Concerns



Development Concerns



Development Concerns



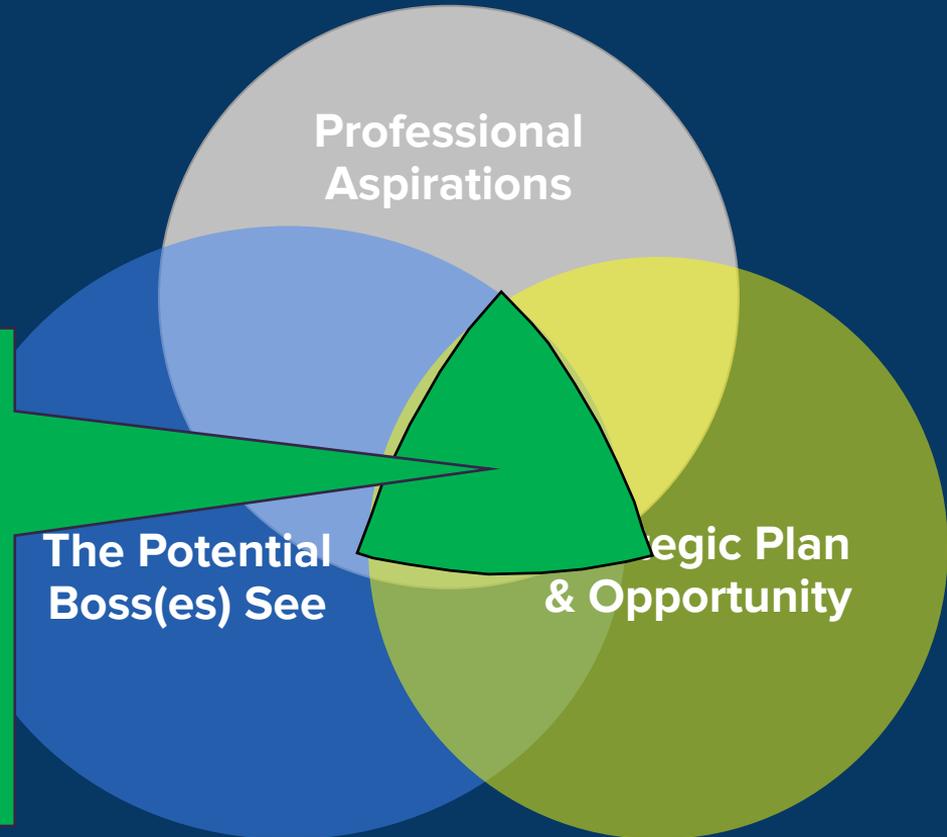
Development Concerns



Development Concerns

Sweet Spot:

- Where discomfort is explored
- Sanctioned growth and learning
- Seeks responsibilities and embraces accountability
- Expects for meaningful feedback



The new job and labor market. Strong messaging about jobs.

“This is going to hurt.”

“If you’re looking for work-life balance, this isn’t it.”

“If you think free time is overrated, this is the job market for you.”

What Boards Want in CEO Candidates: Personal Mastery

Top Board Selected Competencies	Internal*	External*
Futuristic Thinking	80	83
Leadership	81	90
Creativity and Innovation	83	85
Interpersonal Skills	70	75
Teamwork	64	70
Problem Solving	74	74
Resiliency	66	72

Number of Final CEO Candidates : 178

Time: 10/21-6/25

*Average Score

Personal Mastery Top 5

Internal & External CEO Candidates

Competency	Internal	External
Decision Making	84	83
Creativity and Innovation	83	84
Diplomacy	81	85
Leadership	81	90
Futuristic Thinking	80	83

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*Average Score

Top 5 Personal Mastery Through The Years

2016-2019	2020-2021	2022-2025
Employee Development Coaching	Self Starting	Decision Making
Customer Focus	Decision Making	Diplomacy
Interpersonal Skills	Employee Development Coaching	Creativity and Innovation
Understanding Others	Leadership	Leadership
Flexibility	Futuristic Thinking	Employee Development Coaching

Number of Participants : 3,217
Candidates and Coaching Clients

Top 5 Personal Mastery

By Gender – All years

Male	Female	Prefer Not To Say	They/Them
Employee Development Coaching	Employee Development Coaching	Decision Making	Self Starting
Leadership	Customer Focus	Self Starting	Creativity and Innovation
Self Starting	Self Starting	Leadership	Decision Making
Customer Focus	Leadership	Creativity and Innovation	Negotiation
Decision Making	Understanding Others	Employee Development Coaching	Diplomacy

Number of Participants : 3,217
Candidates and Coaching Clients

So what's the solution?

1. **Regularly align and declare the future of the role**
2. **Invest in experiential learning and development programs**
3. **Separate learning and performance**
4. **Demonstrate Outcomes**

So what's the solution?

1. Regularly align and declare the future of the role

How Time Is Spent (Invested)

Major Category	Category of Time	Today	1 Year
People			
Strategic			
Tactical			
Administrative			
Other			

- Reveals investment in a tactical energetic and mental state
- “Meeting to follow up on the meeting and get prepared for more meetings that will conclude the meetings”
- Most strategic leaders prioritize “Preparation” = 10-20%
- Great for new-to-the role leaders

So what's the solution?

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How Time Is Spent (Invested)

Major Category	Category of Time	Today	1 Year
People			
Strategic			
Tactical			
Administrative			
Other			

- Reveals how much time is spent in a tactical energetic and mental state
- “Meeting to follow up on the meeting and get prepared for more meetings that will conclude the meetings”
- “Major Category” reveals the mindset
- “Time blocking” proactively declaring and then protecting ‘moving the needle’ work.
- Most strategic leaders prioritize “Preparation” = 10-20%

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Establishing and Aligning on the Strategic Context of the role Today and Tomorrow.

- Starts with an “honest” conversation regarding the starting position of competencies, capacity, reliability, relationships, etc.
- Inherent in assessing today, the talent and capacity needs and gaps for “tomorrow” are revealed.
- Focus on IMPACT and OUTCOMES
- Today: “Reactively managing the whirlwind.”
- Future: “To deliver next-level strategically impactful content to the decision-making table.”

So what's the solution?

1. **Regularly align and declare the future of the role**

RACI = Decision Making Matrix

Adapted from Project Management Disciplines to identify FUTURE Accountabilities, Responsibilities, and Influence

R	Responsible	Who will be taking the action or doing the task?
A	Accountable	Who must sign off? Who has the authority to make the decision?
C	Consulted	Who has relevant information and/or will be materially impacted by the decision?
I	Informed	Whose work depends on this task and must be notified of results, but does not need to be consulted?
A/R	Accountable & Responsible	Who will own the work, completely?
NLM	No Longer Made	Which decisions will no longer be useful for this role to be involved in?

So what's the solution?

1. Regularly align and declare the future of the role

RACI = Decision Making Matrix

Adapted from Project Management Disciplines to identify FUTURE Accountabilities, Responsibilities, and Influence

	Target Date	VP, Controller	VP, Finance	Treasury Mgr	Accounting Mgr	Financial Analyst	Accounting Staff
Accounting							
Reporting		A			R		
Escheatment		C			A/R		
Backup Withholding					A/R		
Reconciliations		A			R		R
Finance							
Cash Management			A	R		R	
Investment Portfolio Management			A	R		I	

So what's the solution?

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RACI = Decision Making Matrix

Adapted from Project Management Disciplines to identify FUTURE Accountabilities, Responsibilities, and Influence

	Target Date	VP, Controller	VP, Finance	Treasury Mgr	Accounting Mgr	Financial Analyst	A.I.
Accounting							
Reporting	6 months	C			A/R		
Escheatment	one cycle	NLM			A		R
Backup Withholding	9 months				A		R
Reconciliations	1 year	NLM			C		A/R
Finance							
Cash Management	1 year		A	A/R		R	
Investment Portfolio Management	2 years		C	A/R		R	

How is Time Spent: Data Analytics Manager

Activity	Today	Future
Gathering data	25%	5%
Analyzing data	10%	20%
Training/developing team members	15%	25%
Meetings, Email, Administration	40%	15%
Researching/learning about AI opportunities	5%	20%
Collaboration/Coordination with Other Leaders Across the Organization	5%	15%

How is Time Spent: Chief Lending Officer

	Today	Future
Strategic Visioning/Planning		
Community Engagement (local, regional, national)		
Operational Oversight/Budgeting		
Employee Development/Coaching		
Strategic Partner Relationships		
Focus Space/Innovation		

So what's the solution?

“Future Executive” or “Management Training” programs are great...

1. Regularly align and declare the future of the role
2. Invest in experiential learning and development programs

Rigor of program must match intent:

- “This program should come with a warning label.”
- “This has been the hardest work I’ve ever done. It’s also been the most meaningful.”
- “It’s not a work/life balance conversation. It’s a commitment conversation.”

Otherwise, it is not transformative.

So what's the solution?

“Future Executive” or “Management Training” programs are great...

Exposure:

- “1/56th”
- Provides cross-functional and executive exposure
 - *“I didn't know that's what your department did!”*
 - *“I thought my job was similar to executives... it's not.”*

“Project” that furthers the strategy

- Application of learned technical and leadership skills
 - *“You've got a great idea...now you have to build it out and sell it cross functionally.”*
- **Sanctioned** exploration of adding value to the organization
- Presentation and facilitation of strategic discussion (Shark Tank)

2. Invest in experiential learning and development programs

So what's the solution?

“Future Executive” or “Executive Development” programs are great...

1. Regularly align and declare the future of the role
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Leadership Development Plan:

- 99% of executive and management of leaders do not have a documented plan for their development
- Applying critical thinking skills, contemplating relationships and competencies, mapping out actions, and setting targets
- **It's a strategy**, for themselves.

Long-term Value:

- The shared experience deepens connections. The more meaningful connections someone has, the happier they are.
- Builds connections and relationships that are **leveraged** for years.

So what's the solution?

2. Invest in experiential learning and development programs

3. Separate learning and performance

Learning

- Definition: When a relatively permanent shift in behavior occurs.
- Is NOT awareness.
- Learning is strainful.
- Growth happens when vulnerability is present.

Performance

- Contributions to organization through job.
- Performance reviews

Be a “Mentor” and not just a “Boss”

- Permission for them to be imperfect
- Do it outside the office (change of setting, change of context)

So what's the solution?

Be Accountable for Growing and Learning Too

“Be the change you want to see in the world.”

Demonstrate Strategic Acumen:

- Let them see strategic and critical thinking in its raw and polished form.
- Shadow executive meetings/calls
- Osmosis and observational learning is a thing

Develop Your Own Skills

- Outline the skills that are needed to satisfy the strategy (boards too)
- Be explicit about it as an executive team with direct reports
- Be a “learner” not a know it all.

3. **Separate learning and performance**

4. **Demonstrate Outcomes**

“Be more strategic”

“What does that mean?”

“...Uh, be more strategic”

So what's the solution?

Be Accountable for Growing and Learning Too
“Be the change you want to see in the world.”

Your role

- Outline how your role needs to evolve
- Which creates opportunity to co-design how the team could evolve

Demonstrate Strategic Acumen:

- Let them see strategic and critical thinking in its raw and polished form.
- Shadow executive meetings/calls
- Osmosis and observational learning is a thing
- “Be more strategic” “What does that mean?” “Be more strategic”

Solicit Rich Feedback

- Feedback is an accelerant for both parties
- Acquisition of rich feedback will build trust for learning process
- Be explicit with “permission” (RACI)

4. Demonstrate Outcomes

Distinguish Between Training and Development

Training	Development
Specific for an aspect of a job.	Enables improvements in the existing skill set of employees well inculcating new ones to support the company's vision.
Done as part of a job performance description.	Involves creating change in the way they behave.
Usually done in large groups and is scalable.	No fixed template for development program.
Content is reusable and consistent.	Requires thinking outside of the box.
Focused on short-term benefits and immediate needs of your business.	Is a long-term process.

“The best moments usually occur when a person’s body or mind is stretched to its limits in a voluntary effort to accomplish something difficult and worthwhile.”

-Mihaly Csikszentmihalyi

So what's the solution?

Summary

- 1. Regularly align and declare the future of the role**
 - 2. Invest in experiential learning and development programs**
 - 3. Separate learning and performance**
 - 4. Demonstrate Outcomes**
- The world will continue to change. People are at the heart of those changes.
 - Some organizational practices reward reactive thinking and low cognitive load operational work.
 - Pursuing “passion” is fundamentally different from producing value.
 - Aligning strategy with the potential you see in mid-level talent and your manager’s professional aspirations is the “Sweet Spot”.
 - Roles must evolve. Map it out.
 - Invest in intensive development programs for more than potential executives.
 - Create a learning environment where growth and imperfection are allowed.
 - Demonstrate what being an accountable learner looks like.

Central Takeaways

1. The absence of not declaring and organizing towards future evolved roles grants external forces too much authority to dictate behaviors and skill sets.
2. The long-term strategic opportunity lies with developing mid-level talent to be the champions and protagonists of strategic change.
3. Executives are the enabler and modeler of aligning what organization espouses and prioritizes.

Build Leadership Pipelines with Intention

The adaptation of training and development is a strategic move to build a resilient and innovative future workforce.

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Thank you

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