

# STRATEGIZING

*New Thinking about Strategy,  
Planning, and Management*



**ERIC J. BOLLAND**

# Strategizing

“Strategy is a powerful concept in business, but how strategy is done—by strategizing—has long been neglected. In this book, Bolland shows that strategizing is a strong human impulse that happens in all aspects of life. Businesses tap into this impulse and Bolland puts real meaning into this term by tracing the history of strategy, demonstrating how different businesses and functional areas of business can deal with emerging strategy issues, presenting case studies on strategizing organizations, offering tools for strategizing, and detailing how strategizing can be managed.”

Frank Fletcher, Former Chair of Business, Midway College  
and co-author, *Solutions: Business Problem Solving*

As the founder and CEO of IntelliQuest Information Group, a global market research and data analytics firm, and other start-ups, I'm so pleased that Professor Bolland tackled this core skill for helping dynamic organizations. Professor Bolland does an excellent job of showing how strategizing is so much more relevant to the day-to-day success of any organization than the aging strategic planning models. He provides not only the concept behind strategizing but also proven tools that will help every organization member contribute to the goals of an organization. A must read for anyone who wants to lead, contribute and work smarter in today's complex and fast-paced environments.

Peter Zandan, PhD, Global Vice Chairman,  
Hill and Knowlton Strategies

A successful business strategy requires delicate balance between choosing the best strategy and implementing effectively. Dr. Bolland begins with a brief history of strategic management and moves to a framework and toolbox for how firms can strike a balance between formulation and implementation.

Russell Coff, Thomas J. Falk Distinguished Chair in Business  
University of Wisconsin Madison School of Business and past  
President Strategic Management Society

Bolland captures the essence and dynamic of strategizing, from academic concepts to continuous application at various functional levels. A reference book for who studies, envisions and organizes the future of businesses!

Nicolas Paris, CEO, Gilson Inc., a third generation  
family-owned company developing liquid handling,  
purification, and extraction solutions with a focus  
on helping the life scientist at the bench achieve  
more productive research and verifiable data

# **Strategizing: New Thinking about Strategy, Planning and Management**

**BY**

**ERIC J. BOLLAND**

*University of Wisconsin-Platteville, USA*



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INVESTOR IN PEOPLE

*To my twin grandchildren, Elle and Miles*

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# Table of Contents

|   |                   |
|---|-------------------|
| About the Author  | <i>ix</i>         |
| <b>Chapter 1 Introduction and Framework</b>   | <b><i>1</i></b>   |
| <b>Chapter 2 Evolution of Strategy: Origin, Planning, Strategic Planning and Strategic Management</b> | <b><i>25</i></b>  |
| <b>Chapter 3 Arriving at Strategizing</b>   | <b><i>49</i></b>  |
| <b>Chapter 4 Strategizing at the Functional Level</b>   | <b><i>71</i></b>  |
| <b>Chapter 5 Strategizing in Different Businesses</b>   | <b><i>95</i></b>  |
| <b>Chapter 6 Strategizing in Practice</b>   | <b><i>123</i></b> |
| <b>Chapter 7 Tools for Strategizing</b>   | <b><i>151</i></b> |
| <b>Chapter 8 Limits, Opportunities and Power in Strategizing</b>                                      | <b><i>173</i></b> |
| <b>Chapter 9 Managing Strategizing</b>  | <b><i>193</i></b> |
| Index   | <i>213</i>        |



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## About the Author

**Eric J. Bolland** has over 30 years of experience as a strategic manager in the private and public sectors as well as concurrent experience as a full-time business faculty and administrative experience with both teaching and research experience. That includes teaching business policy and strategy at the University of Wisconsin-Madison School of Business. He is a lecturer at the University of Wisconsin-Platteville School of Business. Previously, he was Scholar-in-Residence at Cardinal University. He was Business Division Chair at Midway University and also taught at Edgewood College.

He earned his Doctorate in Business Administration from Nova Southeastern University and an M.A. in Public Administration from the University of Wisconsin-Madison. His doctoral dissertation chair was Dr Charles W. Hofer, one of the founders of modern strategic management. His dissertation on high-technology companies was published as a book by Oxford University Press with Charles Hofer as co-author. The book was also translated into Spanish and cited frequently. Bolland has authored seven other business books and one was a finalist for Management Book of the Year by the Chartered Management Institute. Additionally, he has written over 20 academic articles, conference papers, and business press articles.

In the past, he served as strategic marketing information for TDS, a strategic manager for Alliant Energy, a manager in the Strategic Support and Planning unit of CUNA Mutual Group, and the executive director of a State of Wisconsin agency.

Bolland has been a consultant for Toyota Motor Manufacturing, CUNA and Affiliates, Wisconsin Physicians Services, Madison Newspapers, and several academic book publishers.

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## Chapter 1

# Introduction and Framework

Strategizing. It is a word, a verb meaning to conduct the work of creating and executing strategy. Simple enough as a concept but operationally difficult to put into action because of the complexity and diversity in the job of making and executing strategy. That complexity is well understood by practitioners of strategy in established firms and in new, emerging firms but not well understood throughout all types of businesses and organizations. It should be better understood and accepted by business planners and organization leaders in order to take its place as a component of the whole strategy process. Reasons for this are developed in this book.

Strategizing is a gerund, a verb like noun ending with “ing”. Strategizing belongs to the huge family of gerunds whose immediate family members in strategy are planning, leading, organizing, controlling, coordinating, researching, analyzing, and managing among the many related terms. Gerunds are what we do at work; as in “working”. All these and more connote a verb in action whose opposite state is inaction.

Strategy is a noun, a thing according to strategy historians (Cummings & Daellenbach, 2009). They also note that it is a verb as in strategizing (actions taken) and adjective (becoming strategized).

From Valeria Maltoni (2016), the difference between a noun like strategy and a verb like strategizing is realized, “Once we make something a noun, it turns into a thing and ceases to be dynamic and changing. When we look at the types of actions we take, they are all dynamic – for example we keep our eye on the emergence of patterns meaningful to the business, understand how to develop, enact and amplify influence and navigate the transformation of the environment through growth.” Maltoni states strategizing involves choice based on time dependent information and strategy involves choices based on assumptions.

What do we call one who strategizes? Both strategist and strategizer are in use now but strategist is an older term. I believe that strategizer is a better word than strategist because new words are needed when old words do not keep up with our imagining. Strategizer implies active strategizing. The word strategyst was used in the 1954 RAND Corporation book *The Compleat Strategyst* and that word is now associated with game theory than with an individual who strategizes. As a consequence, I will use strategizer rather than strategist.

Strategizing applies to individuals and to groups. One strategizes especially in newly formed businesses and groups and teams also strategize. Strategizing can be very brief or it can be continuous. This study will explore the benefits of it being more continuous than episodic. Sporadic strategizing risks losing a central driving vector in establishing overall strategy. As observed by Charles Hofer, “strategy is not about making future decisions, but about the futurity of present decisions.” (Hofer, 1990).

### Definitions of Strategizing from the World of Practice

Strategizing has been defined as part of the practical world of practice as well as the world of academics. Starting with practice, we will review and critique definitions first from practice and then from academics.

To strategize is “to think of a detailed plan for achieving success in situations such as war, politics, business, industry or sport” (Cambridge English Dictionary, 2018). “Strategizing in business is the act of creating the long term plan that will allow you to achieve what you want in the opportunity you have envisioned,” as defined by Jeff Hunter (2015). The essence of this is that strategizing is a plan. That is a very limited definition. Strategizing is more than a strategic plan. In Basics of Strategizing (during strategic planning), author Carter McNamara states that this activity is usually conducted as part of overall strategic planning (McNamara, 2018). Again, the definition of strategizing is linked to the strategic planning process. But strategizing can and is done without ever being part of a strategic planning process. As will be shown in Chapter 6, some organizations strategize but never do strategic plans.

Another definition is offered as, “Strategizing is the process of thinking through on a continual basis what strategies an organization should pursue to attain its goals” (Principles of Management Tutorial, 2018). This definition is from an online tutorial on management entitled “The Functions of Management, Principles of Management” and emphasizes the continuous basis of strategizing yet restricts strategizing to thinking. The same source identifies the analysis of competitors, thinking about how changes in the environment (e.g., technology, government regulation) impact the organization, weighing the pros and cons of alternative strategies and choosing actions. Strategizing is more than just planning states this source. It is also constantly thinking and assessing alternative strategies.

Still another definition of strategizing is “Strategizing includes all practical actions performed by people to devise long-term goals (mission, vision) plans (strategies) course of action (processes, structures). Strategizing is very common in industry, business, politics and government. Strategizing is closely connected to strategic thinking. Managers should think of all important areas of company development to achieve long term objectives and success.” (ceopedia, 2018). Also added to this source is the statement that strategizing is closely connected with the decision-making process and that “strategizing should be an integral part of the management and must take into account the limitations imposed by conflicting interests, financial barriers, resource constraints, lack of information, strategic potential, lack of competence, the expected change in an environment,

competition etc.” This definition and following examples expand strategizing beyond the strategic plan itself by drawing in the larger field of strategy, but it does not go beyond strategy formulation in its definition.

Although strategic thinking is close to strategizing as has been stated, it is not strategic thinking. Some writing has made the mistake of making the terms synonymous by saying strategizing is strategic thinking. Strategic thinking is considered a cerebral exercise while strategizing is not only a domain of the mind but action taking a result of thinking. Strategizing encompasses strategic thinking not vice versa.

A major shortcoming of the practical practice-based definitions is that they are very diverse. There is no commonly accepted definition. If there are no commonly accepted academic definitions, then it is appropriate to craft one. This is a task, but a welcome one for an author because it offers the opportunity to make starting point for a working definition of strategizing.

## Academic Definitions of Strategizing

Strategizing derives from strategy, the verb from the noun, so it is worth exploring some academic definitions first before engaging in a presentation of strategizing as a definition. In this section, attention is on academic definitions. The definitions are academic because they are found in academic journals, texts, and course materials.

A definition of strategy is: “Strategy is a plan that aims to give an enterprise a competitive advantage over rivals. Strategy is about understanding what you do, clearly defining what you want to become and – most important – taking the right steps to get there.” ([The Essentials of Strategy, 2006](#)).

From the *Journal of Management Studies*, there is a definition of strategizing from the guest editors. It reads, “The detailed process and practices which constitute the day-to-day activities of organizational life and which relate to strategic outcomes.” ([Johnson, Melin, & Whittington, 2003](#)). This definition incorporates the continuous nature of strategizing with its reference to day-to-day activities.

## Arriving at Strategizing

From the past definitions of strategizing from practical and academic sources, we can arrive at a comprehensive definition that takes into account:

- the time orientation of strategizing
- the scope orientation of strategizing
- the continuing nature of strategizing

The definition is:

Strategizing is continuous thinking and acting based on the past, present, and future of the organization and its environment resulting in a clearly defined path

## 4 Strategizing

toward a desired organizational state involving analysis of internal and external factors with opportunity for participation by all members of the organization.

Operationalizing this definition necessitates some correlaries, namely:

- strategizing involves all in the organization either directly or indirectly.
- strategizing does not require a perspective exclusively on the future but a recognition of the past as a launch point, the present as a means of shaping of the future, and a future with a clear desired state.

### A Book for a Word

A whole book dedicated to a single word carries with it the responsibility on the part of the author to justify such a lengthy explication. The word must be clear enough and must also have an inherent power to describe and cause meaningful action, as the word “do” does. In our case, some 90,000 words will be used to explore a single word and its closely related words. This is a book for a word.

Strategizing originates from strategy, as stated earlier. The origin of strategy is from the Greek “strategos” or “army leader”. Dictionaries today define strategy in military terms. Strategy is a noun, meaning “the science and art of conducting a military campaign in its large scale and long term aspects” ([The New Lexicon Webster’s Dictionary of the English Language, 1989](#)). A definition of strategy and tactics can be found in the topic of Military Science in the [Concise Columbia Encyclopedia \(1983\)](#). In the [free dictionary \(2018a, 2018b\)](#) strategy is defined as “the science and art of a nation to execute approved plans as effectively as possible during peace or war.” The same source also defines strategy as “the science and art of military command as applied to the overall planning and conduct of large scale combat operations.”

Too much has been made of the Greek definition of strategy as a general’s art. That persistence of lexicographic bondage is far too limited to define strategy in the modern organization. First, the root word with its linkage as being the art of the general implies that strategy happens when generals happened. But generals were created long after armies were created, and armies were created long after tribes warred with one another. Strategies happened much earlier than formalized ranks because strategies were needed in all kinds of human conflict and the better strategy won. How to disguise troop strength, where to apply the most force, picking fields of conflict are all strategic matters and were done before extensive chains of command rising up to generals. There were de facto generals before there were designated generals. Greek and Roman military leaders were generals in practice even if they were not called generals.

So, it must be said that strategy truly developed much before the generals. In prehistoric times, humans had to think ahead, that is do long-term planning as early as agricultural cultivation of crops occurred. In ancient Egypt of 3,000 years BCE and in China of 10,000 BC the cultivation of crops was in evidence. Cultivation required knowing when to seed and when to irrigate in order to yield usable and edible crops. Navigation too preceded standing armies. A trip by river,

sea, and ocean meant planning the voyage with all its attendant duties of packing provisions, using maps, guides and having the proper boat or ship.

The more contemporary definitions of strategy remove the military context. Notably, business strategy is very different from military strategy. The world of commerce is one of the creations of goods and services while the world of war is that of destruction of goods and services. In times of war, forces confront one another, usually one army against another, but in commerce, there are many competitors trying to win the hearts and minds of customers. To draw out the distinction, one company vice president known by the author responded to a comment by his CEO that “we are at war with our competitors” replying with “No, we aren’t. We don’t kill them. We even cooperate with them at times.”

The militarized versions of strategy do not work well in peace. Commerce and trade are seen as forces that encourage cooperation. Commerce and trade are business activities that engender mutual benefits among parties.

Further separation of the definitional “strategy” from more modern aspects of it comes from the two very different aspects of military strategy. One of the aspects is strategy in war and another is strategy in peace. Armies are different and hence strategy is different in both aspects. The art of the general in the definition happens in a state of war. In peace, the army is in preparation for war.

Definitions of strategy today do depart from the drum and pipe of the military and align better with the hum and din of the modern organization. The contemporary definitions do not assign strategy to a particular organizational position. In that, they are much more generalized – to pardon the additional military reference but to make the point of definition variance that accompanies newer business strategy definitions. What can be preserved from the military definition and adapted to business is the notion of directing major resources to a major goal. Take the peninsula, not just the hill is strategic and correlates with win the whole market, not just part of it in business strategy.

## **Business Strategy Definitions**

This book deals with business strategy though it is applicable selectively to organizations which share common aspects of a business such as structure, mission, planning, and goal orientation. Seeking a profit is not a necessity but having a sustained purpose with people adding value is.

Examples of business strategy abound. An example is from the [Business Dictionary.com \(2018\)](#) which defines business strategy as “a method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem.” This definition includes decision making and future orientation. Another definition of business strategy is “The principles guiding how a business uses its resources to achieve its goals, states a business’ focus and indicates the basic steps the business will use to achieve it” ([Free dictionary.com, 2018a, 2018b](#)). Classic strategy theorists such as [Ansoff \(1965\)](#) call strategy the common



thread among the organization's activities and product markets and Hofer and Schendel's (1978) description of strategy as being "the characteristics of the match an organization achieves with its environment is called its strategy" (Hofer, & Schendel, 1978).

These definitions of business strategy guide this book. They are a step beyond the military definitions which have great limitations in application to the highly socialized and sometimes cooperative environment of business strategy.

The definitions of business strategy exhibit a wide variety of forms. Strategic management texts which are used in business school classes to explain business strategy reflect this variety as well with each text author or group of authors offering their own versions of what strategy is. There is no consensus definition of strategy among these authors. "By strategy, managers mean their large-scale, future-oriented plans for interacting with the competitive environment to achieve company objectives. A strategy is a company's 'game plan'," reads the textbook of one strategic management book (Pearce & Robinson, 2005). Another textbook definition of strategy is "an integrated and coordinated set of actions taken to exploit core competencies and gain a competitive advantage" as proposed by other strategic management textbook authors (Hitt, Ireland, & Hoskisson, 1995).

This definition variance compounds the matter of defining strategizing. Nonetheless, there are some common elements in the various definitions. They are expressions of seeing the big picture, making decisions, and having a vision of a future state of the business. These core articulations are the heart of this exploration of strategizing. Strategizing is the mindset of actively engaging in the formulation and execution of business strategy. The leap from strategy to strategizing is not as difficult as the leap from immersion in day-to-day tactics to strategy. This second leap is more difficult because of the implied loss of productive activity if one engages in what managers might regard as fanciful and not profit making speculation about the future.

Strategizing is not a precise activity. There is no strict business practice of strategizing. It cannot be done by computers, at least for now because of the high degree of ambiguity it must deal with. Strategizing is a new and uncertain endeavor in business. It is so ambiguous that even as people are engaged in it, they may not recognize that they are strategizing. It is imperceptible if you are watching it. There is no sweat on the brow, no grunting or groaning. In fact, the deeper strategizing happens, the less it takes on physical manifestation. This itself is more reason to clarify it by other means.

Strategizing falls clearing on the side of thinking rather than doing in the thinking-acting dichotomy. The doing happens in the future and the thinking happens now. As said in Robert Burn's poem, the best laid schemes of mice and men rarely fall into perfect place with strategizing. That is why it should be a continuous process.

Business strategy exists in a world of uncertainty and risk. With differing definitions and an unknown future, anything is possible. Yet what is certain about business strategy is that it matters. Businesses that accurately see the future and respond to it with strategy don't just survive. They prevail.

## Strategy as a Power Word

Within the flourish of the millions of words are the essential bones of core words used every day to communicate. These are the power words. Commands, directions, consent, understanding that propel thought into action.

Strategizing is a power word, but it is not as commonly used as other power words. It is not heard among the daily torrent of written and spoken words.

In the lead quote from a *New York Times Magazine* article about Nancy Pelosi ([Draper, 2018](#)), Pelosi states, “We have to be strategic in whatever we do.” Surely a power word in “strategic”. And the Speaker of the House says “whatever” in a body that is immersed in the here and now, the tactical not the strategic. Where stopgap measures to prevent the federal government from shutting down, where long-term budget deficits are ignored, where looming warnings about economic disaster stemming from global warming and other strategic social issues are deferred, delayed, or buried, the Speaker has endorsed “strategic” as a power word.

## Strategizing in Other Fields

Strategizing is used in the government and politics. In the government, strategizing is used to plot a path for the advancement of legislation and as a method of achieving executive action. In politics, one strategizes to be the winning candidate and the winning office. It is present as well as in sports. Teams strategize on how to win games. Strategizing is used intensively and extensively. Every athletic competition no matter the type and physicality of the athlete or the nature of the event uses strategizing as an active verb. Gambling on sporting events also makes up a part of strategizing. It is also evident in the military where it has been commonly thought as being the origin of the concept, a thought that has been countered in this chapter.

Strategizing is used in science and engineering. In science, scientists strategize on the kinds of tools to use and experiments to do in order to make discoveries. In engineering, engineers strategize to make scientific discoveries useful for everyday life.

There are endeavors in which strategizing is less pronounced too. These activities tend to be more execution-based. Art and music are examples. The execution of individual expression seems to be the objective of modern art, not representational truth. Religion is another example where there is a prescribed path, or fixed strategy, to salvation.

Considering the range of human work, the employment of strategizing in business can be considered intense. As will be established in Chapter 6, strategizing is done very frequently in business practice, up to hourly and in one case, every conversation as will be reported.

The first recorded use of the word strategize is from 1970 to 1975 according to [Random House Unabridged Dictionary \(2018\)](#). As such, it is a word that only recently joined the lexicon of strategy: planning, strategic planning, and strategic management.

Areas where the word strategizing is less intense would be rule bound, repetitive, basic commodity businesses which are not prone to innovation. Think of businesses serving basic human needs driven by demographic change more than technological and other changes as examples. Electricity, water, food, very basic housing and funeral services are examples.

Strategizing as proposed here is a power word; as a verb, it powerful as a present tense verb taking command over past tense verbs because it suggests that what can be done now will affect the future. It is prudent to strategize. There is something admirable about the propensity to think about the future the way the ant does while the grasshopper fiddles away. To think about the power of strategizing and its benefits is to distinguish it from its antonym. Is there an antonym for strategizing? A direct opposite of strategizing is not strategizing. That condition takes the form of being entirely tactical, looking for shorter term actions rather than having a longer term orientation. The attributes of this kind of view are being flexible, wily, and nimble. In marketing, it might take the form of being first to market. Marketers call this a first mover advantage. The offering of a product for the leading edge of incipient demand is the desired product positioning, and it can only be achieved if an organization correctly reads emerging demand and is flexible enough to respond to it quickly.

First movers, very notably Apple under Steven Jobs, take the position that, in Job's words, insanely good product creates its own demand and hence marketing research is not as necessary as product design.

The benefits and limits of strategizing are covered more completely in Chapter 8, but it should be noted here that critics of strategizing would say that too much strategizing is too much strategizing. Constant, continuous, and pervasive strategizing leads to paralysis through analysis or, more colloquially, all talk and no action.

## **The Strategizer and Strategic Thinking**

The concept of strategic thinking is a mindset of strategizers which requires thinking outside the confines of the organization. As the organization ploughs through its environment, the strategizer must not concentrate on the "what is" of the organization but the "what will be" outside organizational boundaries if strategic thinking is being practiced. Too much attention on how the organization is doing its job based on internal measures can cause a kind of complacency that blinds the strategizer to external factors that unsuspecting strategy planners ignore. Business history overflows where radical transformations suddenly transformed the way things were done. Air transportation, pharmaceuticals, communications, electronics, computerization, medicine all quickly transformed the way business has been conducted. Strategic thinking in business means being sensitive and responding to emerging external circumstances.

Strategic thinking also necessitates a certain level of devil's advocacy on the part of the strategizer. The heretic at the stake may be condemned by going too far from the norm but heresy itself can be a good thing as it questions ongoing assumptions and generates new ideas about how things should be done.