

LIVE
WEBINAR



Becoming The Strategic Executive

October 21st, 2020

The Foundational
Knowledge Elements of
True Strategy Experts



M. A. Pfister
Strategy Group

with **Mark A. Pfister**

— YOUR WEBINAR HOST —



Mark A. Pfister

CEO & Chief
Board Consultant

M. A. Pfister
Strategy Group

-
- Strategy expert, Board Director, & Board Consultant having worked with hundreds of public, private, and nonprofit organizations with focus in Strategy, Governance, and Technology/Cybersecurity.
 - I am known as “*The Board Architect*” for my work in the defining of structural components of effective Boards.
 - My book, ‘*Across The Board: The Modern Architecture Behind an Effective Board of Directors,*’ is a bestseller with circulation in over 70 countries.

WEBINAR REMINDERS

answering frequently asked questions

- Purpose: My approach is to share knowledge on the foundational strategy elements required for successful leadership. This is a repeatable roadmap for you to leverage.
- Questions: Write your questions in the Q&A section - if time allows, I will answer questions at the close of the presentation. Otherwise, I will follow-up with you via email afterwards.
- Materials: Yes, the entire webinar is being recorded and you will receive a link via email a day or two after the webinar ends. Also, be sure to visit www.PfisterStrategy.com/strategy-templates to download strategy templates referenced in this webinar.

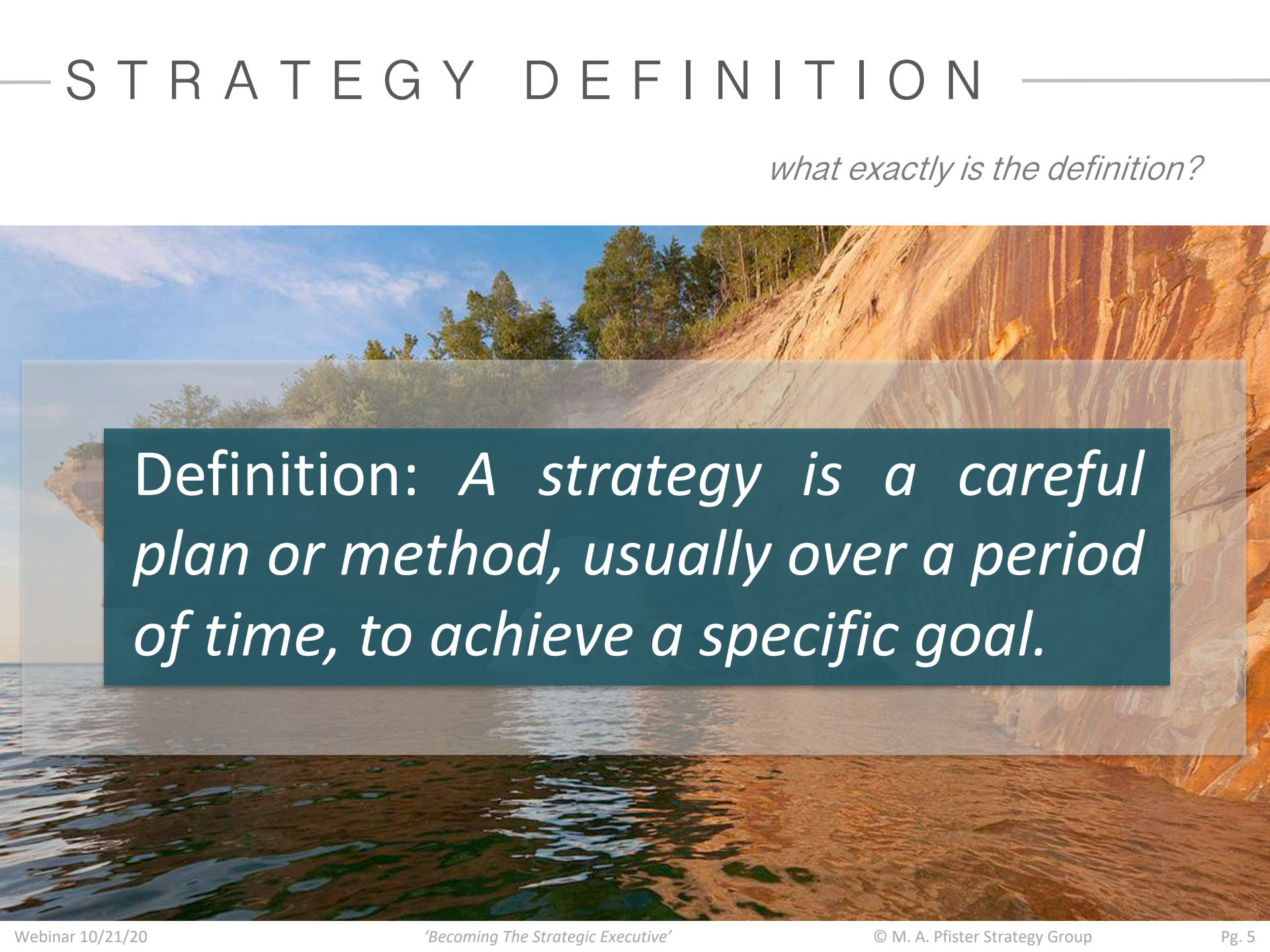
GOALS

what to walk away with from today's discussion...



— STRATEGY DEFINITION —

what exactly is the definition?



Definition: *A strategy is a careful plan or method, usually over a period of time, to achieve a specific goal.*

— STRATEGY DEFINITION —

what exactly is the definition?

WTF?

Definition: *A strategy is a careful plan or method, usually over a period of time, to achieve a specific goal.*

CRAP

MODULE 1

1

History & Evolution of Strategy

Let's first review the history & evolution of strategy...

STRATEGY HISTORY

a few interesting strategic points in time

500 BC:

Sun Tzu's *Art of War* provides a classic handbook on military strategy

530:

King Arthur designs his famed *Round Table* so that no one, including him, would be seen as above the others

70 BC:

Roman Poet Virgil tells the story of the Trojan horse where Greek forces entered Troy's heavily guarded city gates

1532:

Machiavelli's book *The Prince* offers clever recipes for success to government officials

1775:

The American Revolutionary War applies non-traditional warfare: Guerilla warfare and targeting of British officers

1904:

Ida Tarbell's exposé on Standard Oil shows Rockefeller's monopoly approach which summarizes business strategy up to 1900

1911:

'*Principles of Scientific Management*' released by Frederick Winslow Taylor

1968:

'*Experience Curves and Growth-Share Matrix*' released by Bruce Henderson

1993:

'*Reengineering the Corporation*' released by Michael Hammer and James Champy

STRATEGY HISTORY & EVOLUTION

2500+ years of strategy mainly benefits 3 professions

Warmongers

- Winning wars
- Avoiding wars

Business Leaders

- Monopolies
- Building Power

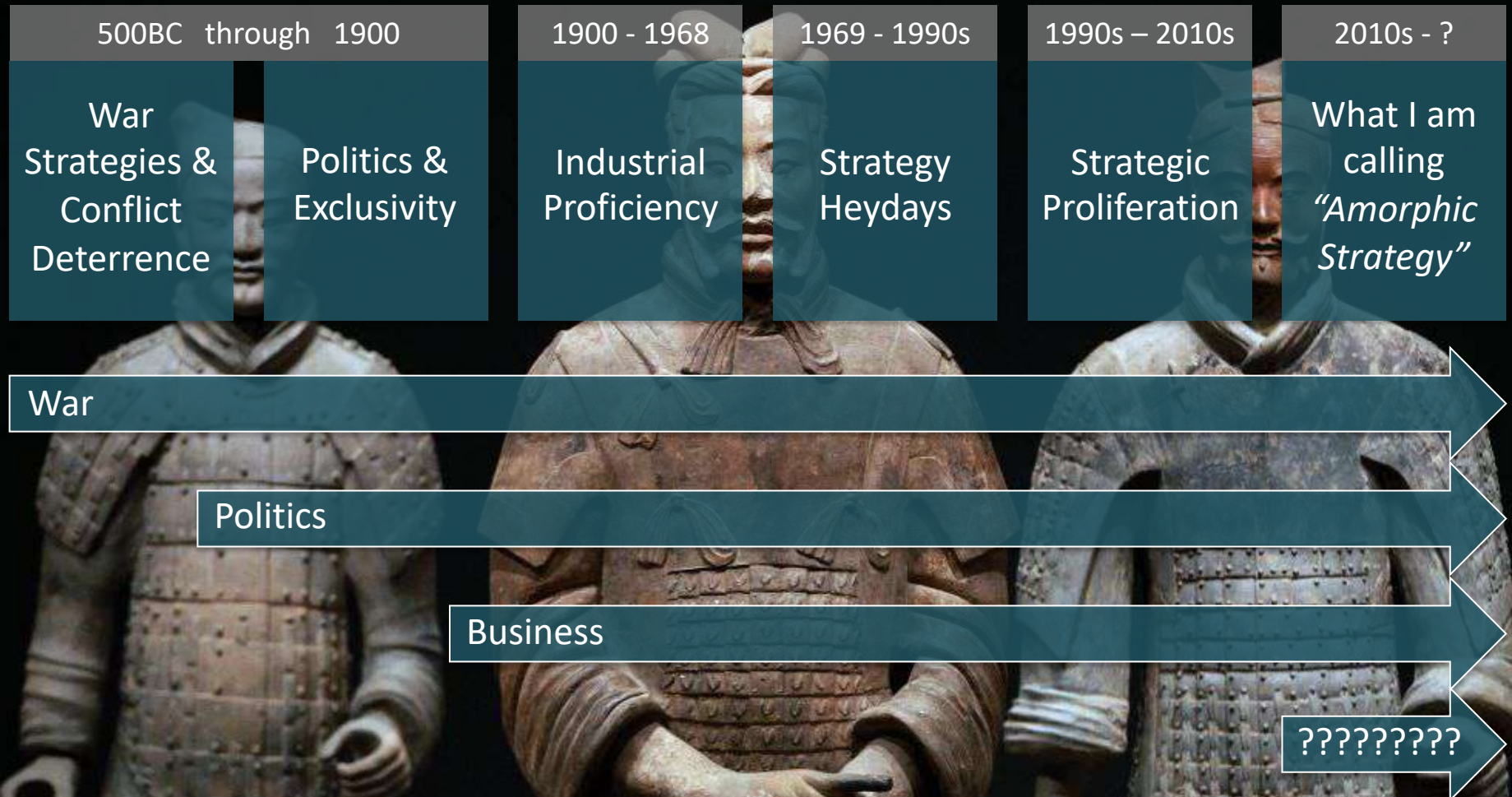
Politicians

- Gaining power
- Holding power

← 2500+ Years →

STRATEGY HISTORY & EVOLUTION

strategy has gone through multiple changes



Reference: ATKearny – The History of Strategy and Its Future Prospects

— STRATEGY HISTORY & EVOLUTION —

‘war strategies & conflict deterrence’ phase 500BC – 1900

“Winning a
battle without
fighting is the
best way to
win”



Sun Tzu
“The Art of War”

‘politics & exclusivity’ phase 500BC – 1900

“It is better to be
feared than loved,
if you cannot be
both”

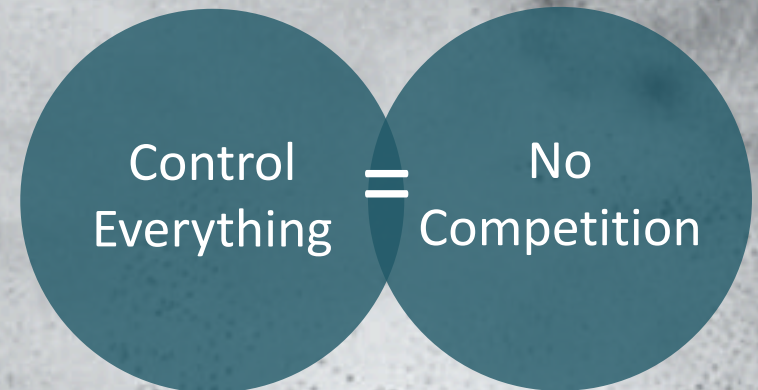
A portrait of Niccolò Machiavelli, a man with dark hair, a slight smile, and a red collar, looking slightly to the left. The background is a textured, brownish-gold.

Niccolo Machiavelli

*“Father of Modern
Political Science”*

— STRATEGY HISTORY & EVOLUTION —

'politics & exclusivity' phase 500BC – 1900



John D. Rockefeller
Standard Oil

— STRATEGY HISTORY & EVOLUTION —

‘industrial proficiency’ phase 1900 – 1968

A black and white portrait of Peter Drucker, an older man with a serious expression, holding a pair of glasses in his right hand. He is wearing a dark sweater over a collared shirt. The background is dark and out of focus.

Strategy
summarized
as *‘Competition
on price’*

Peter Drucker
*“Father of Modern
Management”*

— STRATEGY HISTORY & EVOLUTION —

‘strategy heydays’ phase 1969 – 1990s

Do what
everyone else is
doing, but spend
less money
doing it.

Do something no
one else can do.

Michael Porter
“What is Strategy”

STRATEGY HISTORY & EVOLUTION

'strategic proliferation' phase 1990s – 2010s



STRATEGY HISTORY & EVOLUTION

'strategic proliferation' phase 1990s – 2010s

| | | | |
|---------------------------------------|--|---|---|
| BCG Matrix | Dynamic Capabilities Teece | Organizational Absorption | Strategy Change Cycle Bryson |
| Benchmarking | E-Business | Organizational Agility | Strategy Dynamics Warren |
| Bisociation Koestler | E-Commerce | Organizational Configurations Mintzberg | Strategy Execution |
| Black Swan Theory Taleb | Economies of Scale | Organizational Development Lewin | Strategy Map Kaplan Norton |
| Blue Ocean Strategy Kim | EFQM | Organizational Resilience | Strategy Process Steps Armstrong |
| Bottom of the Pyramid Prahalad | Emergent Strategy | Organization Chart | STRATPORT Larreche |
| Bounded Rationality Simon | Emerging Markets | Outsourcing | Stretch Goals Welch |
| BPR Hammer Champy | Enterprise Architecture Zachman | Paralysis by Analysis | SWOT Analysis |
| Brainstorming | Entrepreneurial Government Osborne | Parenting Advantage Goold Campbell | Supply Chain Design |
| Brand Loyalty | E-Procurement | Parenting Styles Goold Campbell | Sustainable Competitive Advantage |
| Brand Recognition | Exit Strategy | PARTS Brandenburger | Synecrises Gordon |
| Bricks and Mortar | Extended Marketing Mix 7P's | Parasitism Parachute | Systems Thinking / Dynamics Forrester |
| Business Assessment Array | External Environment | People Pill | Tacit Knowledge |
| Business Cycle | Factor Endowments | Performance Categories Baldrige | Targeted Repurchase |
| Business Incubator | False Consensus Bias | Performance Management | Target Marketing |
| Business Intelligence | Feedback Loops | Personal Belief Bias | Technological Forecasting |
| Business Interruption Insurance | First-mover Advantage | PEST Analysis | Ten Schools of Thought Mintzberg |
| Business Models | Five Forces Porter | Plausibility Theory | Theory E and Theory O Beer Nohria |
| Business Process Reengineering Hammer | Flip-in | Poison Put | Theory of Constraints Goldratt |
| Champy | Flip-over | Portfolio Agility | Theory of Reasoned Action Ajzen Fishbein |
| Buy-Side Analyst | Force Field Analysis Lewin | Portfolio Analysis | Three Dimensional Business Definition Abell |
| Cannibalization | Forget Borrow Learn Govindarajan Trimble | Pressure Group | Time to Market |
| Capacity Utilization | Franchising | Price Skimming | Top-down Approach |
| Capital Budgeting | Friendly Takeover | Problem Analysis Tree | Trade Marketing Mix |
| Cartel | Game Theory Nash | Product Life Cycle Levitt | Trajectories of Industry Change McGahan |
| Catastrophe Theory Thom | GE Business Screen | Product/Market Grid Ansoff | Triple Bottom Line Elkington |
| Causal Ambiguity | Globalization | Profit Pools Gadiesh, Gilbert | Turnaround Management |
| Centralization and Decentralization | Glocalization | Rätselvermehrung Heinsohn | Twelve Principles of the Network Economy |
| Ceteris Paribus | Golden Parachute | Real Options Luehrman | Kelly |
| Chain of Command | | | |
| Chairman of the Board | | | |

But as the strategies piled up, so did the complexity...
...rendering many organizations in a paralysis state

'strategic proliferation' phase 1990s – 2010s

Prerequisite
for Success

Compelling Vision,
Bold Leadership &
Decisive Action

Prerequisite
for Failure



Michael E. Raynor
"The Strategy Paradox"

'strategic proliferation' phase 1990s – 2010s

The Strategy Paradox
is a collision between

Commitment Uncertainty

Leaders must make choices
based on assumptions about a
future they cannot predict.



Michael E. Raynor
"The Strategy Paradox"

what's next? 2010s onward

Amorphic Strategy

Adapting quickly to change

- Data & analytics + 'big data'
- Technology advancements
- Industry disruption
- Market trending
- Geopolitical influences
- Generational motivations
- Progress in Machine Learning and Artificial Intelligence

↑
simultaneity
↓

...Amorphic Strategy will be applied to EVERYTHING!

let's redefine strategy for today's world...

*A strategy is a set of **guiding principles** that, when communicated and adopted, generates a desired **pattern of integrated decision making**.*



Old Definition: A strategy is a careful plan or method, usually over a period of time, to achieve a specific goal.

Effective Strategy Application

2

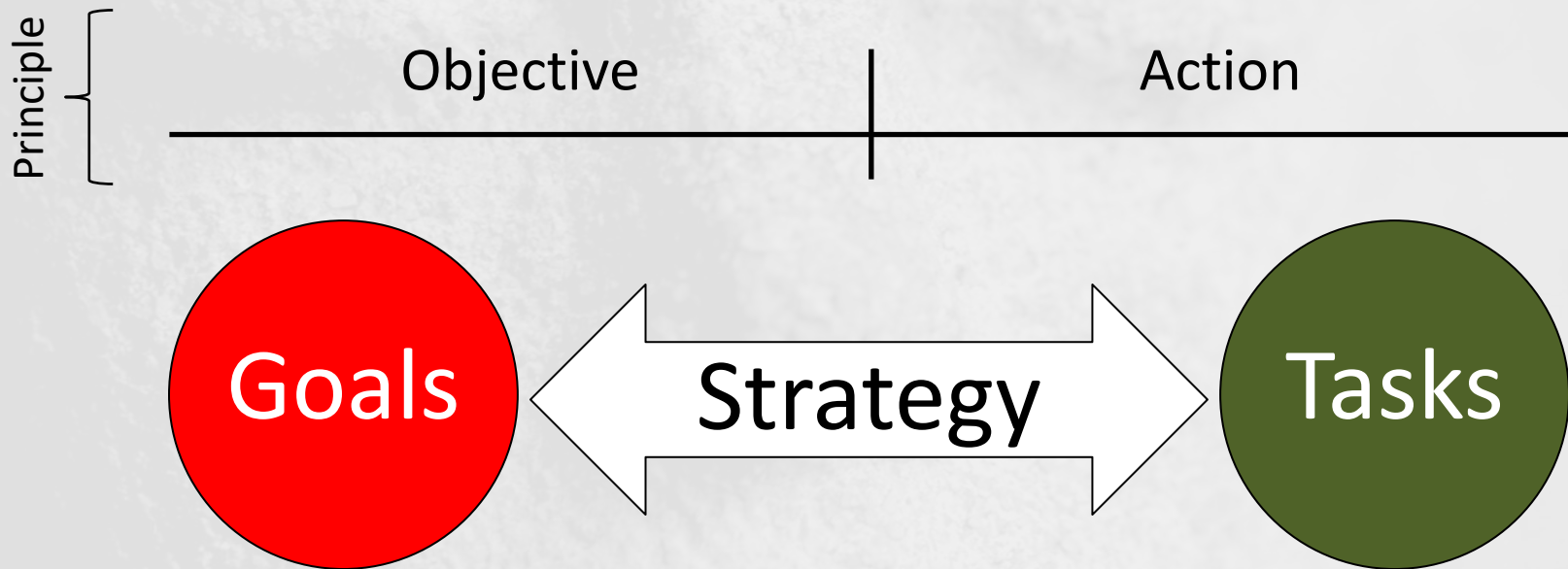
Thought Leadership



Action

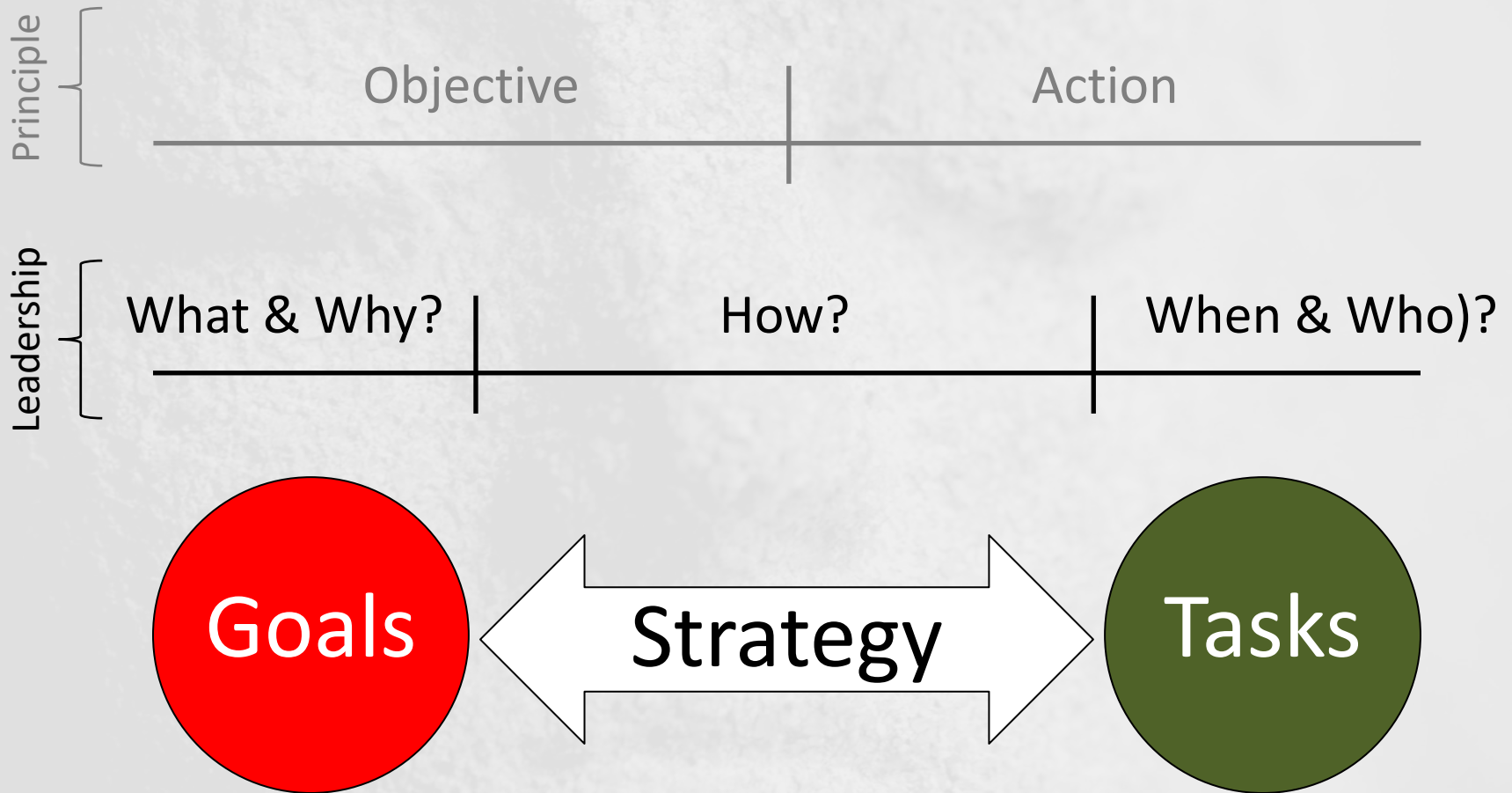
strategy simplified #1 of 4





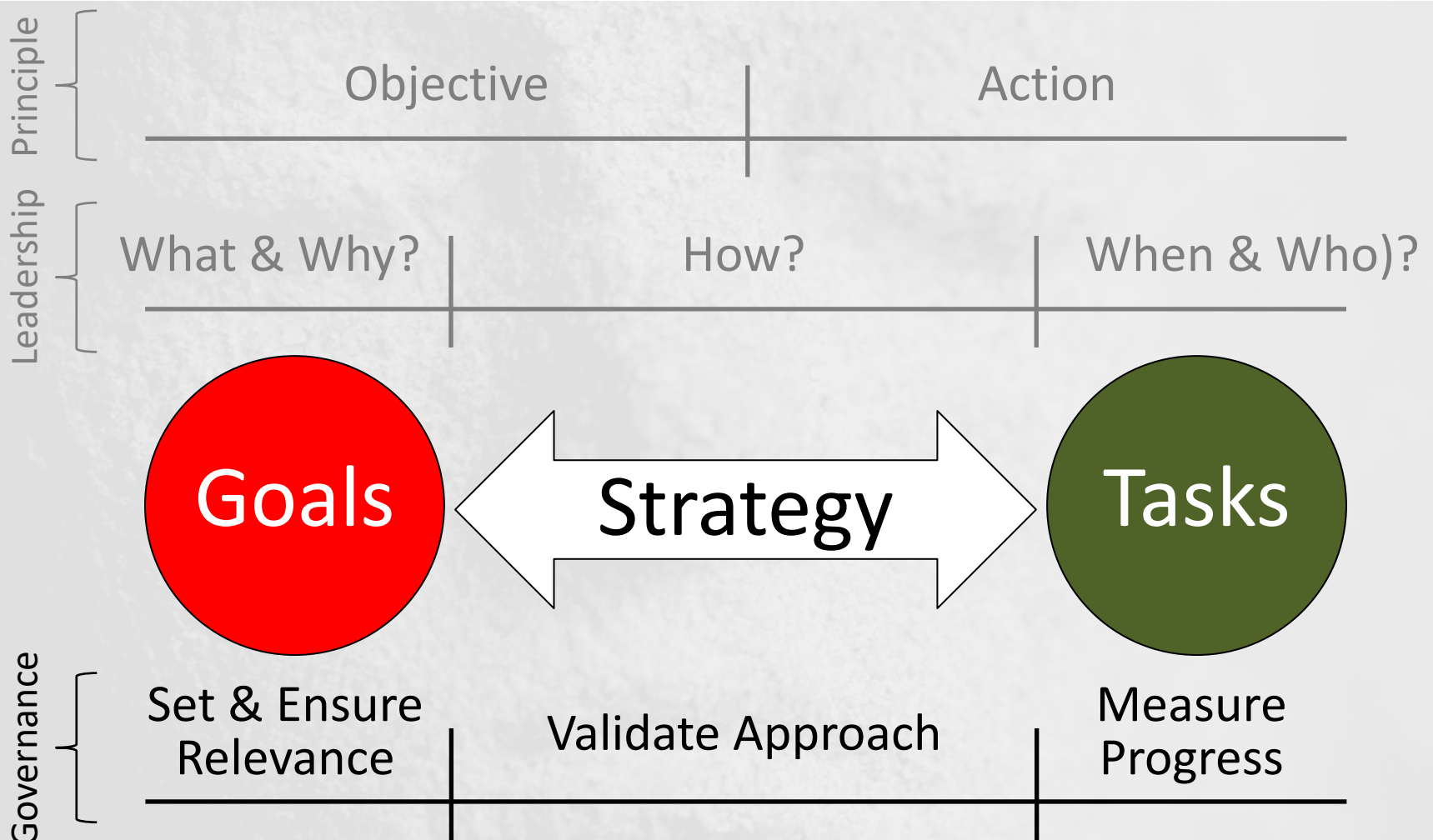
EFFECTIVE STRATEGY APPLICATION

strategy simplified #3 of 4

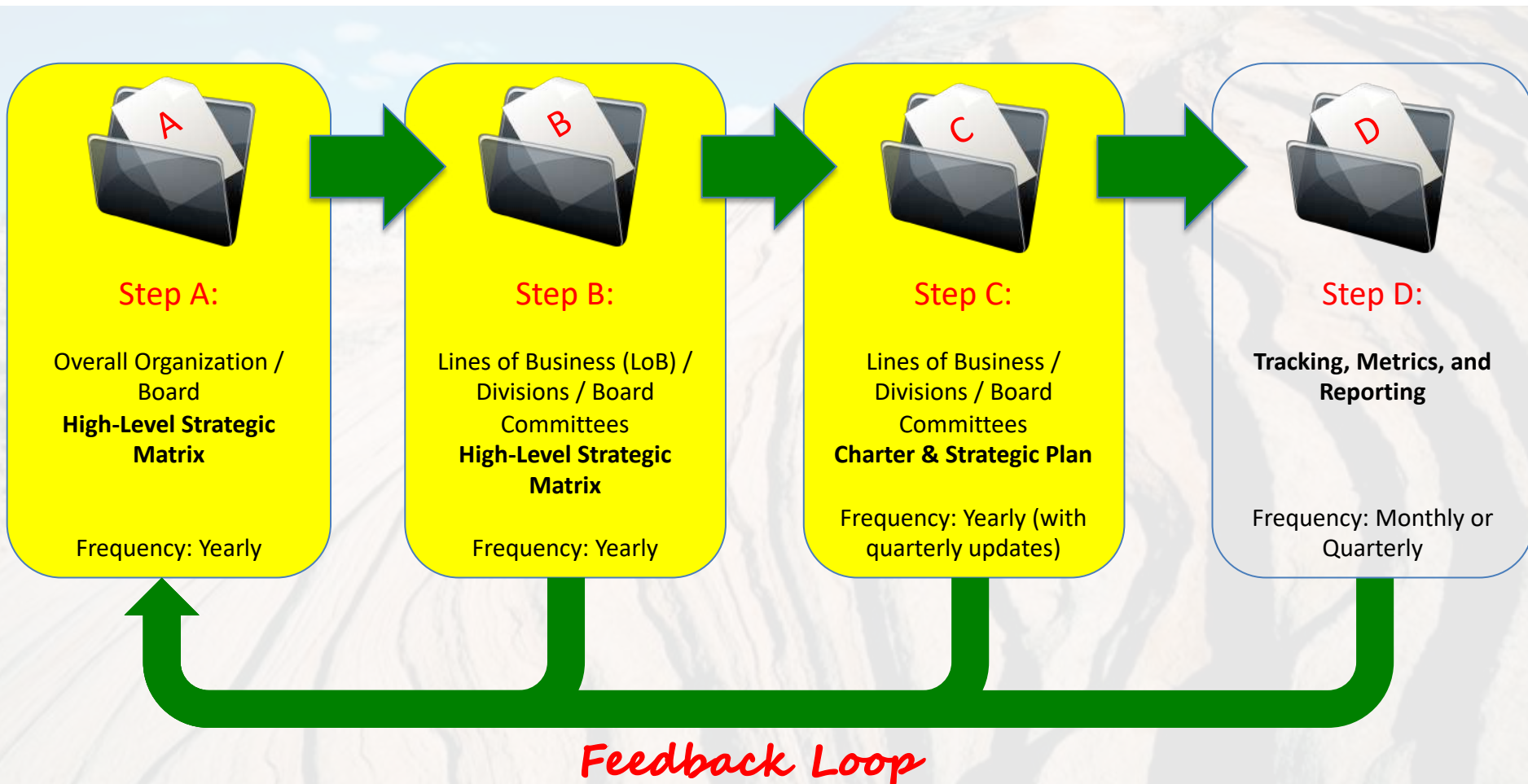


EFFECTIVE STRATEGY APPLICATION

strategy simplified #4 of 4



the strategic process



EFFECTIVE STRATEGY APPLICATION

Step A

overall organization / board - high-level strategic matrix

| Nonprofit Example – Overall Organization | | | | | |
|--|--|------------|---------------------------|------------------------|----------------|
| Topic | Goal | Focus | Focus | Focus | Focus |
| Membership | Increased org. membership (500 new members in 2020) | Marketing | Programs | Incentives | Outreach |
| Opportunity | Expanded member involvement (2 new programs in 2020) | Trending | Surveys / Polling | Member Roles | Awards |
| Visibility | Expanded presence (national digital footprint in 2020) | Volunteers | Development (fundraising) | Digital Transformation | Tech Savviness |
| Insights | Most trusted source of xyz information / data (trusted source by end of 2021) | Content | Publications | Library | |

Step B

LoB / Division / Board Committee - high-level strategic matrix

Nonprofit Example – Marketing Committee (Board)

| Topic | Goal | Focus | Focus | Focus | Focus |
|--------------------|--|--|---|--|--|
| Membership | Increased org. membership (500 new members in 2020) | Publish monthly program offers | Research / propose 'sticky' member incentives | Allocate 10 hours per month to Outreach group | |
| Opportunity | Expanded member involvement (2 new programs in 2020) | New program launch template | Create reusable Survey / Polling format | Outreach templates for Member Roles | Set / publish parameters for member Awards |
| Visibility | Expanded presence (national digital footprint in 2020) | Document / publish volunteer opportunities | Development (fundraising) | Publish details / progress of digital transformation | Create signup format for Tech training (internal & ext.) |
| Insights | Most trusted source of xyz information / data (trusted source by end of 2021) | Create and manage content calendar | Format monthly publications | Sell advertising on member library | |

EFFECTIVE STRATEGY APPLICATION

Step C

LoB / Division / Board Committee – charter & strategic plan

Nonprofit Example – Marketing Committee (Board) – one horizontal

<< LoB / Division / Committee >>: Charter / Strategic Plan

| Charter (Strategic) | | | Planned Delivery (Tactical) | | | |
|--|---|--|--|---------------------------|--------------|-------------|
| TOPIC / GOAL | SCOPE (Focus Areas) | KEY OUTCOME | Milestones (Chronological Order) | Date Target | Revised Date | RAG Status |
| Membership / Increase Org. Membership (500 new members in 2020) | Publish monthly program offers | Consistent and timely offers for revenue-generating program signups and attendance | Understand membership program needs | 1/8/20 | 1/9/20 | Completed |
| | | | Align upcoming 12 months of programs with Board | 1/15/20 | - | Completed |
| | | | Finalize marketing material for each month's program | 7/15/20 | - | In progress |
| | | | Disseminate program marketing material per schedule | Monthly (3 weeks prior) | - | In progress |
| | Research / propose 'sticky' member incentives | Leverage existing members to help spread the organization's message leading to new signups | Receive approved incentives list from Board | 3/3/20 | - | Completed |
| | | | Align marketing approach and plan | 6/12/20 | 6/14/20 | Completed |
| | | | Publish overall incentive plan to membership | 6/28/20 | - | Completed |
| | | | Publish member training session dates | Quarterly (3 weeks prior) | - | In progress |
| | Allocate 10 hours per month to Outreach group | Integrate marketing activities directly with outreach needs for holistic approach | Publish incentives quarterly | Quarterly (1 week prior) | - | In Progress |
| | | | Q1 allocation outcome | 4/5/20 | - | Completed |
| | | | Q2 allocation outcome | 7/5/20 | - | Completed |
| | | | Q3 allocation outcome | 10/5/20 | - | Completed |
| | | | Upcoming year allocation plan | 11/15/20 | - | In progress |
| | | | Q4 allocation outcome | 1/15/20 | - | Completed |

Goals

Strategy

Tasks

The Strategy Workshop

Before discovery, planning, and implementation efforts sits the most important determinate of success - **Strategy**.

This workshop can be applied to overall company approach, specific initiatives & projects, or professional / personal aspirations. Designed for all organization types - public, private, & nonprofit.



M. A. Pfister
Strategy Group

BUILD YOUR STRATEGY

go forth and conquer

1

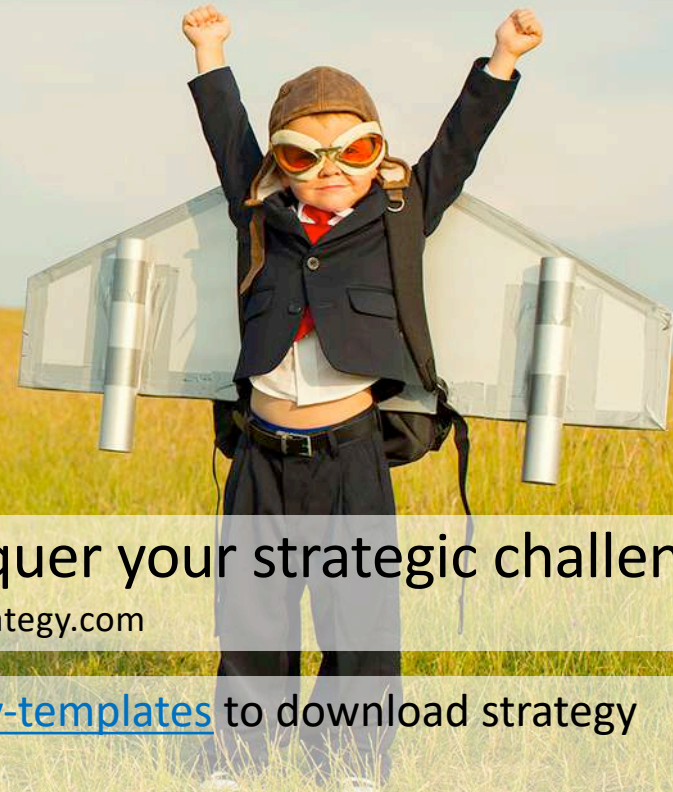
Create a pattern
of integrated
decision making

2

Have your
'go-to'
path

3

Embrace
change!



Share with me how you plan to conquer your strategic challenges!

Mark@PfisterStrategy.com

Be sure to visit www.PfisterStrategy.com/strategy-templates to download strategy templates referenced in this webinar.

Follow my strategies at www.PfisterStrategy.com



With a strong focus in Strategy, Governance, and Technology / Cybersecurity, Mark A. Pfister is CEO & Chief Board Consultant of M. A. Pfister Strategy Group, an executive advisory firm that serves as a strategic advisory council for executives and Boards in the public, private, and nonprofit sectors. He is also Chairman & CEO of Integral Board Group, a specialized Board services and consulting company. Mr. Pfister is a '*Board Macro-Influencer*' and his success has been repeated across a wide range of business situations and environments. He prides himself on being a coach and mentor to senior executives and directors. In Board Director circles, Mr. Pfister has earned the nickname '*The Board Architect*.'

The overarching theme throughout his career has been his aptitude in leadership positions, passionate focus on people, unique governance models, and ability to create value for stakeholders through innovative business strategies and operational excellence. Michael Lorelli, Executive Chairman of Rita's Franchise Company, has said, "*Mark's unusual combination of excelling at a macro and micro grasp of business, genuine interest in Governance, and ability to coach and mentor a Management Team make him a terrific Independent Director.*"

Mr. Pfister is a certified project management professional and frequently serves as an expert Project Executive, consulting on global projects in their initiation and operational phases, as well as programs requiring remedial focus to bring them back on track. He has deep knowledge and experience in Board design & operations, strategic planning, business transformation, technology implementations, decisioning processes, continuing education programs, executive coaching, and governance models.

Previously, Mr. Pfister was CEO of Pro4ia, Inc., an international consulting and professional services company specializing in a wide range of technology solutions utilizing formal Project Management as a proven and repeatable delivery method. With a Fortune 50 client list, Pro4ia was Citibank's Nominee for Crain's Magazine '*Entrepreneurship of the Year*' Award in 2005. He simultaneously served as CEO of Onit, Inc., a national sourcing company specializing in placements for all levels of technology skill sets. Mr. Pfister was also the National Program Office Leader for American Express leading some of the largest technology transformation initiatives in the company's history. He served as a Licensed Engineering Officer in the U.S. Merchant Marine, holds a B.S. from the State University of New York Maritime College in Facilities Engineering, and completed Harvard Business School's Executive Education Program for Board Directors.

Mr. Pfister is the creator of the '*Board as a Service*' (BaaS) engagement model, an industry he is credited with inventing. He is a Master Speaker and conducts national speaking tours, lectures, and seminars focused on effective leadership, strategy, Board architecture, becoming an exceptional Board Director candidate, professional project/program management, and entrepreneurship.

His popular book, '*Across The Board: The Modern Architecture Behind an Effective Board of Directors*,' an Amazon best-seller with copies in circulation in over 70 countries, has influenced an entire new generation of Board Directors.

Mr. Pfister is a proficient Board Director and CEO with experience across multiple industry verticals. He is typically the Chair, or a member of the Strategic Planning Committee, Governance Committee, Technology & Cybersecurity Committee, and Nominating Committee. Mr. Pfister's experience as a renowned Board Consultant, having guided and coached hundreds of Boards, Board Committees, and Board Members, additionally offers up unique and informed viewpoints to the companies he serves.

He holds an *Executive Masters Professional Board Certification* through the American College of Corporate Directors (ACCD), is a member of the National Association of Corporate Directors (NACD), is a certified *Project Management Professional* (PMP) through the Project Management Institute (PMI), is a Global ESG Certification candidate (anticipated completion November, 2020), and holds a *Certified Cyber Intelligence Professional Board Certification* (CCIP) through the McAfee Institute.