



## **2 Parts Enlightenment, 1 Part Truth, and a Smidge of Creation**

By Nilofer Merchant

Building a really strong defense strategy means building a common, clear vision of what is, then creating alternative scenarios for what could be, then developing a plan for defensive moves and offensive pushes.

A colleague is preparing a competitive defense strategy, and talked to my team recently about what to do to prepare. We helped him in terms of process steps: the need to build a common data set, do some role playing that will break traditional roles people already serve in the organization, and then ways to architect new solutions that could leverage the full company arsenal (vs. product business units). Together, that would allow them the process steps to design a competitive strategy that'll go to the board for investment decisions.

We talked and emailed a bit to offer advice as he gets his project off the ground. Yet, I was left not saying one thing that I think is central to what he's going to need to manage in terms of process.

Most high-tech firms have this phenomena: Executives go to meetings to make a point. They don't often think together to *explore a subject* but tend to use thinking to *parade their egos*. And because most execs are incredibly smart, I've seen a lot of sessions go on where people come to "spout off" rather than exchange ideas.

But doing a defense strategy (or a new market expansion plan, etc) needs more than spouting off what we already know to and at each other. Building a really strong defense strategy means building a common, clear vision of what is, and then creating alternative scenarios of what could be to then develop a plan for defensive moves and offensive pushes. Sounds so easy but man, oh, man are there pitfalls in what people need to manage when driving this.

I'm going to suggest there's 3 things a major strategy session needs to be designed for...

### **1. Enlightenment**

Clear understanding through logic or inspiration. You might get a picture that fasting is involved. But no. In the business context, enlightenment has to be about setting aside the ego, to get clear about facts and figures. When the ego is at play in business, it shows up when people use their thinking to parade their egos, to put others down, to show how clever one is ... individuals sometimes do a group discussion when they are so busy advocating their genius moments, or listening to others, they sometimes don't stop to think. Enlightenment therefore needs to be a primary part of strategy development by getting people to see the facts, without the arguments. To find out what information do we have, what information do we need, and what is missing that

we need to learn. It is also a great opportunity to see if something is a fact, or a likelihood, or a belief.

## **2. Truth**

A commitment to honesty and clarity. This experience plays an important role in most personal relationships, but it also is a key component of companies. We see it in brands like Whole Foods, Volkswagen, and Newman's Own, all of which portray themselves as simple, upright, and candid. Rubicon describes in our literature as "we don't kiss hands or anything else." Cheeky but true. Companies that can get a clear picture of the ultimate truth can create a great deal of alignment. And to be clear, truth is more than facts and figures, it is also our feelings and hunches, our options, our risk assessment, our values and desires. It is in essence the fullest range of "what is". Most leadership teams don't often allow for our impressions without a need to justify those. And, we often don't look directly at risks, dangers and difficulties. To seek truth is to make sure you are looking at and making visible many things, without judgment.

## **3. Creation**

The sense of having produced something new and original, and in so doing, to have made a lasting contribution. Besides telling stories, doing hobbies, decorating our home, or styling our selves, the way this comes out is creative thinking to go beyond "what is" to "what can be" and look and see something that is a way forward that hasn't been done before. On a personal level, it's the same reason that we like to create our own custom pizzas when the 10 menu choices could cover 99% of our desires. At business, we need to build new options by a design stage. Some people start this part of a meeting or workshop by saying "all ideas are good ideas". Yet, they don't manage to it. That's because there are people whose self-importance perhaps even self-definition is tied to their ability to assess or do critical thinking. They are they people who say..."Yes, but". Even if 85% of the idea is excellent, the tendency is to focus on the less excellent 15%. Yet creation is about building on the 85% and turning it around to keep improving the idea. Most people cannot see the intrinsic benefit in an idea. They focus instead on how it doesn't fit. I don't know where I personally built the skill but along the way, I can find a good idea in just about anything. I'm serious: talks, books, people, to the totally nonsensical items... Maybe that's why I'm an entrepreneur and fairly good at this strategy creation business. Finding value in anything that those around you have not spotted means you are finding value and benefit that are not obvious to others. That's a rare skill and worth building.

The funny thing about doing new vision or defense strategy sessions is this: The answers are not obvious. If it were, you'd already be doing it. So when it comes to doing a big thing like a "defense strategy" or "3-year planning", it's really important to leave our natural tendencies (egos, confusion, critical thinking) at the door. None of the brilliant ideas can get started until someone shares and others listen, until people bring all truth to bear without judging one another for intuition or risk assessments, and then jointly nurture a seedling of an idea into a vision that builds one another's ideas.