

Strategist: Role and Attributes



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INTRODUCTION

The role and purpose of a strategist is a neglected area in strategic management (Dameron & Torset, 2014; Montgomery, 2012). Writers in the area of strategic management such as Andrews (1971), Mintzberg (1973) or Quinn (1988) showed little regard for the strategist in their early work. Mintzberg (1994) was one of the first to recognise the importance of the strategist. The theme strategy as practice is an approach adopted by Whittington (1996, 2003) who recognized the place of the strategist in strategy development. This was also taken-up by (Bowen, 2002) in his doctoral thesis.

Strategy can be viewed through several lenses and thus different views of “reality”. To construct the reality a discourse on strategy is an important step (Dameron & Torset, 2014). To analyse this reality Hardy and Philips (2004, and 1997) propose three perspectives concepts, objects and subjects. These categories enable an understanding on how people represent themselves in their own discursive conversations and thus constructing their own legitimacy (Oswick et al., 2000). Dameron and Torset (2014) suggest that strategists’ discourse on their practices and activities are the essence of what constitutes strategy.

Strategy is not a detached analytical exercise (Dameron & Torset, 2014 and Montgomery, 2012). Strategy is characterised in a survey of 2000 executives by plan, direction and competitive advantage but only 0.001% of the sample used the terms leadership or visionary i.e., working with people. Tellingly the word strategist was not associated with strategy (Montgomery, 2012).

The aim of this paper is to define the characteristics and role of a strategist and add to the limited research in this area of strategy.

HOW STRATEGISTS LEARN

Organisational knowledge can be theoretically categorised as tacit and explicit (Grant, 1996 & Spender, 1996). There are other forms of knowledge transactional knowledge (Reagans, Argote, & Brooks, 2005), and procedural knowledge and declarative knowledge (Moorman and Miner, 1998). Explicit knowledge is based on experience and gives rise to “rational” strategy in unpredictable environments. Organisational processes are guided by rational strategies and are responsible for value creating strategies and are more effective than information-demanding approaches (Bingham & Eisenhardt, 2011). Knowledge that is explicit improves process performance over time (Bingham & Eisenhardt, 2011). Organisational routines are learnt from process routines and are patterns of actions that contribute to organisational learning repositories and are linked to lessons based on experience (Bingham & Eisenhardt, 2011; Feldman,

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2000; Levitt & March, 1988). A third approach to organisational learning suggests that heuristic is a cognitive shortcut, when information, time and processing ability is limited (Newell & Simon, 1972). Heuristics are opportunity spotters i.e. opportunities to pursue, opportunities to execute, opportunities that are acceptable for ranking and opportunities that should be dropped. Organisational routines are ways to theorise what has been learnt (Bingham & Eisenhardt, 2011). Firms with higher opportunity-capturing heuristics have higher performance organisational processes (Bingham et al., 2007). Davis et al (2009) found the “simple rules” strategy based on a few heuristics is viable in stable environments and a requirement for unpredictable ones. Strategists operate across the organisation and would gain both tacit, explicit, procedural, declarative and transactional knowledge. They are in one of the “best” places in the organisation to develop heuristics routines that have organisational significance. However, this require strategists taking a leadership role, which was not a characteristic associated with them.

STRATEGIST ROLES

Mintzberg (1994) argues that the planner’s greatest contribution is in the analysis of the hard data. The planner’s role is around the strategy-making process and not “inside it”. To Mintzberg (1994) planners play a supporting role, they ask the “right” questions. According to Mintzberg (1994), planners are categorised as follows: strategy finders (look for emerging strategies) catalysts (encourage managers to think creatively and to challenge the status quo) and analysts (traditional view of a planner, they carry out analysis of issues). A planner can be “right-handed”, a planner in the traditional mode or “left-handed”; this type of planner is less conventional and is looking for nuggets of information. Mintzberg (1973, & 1994) challenges the established wisdom that managers are “reflective, and systematic planners”. According, to Mintzberg (1994) the planners cause “turbulence”, because their formal planning procedures are inflexible. Campbell (1999, p. 43). adds

This much is clear; when it comes to planning, corporate managers must limit themselves to giving advice in areas where they know they can add value.

Mintzberg (1994) suggests a planner’s greatest contribution is in the field of analysis. In this role, they play a supporting role. He also suggests that another type of planner exists, they are the thinkers looking, for emerging strategies. Which of Mintzberg’s (1994) two models of the strategic planner is correct? It is reasonable to speculate that both types of planners exist. However, the effectiveness of one type of planner over another depends on the market environment. When a market is changing very little over time the understanding in detail may give a company a competitive advantage, which is only sustainable if the status quo remains. A traditional planner would do a good job in this environment. To hypothesise briefly let us place the traditional planner in a dynamic, complex and uncertain environment. Will the planner still perform effectively? If the traditional planner uses the hard data skills, then it is unlikely he will survive. In the uncertain, dynamic and complex environment, data for analysis is scarce, out of date (because the market changes rapidly) or just wrong. The lack of data could prove a problem for the traditional planner. This environment requires planners to look for insights and look for patterns to build an understanding of the environment. The role of the planner is to produce qualitative information, rather than quantitative information. In fact, the planner must be flexible and adaptable and be able to manage in any environment. An inflexible strategy formulation process may hamper even a “left-handed” planner. Above all planners must know their limitations, otherwise they may be giving bad

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