Strategic Thinking & Systems Leadership

Advanced Chapter Leadership Workshop

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History

The DISC Model of Behavior was first proposed by William Moulton Marston, a physiological psychologist with a Ph.D. from Harvard. His 1928 book, *Emotions of Normal People*, explains his theory of how normal human emotions lead to behavioral differences among groups of people and how a person's behavior might change over time. His work focused on directly observable and measurable psychological phenomena.

Source: The DiSC Styles - DiSC Profile



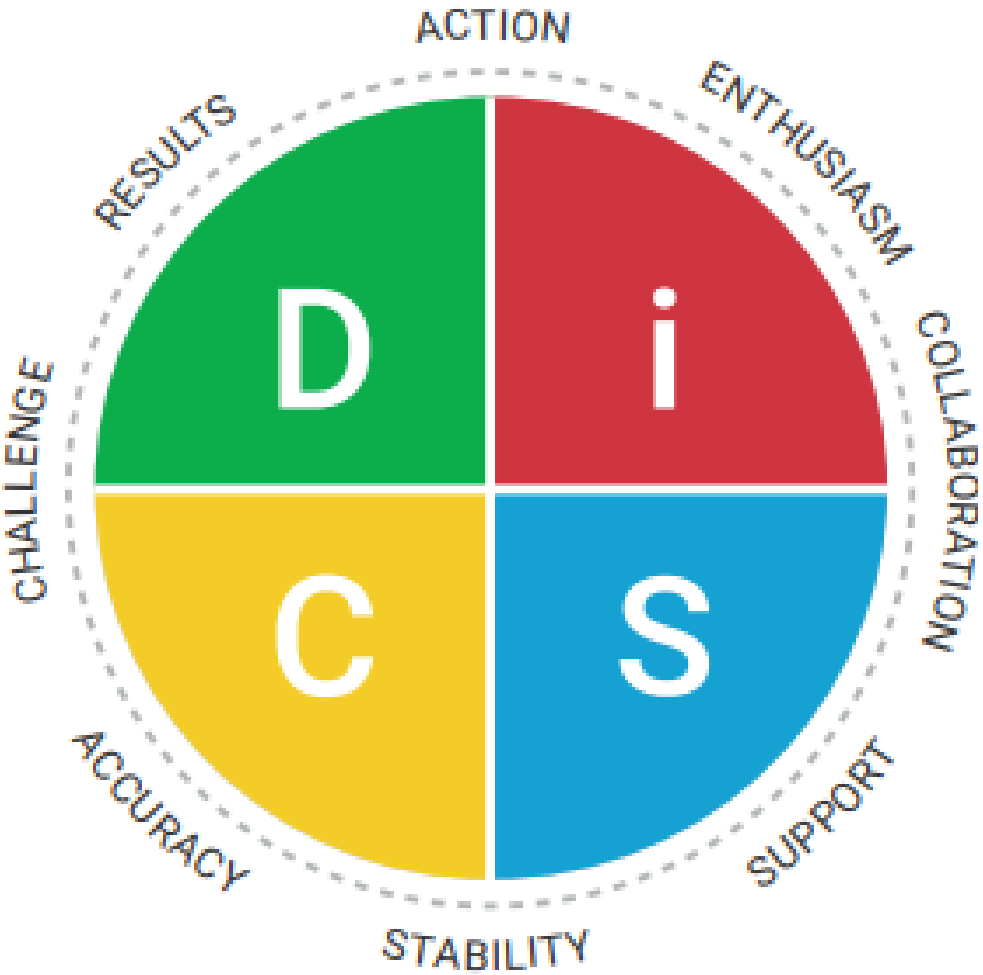
DiSC Profile

Dominance

influence

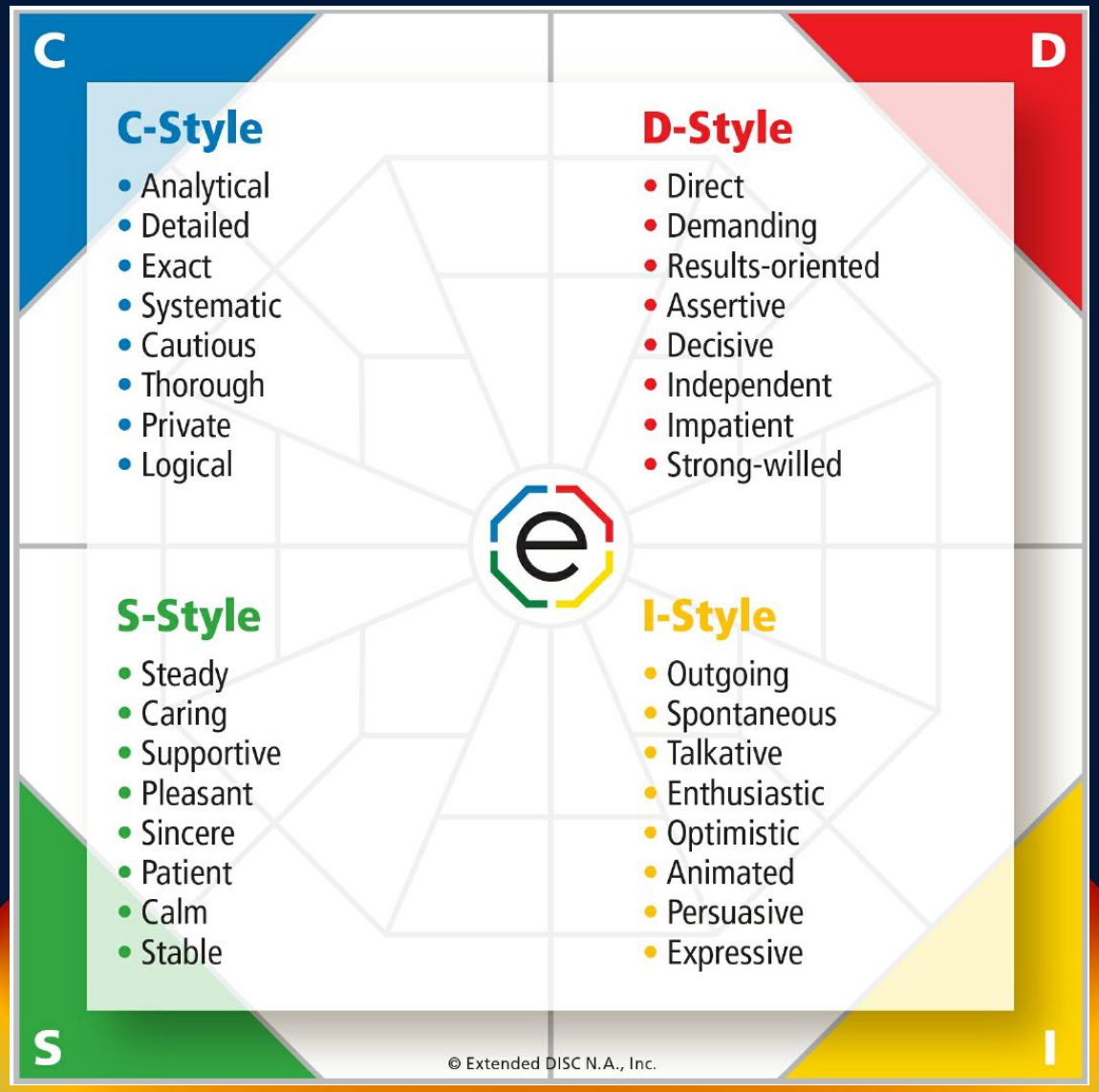
Steadiness

Conscientiousness



First and foremost, DiSC profiles are about self-knowledge and communication. They are designed to help improve cooperation, boost the performance of teams, and improve the effectiveness of volunteer leaders.

DiSC profiles provide a common language that people can use to help better understand themselves and their colleagues and then use that knowledge to adapt their behaviors and improve relationships.



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D: Be brief and outcome-oriented. Offer options, timelines, and authority boundaries.

C: Be precise and evidence-based. Provide data, criteria, risks, and clear definitions.



i: Be interactive and positive. Share the “why,” invite ideas, recognize contributions.

S: Be calm and structured. Explain impacts, provide reassurance, allow time to adjust.

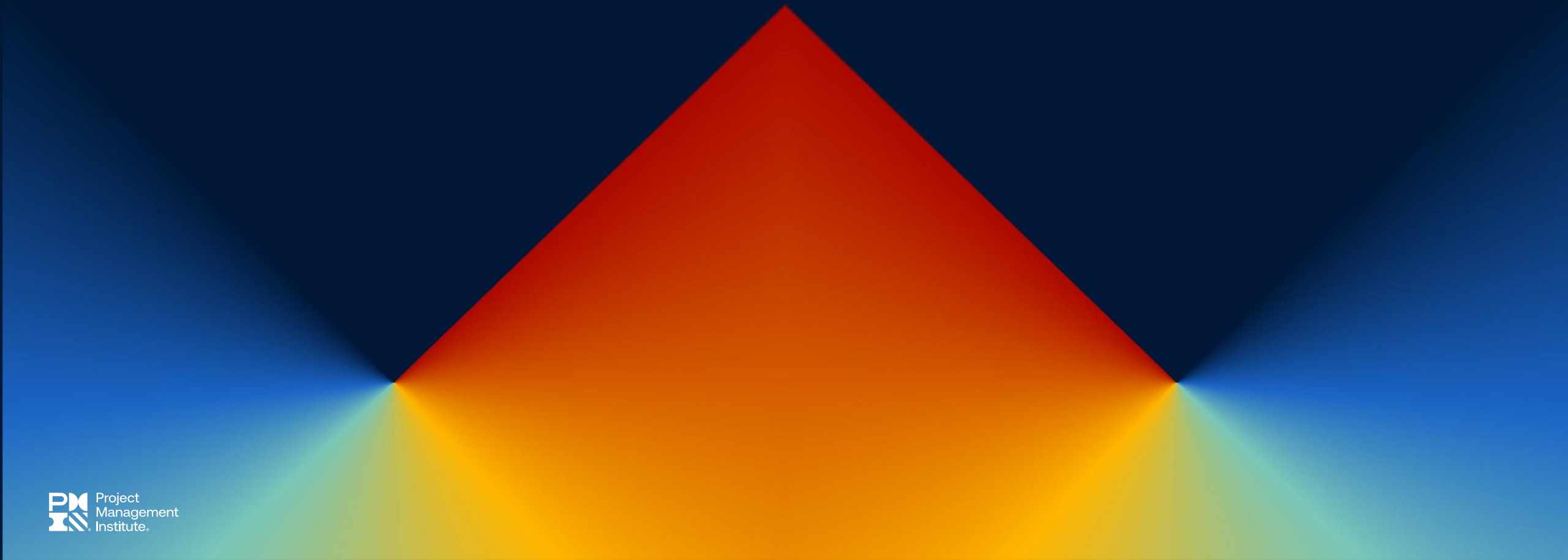
Purpose & Outcomes

This fast-paced workshop strengthens your ability to think beyond today's delivery work and lead staff & volunteers with a clearer "why/what's next."

By the end, you'll will be able to:

- Articulate the distinction between strategic thinking, strategic planning, and tactical problem-solving.
- Apply the 3 A's in Action framework — Acumen, Allocation, and Action — to a realistic scenario.
- Identify at least two concrete habits or practices they can adopt to cultivate a more strategic mindset.
- Recognize how strategic thinking enhances volunteer alignment, risk anticipation, and value delivery.

Strategic Thinking



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Strategic Thinking Workshop

Systems thinking explains *why things happen the way they do*.

Strategic thinking decides *what to do to win or succeed*.

"Across the project professionals surveyed, regardless of region, industry, years of experience, leadership level, or Project Management Professional (PMP)® certification status, there was consensus around the most critical power skills: communication, problem-solving, collaborative leadership, and **strategic thinking**."

PMI press release, *PMI Pulse of the Profession® 2023 Report Shows the Value of Power Skills in Project Success* (29 November 2022)

The Strategic Importance for Leaders

Dimension	Strategic Planning	Strategic Thinking	Problem Solving
Frequency	Periodic (annual or quarterly)	Continuous, daily mindset	As-needed, event-driven
Time Horizon	Near-to-medium term	Long-term, future-oriented	Immediate
Orientation	Structured and process-driven	Creative, exploratory, and adaptive	Analytical and corrective
Scope	Organizational or portfolio level	Individual and collective competency	Specific issue or constraint
Primary Question	*What* will we do?	*Why* and *how* should we think about this?	*How* do we fix this?
Value Created	Alignment and resource commitment	Innovation, foresight, and competitive advantage	Stability and continuity

Strategic Thinking: What It Is, and Isn't

- Strategic thinking is not a once-a-year, off-site activity
- Strategic thinking is a mindset
- In a BANI* world – this mindset is no longer optional
- 4-7% of leaders are considered skilled strategic thinkers

***B**rittle – systems look strong but break under stress.
Anxious – people and organizations live in constant stress and anticipatory fear.
Nonlinear – small causes can create huge, disproportionate effects.
Incomprehensible – reality feels beyond our ability to fully understand.

Center for Creative Leadership (CCL). (2011). Strategic thinking: An executive development imperative. CCL.

3 A’s - Framework for a Structured Approach

- Acumen – Understand the landscape
- Allocation – Make deliberate choices
- Action – Execute with strategic intent

"Make Strategic Thinking Actionable"

Horwath, R. (2013). Elevate: The Three Disciplines of Advanced Strategic Thinking. Wiley.

Acumen

- Capacity to perceive and understand the forces that will shape outcomes
- Asking the right questions; what are the priorities, how does this project serve them, what about competing interests?
- Using the right tools; SWOT – examine the intersections, i.e., how might an external threat amplify an internal weakness?

Allocation

- What should you not do?
- Focus limited resources on the activities to generate greatest strategic value
- Push back on requests that don't serve the strategic intent
- Choices framework:
  - Winning Aspiration
  - Where to Play
  - How to Win
  - Core Capabilities
  - Management Systems

Lafley, A.G., & Martin, R.L. (2013). Playing to Win: How Strategy Really Works. Harvard Business Review Press

Action

- Translate strategic choices into measurable plans
- Establish metrics to measure actual value and impact
- Requires ongoing adaptation
- Revisit assumptions, adjust approach, communicate clearly

* AGILE "Product Box", or Amazon's "Press Release" (PR)

3 A Recap

Element	Core Question	Key Tool	PM Application
Acumen	What is the landscape?	SWOT Analysis	Stakeholder mapping, environmental scanning
Allocation	Where do we focus?	Strategic Prioritization	Scope management, resource optimization
Action	How do we win?	OKRs / KPIs	Value-based metrics, adaptive planning

The Strategic Project Challenge

Instructions: In your group, apply the 3 A's in Action framework to the project scenario on your Scenario Card. You have 15 minutes for discussion, followed by 5 minutes to prepare a 3 minute summary of your group's single most important strategic recommendation.

A1 - Acumen: Understand the Landscape

Identify the most significant internal and external factors that will shape this project's success. Use the grid below to capture your analysis.

Internal Factors	External Factors
Strengths: What organizational capabilities, resources, or advantages can this project leverage?	**Opportunities:** What trends, shifts, or emerging conditions could create strategic advantages for this project?
Weaknesses: What internal constraints, gaps, or vulnerabilities could undermine this project's success?	**Threats:** What competitive, regulatory, or environmental forces could jeopardize this project?

A2 — Allocation: Make Deliberate Choices

Based on your Acumen analysis, identify the top three strategic priorities for this project. For each priority, explain why it is strategically important and what trade-off it implies (i.e., what you are choosing not to focus on as a result).

Priority	Why It Is Strategically Important	Trade-Off (What We Are Deprioritizing)
1.		
2.		
3.		

A3 — Action: Execute with Strategic Intent

For your top strategic priority, define a key initiative and a value-based success metric.

Strategic Priority	Key Initiative	Value-Based Success Metric
(From Allocation, Priority 1)	What specific action will you take?	How will you measure the *value* created, not just the output delivered?

Group's Single Most Important Strategic Recommendation: In one or two sentences, what is the most important strategic recommendation your group would make to the project sponsor?

Be specific about what you recommend and why it is the highest-priority strategic choice.

Debrief

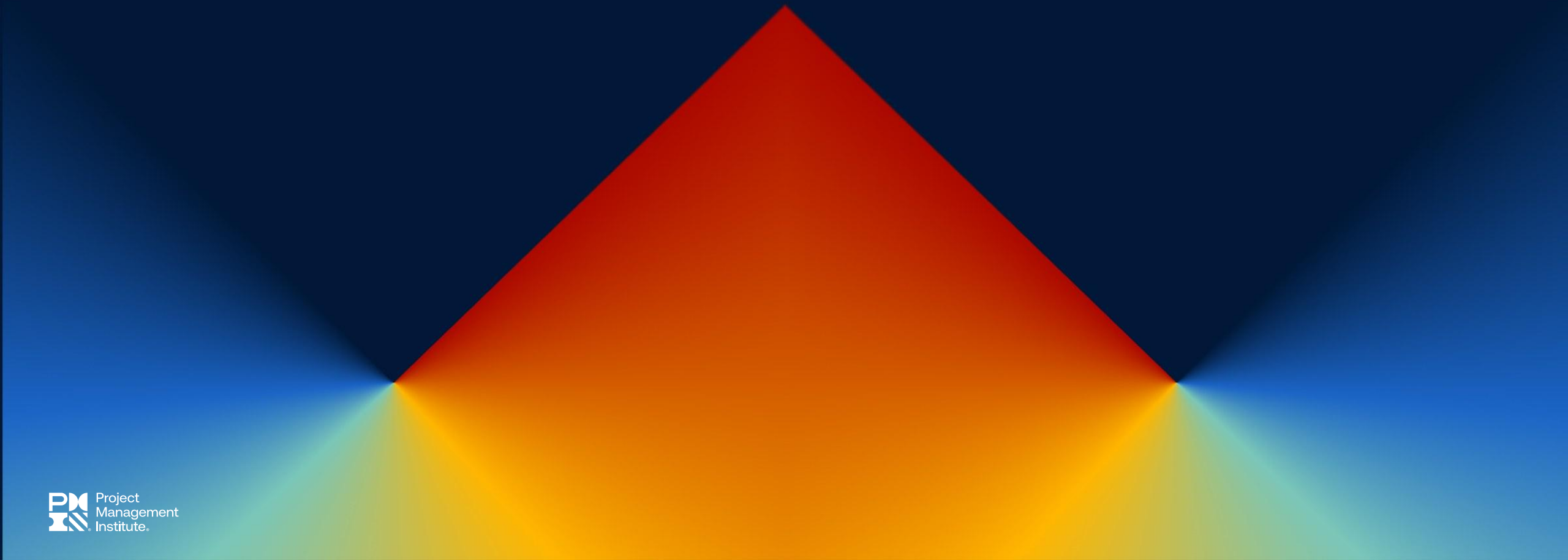
Takeaways:

- Strategic Thinking is a Team Sport
- The richness of the recommendations developed in 15 minutes is a direct result of the diverse perspectives
- Imagine the possibilities in applying this kind of thinking consistently, over time, with your actual teams…

Cultivating a Strategic Mindset

- Create a habit of deliberately cultivating strategic thinking
- Note that organizational environment often works against this…
  - Schedule thinking time (Block Time)
  - Ask ‘why’ before ‘how’ (WIIFM)
  - Expand your inputs (Risks and Opportunities)
  - Make strategic thinking a TEAM practice

Systems Leadership



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Systems Leadership Workshop

Strategic Thinking provides direction and focus. (*What to do to win or succeed)*

Systems Leadership enables adaptation and collaboration in complex environments. (*Why things happen the way they do)*

Leading through interdependencies: seeing patterns over events, surfacing assumptions, and influencing feedback loops.

Opening Activity: Fix It --- Then Ask Why

“Attendance at our monthly chapter meetings has dropped 30% over the last year.”

1 FIX IT
At your table: You have 60 seconds.
What would you do?

2 WHY
What assumptions did you make about WHY attendance is down?

Don’t solve the event before you understand what is below the surface.

Systems Leadership Purpose & Outcomes

Today's workshop builds practical systems leadership skills for volunteer environments where **outcomes depend on** networks, feedback loops, and shared ownership rather than formal authority.

By the end, you'll be able to:

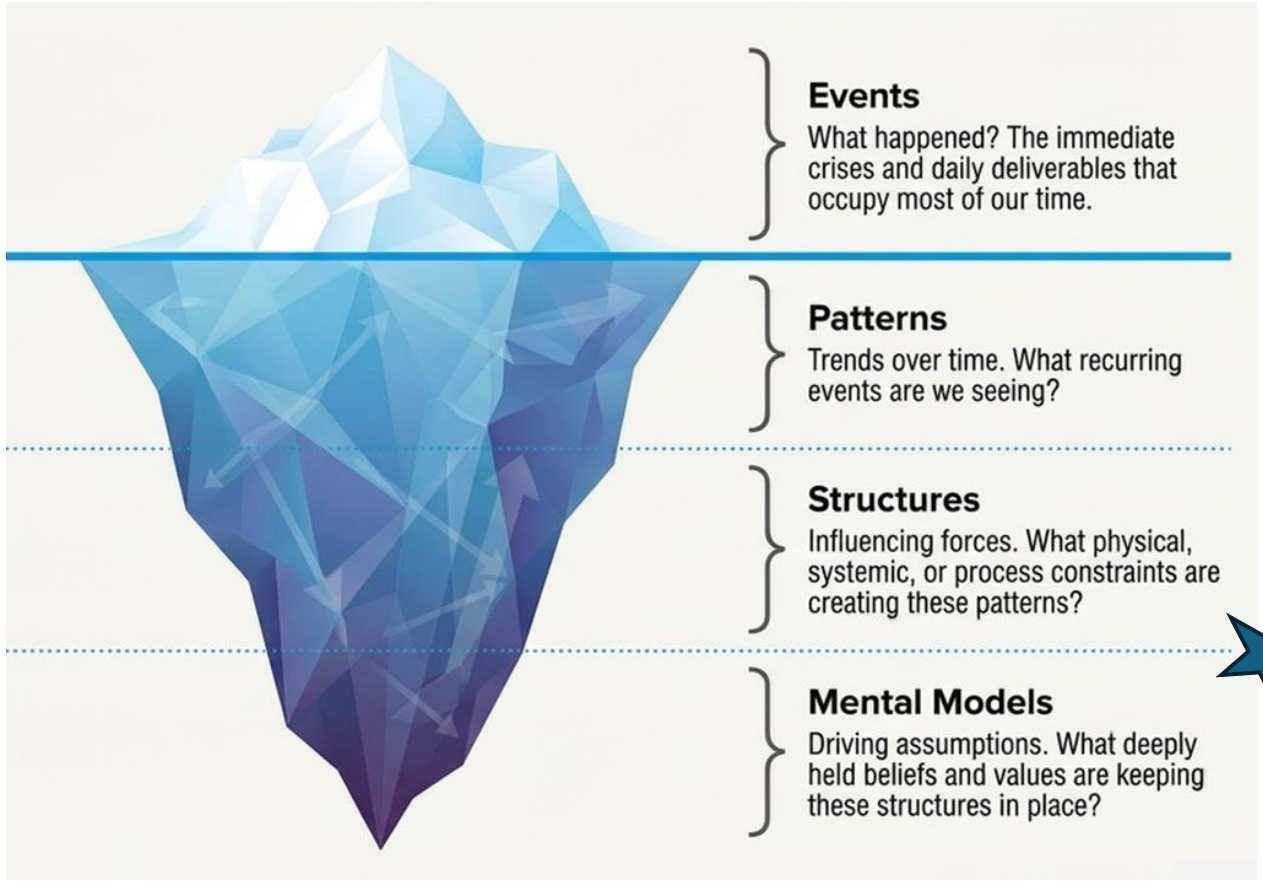
- Define the "system" you are trying to influence and the stakeholders who shape it
- Apply the Iceberg Model to diagnose the underlying structures and mental models driving challenges.
- Practice Stretch Collaboration techniques for engaging with complex stakeholder dynamics.

The 5 Disciplines

Discipline	Core Idea for Project Managers
Personal Mastery	Your own clarity of purpose is your most powerful leadership tool.
Mental Models	The assumptions you hold about your project are often the biggest risks.
Shared Vision	A project team aligned on the ‘why’ can navigate any ‘how.’
Team Learning	The team’s ability to think together is your greatest asset in complexity.
Systems Thinking	Seeing the whole, not just the parts, is the key to finding high-leverage solutions.

The Iceberg Model: Systems Thinking

Typical reaction to EVENTS,
Systems Leaders look below surface …
to find PATTERNS causing events.
Even deeper we find STRUCTURES
that create the patterns.
Finally, we visit deeply held beliefs
and assumptions, MENTAL MODEL,
that drive the entire system!



THIS is where systems leaders intervene to make real, lasting changes!

3 Approaches:

1. Systemic Approach (Acumen):

This is about acting from the whole, continuously searching for high-leverage ways to shift the entire system. It means understanding the historical legacies and contemporary realities that contribute to the current challenge, and looking for patterns and interdependencies.

Source: Systems leadership: Strategies for systemic change

3 Approaches:

2. **Collaborative Approach (Allocation):**

This involves what Reos Partners calls “Stretch Collaboration.” It is about engaging with diverse actors, even those with conflicting interests, to co-create a way forward. It embraces conflict and connection, experiments to find solutions, and crucially, requires recognizing your own role in the system.

3 Approaches:

3. **Creative Approach (Action):**

This is the process of bringing something new into the world. It moves through three phases: Diverge (open innovation, welcoming diverse points of view), Emerge (the “groan zone” where new solutions are integrated and refined), and Converge (focused, structured decision-making).

Stretch Collaboration

Relationship to Systems Thinking

Stretch Collaboration	Systems Thinking Principle
Embrace Conflict & Connection	Multiple perspectives reveal different parts of the system.
Experiment to Find a Way Forward	Complex systems respond through adaptation, not prediction.
Recognize Your Role in the System	Every participant both influences and is influenced by the system.

Stretch Collaboration provides a practical leadership model for navigating complexity when stakeholders disagree and no single person owns the solution.

Stretch Collaboration M.O.R.E.

Stretch Collaboration	M.O.R.E.
Embrace Conflict & Connection	**Manage Perceptions** — understand stakeholders before trying to persuade them.
Experiment Your Way Forward	**Relentlessly Reassess** — inspect, adapt, and iterate rather than assuming the first plan is correct.
Recognize Your Role in the System	**Own Success** and **Expand Perspective** — take responsibility for your influence while understanding the broader system of relationships, feedback loops, and unintended consequences.

Stretch #1 – Conflict and Connection

Embrace Conflict and Connection: Alternate between asserting your position and genuinely engaging with those who hold different perspectives. Seek to understand, not just to be understood.

Stretch #2 – Find a Way Forward

Experiment to Find a Way Forward: Let go of the idea that there is one perfect solution. Instead, co-create by trying different actions and learning from the results.

Stretch #3 – Recognize Your Role

Recognize Your Role in the System: Understand that you are part of the problem and therefore part of the solution. You can only control your own actions and influence others.

Core Systems Leadership Behaviors

- **Seeing:** Understanding the full volunteer system
- **Connecting:** Bridging committees, projects, and roles
- **Enabling:** Making it easier for others to contribute
- **Learning:** Running small experiments, not big mandates

Key Shift: From *doing more yourself* to *designing better systems*

Mapping the Process

Instructions:

(1) As a group, apply the Iceberg Model and the principles of systems leadership to analyze the challenge presented.

(2) You have 15 minutes for the group discussion and mapping, followed by 5 minutes to prepare a brief summary.

(3) Identify the high-leverage point—the one place where a small change could lead to a large, positive systemic improvement.

Debrief

In 3 minutes, please share your group's high-leverage point. What is the one intervention, at the deepest level of the system, that you believe would create the most significant positive change for your scenario?

Key Takeaways

- Strategy is focus
- Systems shape outcomes
- Sustainable value beats effort

Learning Organizations

"The most successful organizations are 'learning organizations'—systems that are capable of seeing themselves clearly and adapting continuously."

~ P. Senge, *The Fifth Discipline*

Organizations that continually learn are the ones that continually improve.

Resources

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Thank you!

Let’s continue the conversation!





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