“A tour d’force. *Strategists at Work* is a practical, step-by-step guide to creating strategies and then shifting them when they hit real-life. A blend of practical insights and deep wisdom from the best of traditional and contemporary thinking about strategy, MacIntosh and MacLean provide a compelling view of how smart strategy happens.”

**Kathleen M. Eisenhardt**, *Stanford University*

“Robert MacIntosh and Donald MacLean have written an absolutely marvelous book. It should be read by students and seasoned practitioners alike. Their intent to put strategy and strategists together by focusing on the actual human beings who do strategy is nothing short of strategic brilliance.”

**Ian I. Mitroff**, *Professor Emeritus, University of Southern California, USA*

“This book offers useful respite from the conventional and rather stale strategy textbook structure. Offering fresh, applied and relevant thinking on a number of areas, accompanied by engaging examples, it will be a valuable addition to the reading lists of MBA students, executive education participants, management consultants and practicing strategists.”

**Loizos Heracleous**, *Warwick Business School, University of Warwick, UK*

“This is an illuminating study of the crucial importance of strategic thinking in organisational management. It provides a historical perspective on the origins of strategy and a comprehensive account of theoretical frameworks. And with critical consideration of a variety of real-world case studies it is also an eminently practical resource for strategists and managers concerned to optimise organisational effectiveness.”

**Irene McAra-McWilliam**, *The Glasgow School of Art, UK*

“MacLean and MacIntosh eloquently engage us in a clear view of the contemporary world of strategy through excellent practical stories both from business and public sector coupled with a concise view of key theories. In addition, they offer a significant new take on the practice of strategy, in revealing critical characteristics for strategist of the 21st century; a refreshingly simple and cutting edge approach to a new form of strategic action as creative, Bardic – as an art form.”

**Joe Lockwood**, *Institute of Design Innovation, UK*

“In this marvellous book, Robert MacIntosh and Donald MacLean let us glimpse the complex relationship between plans and actions over time and show how sophisticated strategists coherently orchestrate collective action. They insightfully combine evidence-based strategy insights with pragmatic concerns. You will find here state-of-the-art research, a practical orientation, rich case studies, and an enjoyable narrative!”

**Haridimos Tsoukas**, *University of Cyprus and University of Warwick, UK*
“MacIntosh and MacLean debunk the myth that strategic planning is a black art. Using a combination of historical context and modern case study, together with current theory and extensive action research, this text gives a straightforward and ordered account of the planning process to guide any business owner, executive or manager towards a realistic and workable plan.”

**Nigel Scott, Institute of Directors, Scotland, UK**

“This is by far the most easy to read, simple to follow strategy textbook I’ve encountered. MacIntosh and MacLean capture the essence of the dynamics of strategy planning by first breaking down the mystique of strategy planning and then laying out a simple step-by-step approach to formulating a plan that allows for pivoting and incremental changes, both of which are necessary for surviving in dynamic environments. Especially intriguing and refreshing is the focus on key leadership in the shaping of strategic management decision as opposed to the heavy emphasis of economic and financial undertones from a majority of other strategy textbooks. I particularly liked the use of the “running case” for illustrative purposes. This approach gives the reader a deeper more practical understanding of the theories and analytical tools that are presented in the chapters, such as in the chapter 6 and demonstration of the use of PEST Analysis. I would definitely recommend this book to students and professionals looking for a very practical, down to earth approach to strategic management and strategy formulation.”

**Tiffany R. Bussey, Morehouse College, USA**

“If you want to really know the value of strategy and how to develop it, this is a must read.”

**David Wilkinson, Inspired Leaders Network**
For my beautiful wife Anne and our children Euan, Eilidh and Eva. Thank you for the laughter and happiness your company brings and for your support, without which this book would never have been completed.

Robert

I would like to dedicate the book to everyone out there who’s just trying to cut through the gobbledygook and make organizational life, paid and voluntary, a more positive and productive experience for themselves and others – keep going please!

Donald
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This book would not have been possible without the efforts of many friends and colleagues. We owe a debt of gratitude to the members of classes, courses and management teams over the last two decades for helping us road-test The Strategy Cycle model which is presented in these pages. We have named several individuals in the book to acknowledge specific contributions and ideas but we are particularly grateful to Kate Buell-Armstrong, Harry Burns and Sandy Rowan for the privileged access they have offered us into their lives as strategists. We are also indebted to Martin Drewe (then of Palgrave) for his forbearance during what has been a slow writing process beset by new jobs and general busyness on our part. Rachel Bridge-water took over the project in its latter stages and we are grateful for her thoroughness in the process of submitting and preparing the final manuscript. Thanks to Neil Wallace from the design agency O Street for his help with creating some of the images in the book and to Val Turner for transcription of various interviews with strategists. The case studies were produced by Angeliki Papachroni and the detail and rigour with which she produced them was invaluable. Palgrave were kind enough to source reviews of an early draft which were extremely helpful in shaping the final manuscript and we would like to thank David Mackay and Simon Haslam in particular for their feedback. Finally, thanks are due to John Sanders of Heriot-Watt University for helping pilot some of the materials and proof reading early drafts. Whilst we have had an abundance of support in preparing this manuscript, we would like to acknowledge that any remaining errors are our own.
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Robert MacIntosh is Professor of Strategic Management and Head of the School of Management and Languages at Heriot-Watt University. He holds a PhD in engineering and has worked at the Universities of Glasgow and Strathclyde. His research interests centre on strategy and organizational change and he has been published over 100 articles, book chapters and conference papers in these areas. He has consulted extensively with public and private sector organizations and currently sits on the board of the charity Turning Point Scotland. His status as a life-long fan of Aberdeen Football Club is a case study in unending optimism. He lives near Glasgow with his wife Anne and their children, Euan, Eilidh and Eva.

Donald MacLean received a BSc in Physics from the University of Strathclyde, a PhD in optoelectronics from the University of Cambridge and an MBA from Kingston University. He spent ten years working in the optoelectronics industry before joining the University of Glasgow in 1993 where he is now a part-time professorial research fellow. He has published extensively on strategy, transformation, complexity theory, action theory and research process in a range of journals including the Strategic Management Journal, The Journal of Management Studies, Organization Studies and Human Relations. He combines his part-time academic work with on-going commercial, public and third-sector consultancy engagements and directorships and lives with his family and an ensemble of assorted animals in Connel by Oban in Argyll.
SECTION A

1 Introduction
2 A Brief History of Strategy and Strategists
3 The Running Cases
Scholars have debated the relationship between strategic planning and strategy as an emergent, artful and creative response to a world that can only ever be partly anticipated, known and understood. Our bold claim in this book is that we cast the relationship between strategic planning and emergent strategy into new light, and, importantly, we do so in a way that is both simple and helpful to practitioners.

The best laid schemes o’ mice an’ men
Gang aft agley

(Robert Burns)

The primary focus of this book is the study of strategists at work. Our purpose is to share with you what we have learnt through two decades of strategy work with a myriad of organizations of all shapes and sizes. In “you” we imagine someone who is keen to develop their business or organization – small or large, public or private; someone who senses that strategy is an important topic, a possible key to success, or at least something that you should know about. Whilst we take a little time to locate the subject of strategy in its historical contexts, and to give guidance to those seeking qualifications in strategy, our intention is to address those who are keen to get on with it. The book is therefore focussed on what matters in practice.

So what is strategy? Many things to many people it would seem since there are various definitions of strategy. As we progress, it will become clear that our definition of strategy relates to the coherence of the alignment of broad intentions, environmental circumstances and available resources but that the process of assessing alignment should be done in relation to a perceived challenge, opportunity or difficulty. Planning plays a key part in strategy. As Robert Burns reminds us, even the best laid and most carefully conceived of plans often bite the dust. And yet still we plan. Indeed, in our own experience we have witnessed countless abandoned plans but we nevertheless feel that planning plays a crucial and possibly decisive role.

Strategy is the craft of collectively rising to a significant challenge and accomplishing more than might be reasonably expected as a result of self-knowledge, resolve, foresight, creativity and genuine capabilities cultivated over the medium to long term.

Scholars have debated the relationship between strategic planning and strategy as an emergent, artful and creative response to a world that can only ever be partly anticipated, known and understood. Our bold claim in this book is that we cast the relationship between strategic planning and emergent strategy into new light, and, importantly, we do so in a way that is both simple and helpful to practitioners.
Of course, strategy is not new. It has been studied in military and political contexts for centuries and in organizational contexts for decades. What’s more, strategy matters. It has helped groups and individuals across the ages to build empires. In antiquity those empires were political and geographic in their nature. In today’s modern and organizational context, our view of empires has shifted to include corporations whose expanse is gauged in terms like market share or profit levels. Yet, as the opening quote from Robert Burns tells us, plans, schemes and strategies often go wrong. Despite, or perhaps because of this, strategy itself has become something of an empire – a multibillion dollar industry. Academics may debate nuanced points relating to its nature and value, but its status as a significant social practice is largely taken for granted. One key observation remains true however, across political or organizational, modern or ancient settings. Empires eventually fall. George Orwell argued that “whoever is winning at the moment will always seem to be invincible” (1946), yet history tells us that no empire lasts in perpetuity. At some point, a new strategist arrives on the scene and a new order is established. In our view this applies to the field of strategy itself. We aim in this book to combine ideas from challenging new theories with real insights from strategists about what they actually do. The resulting combination is a simple but powerful way of practising strategy.

In the early years of computing it was difficult to imagine anyone threatening the dominance of computer manufacturers such as International Business Machines (IBM). Yet Microsoft led a shift from hardware and circuitry to software and operating systems. In so doing, Microsoft became dominant to the point where it controlled over 90% of the market share for operating systems. Manufacturers were left making commodity products at low margins. Whilst Microsoft is still a major player, it is clear that the ground is shifting again with firms such as Google and Apple pursuing new strategies, which are in danger of marginalizing Microsoft just as they marginalized IBM and other computer manufacturers. The inescapable fact is that strategies and strategic management practices themselves have a shelf-life. The ability to create, dismantle and recreate strategic order is the domain of the strategist. As individuals, strategists lead their organizations, sometimes directly, sometimes indirectly and as we move into progressively more global, more networked and more challenging times it appears that the role of the strategist is changing.

Our starting point therefore, is a simple one. Whilst strategy matters, strategists matter more. Some firms get lucky and happen upon a strategy, which allows them to compete effectively, or perhaps even dominate for a period. Yet even in these happy circumstances, the so-called Icarus paradox looms as an explanation of the eventual downfall of a firm. Miller argues that success can lead to overconfidence and complacency. In Greek mythology, Icarus managed to fly using wings created from wax and feathers. However, he flew too close to the sun with catastrophic consequences when the heat melted the wax and his wings disintegrated.

In this context, the Icarus paradox is a phrase coined by Canadian academic Danny Miller to explain how exceptional success can lead to the eventual downfall of a firm. Miller argues that success can lead to overconfidence and complacency. In Greek mythology, Icarus managed to fly using wings created from wax and feathers. However, he flew too close to the sun with catastrophic consequences when the heat melted the wax and his wings disintegrated.
failure of seemingly dominant players (Miller, 1991). As circumstances change, a once winning strategy can become a weakness not a strength. Where IBM’s capabilities in design and manufacturing were the roots of its success, they eventually became a source of difficulty rather than advantage once their competitive environment had irreversibly shifted towards commodity, computers and sophisticated software. Similar tales can be found in the retail sector where the rise of internet commerce has transformed the best high street locations into an expensive luxury which was often locked in place through long-term lease agreements.

Whilst this book offers advice on how to develop strategy, our focus is on looking at “how to do strategy” from the perspective of the strategist. Our reasoning is simple – it is strategist who do strategy, and the conceptual distinction between plans and emergence are reconciled in the actions of strategists. We do not hold a restrictive definition of the strategist as either the person at the top of the organization, or the individual with the official title of chief strategist. Anyone can do strategy – who does what is really a question of power on the one hand, and efforts on the part of some to balance control and creativity on the other. A good strategist, or a group of strategists, is capable of (re)developing strategy, yet a glance through the contents of many books on strategic management suggests that the habits and practices of good strategists represent something of a blind-spot. The curricula of many business school topics either overlook the relationship between strategists and strategy or compartmentalize them by offering separate courses on strategy and leadership. Perhaps the assumption is that armed with the right models and tools anyone can be a better strategist. Whilst the tools of strategy analysis play a role, our contention is that a focus on tools alone is necessary but not sufficient. A sculptor can produce intricate three-dimensional surfaces using only a hammer and chisel. The tools may be indispensable but the craft and inspiration come from the sculptor. We will, of course, present a range of strategy tools and most of them will be quite familiar. We think you will see the distinctiveness of our cumulative process for building a simple, succinct but coherent and comprehensive statement of strategy. It is an approach we have developed through hundreds of strategy workshops, it is based around the use of templates that capture disciplined logic and it works. However, this is not just another book about strategy tools. In our view the logic is important, necessary even. But good logic is certainly not sufficient in and of itself. Our primary purpose in this book is to bring the strategist centre stage. And we seek to bring them back as rounded human beings rather than intellectual machines. Our focus is on strategies as the products, processes and performances of strategists.

By the end of the book you will see how we present strategists as people who, on the one hand, employ disciplined analysis to formulate coherent plans – which they are ever ready to modify, radically alter or abandon; and, on the other, readily see, grasp and help to create the significance of new and emerging realities in which they involve others through a wide variety of means more traditionally associated with art and performance.

We will consider not just the analysis of markets and competitors but look to the nuances and the often decisive distinctions created by those doing the analysis. Our
desire to write this book arises from our own experience of doing strategy and working with others on strategic development for two decades. Over the years we have detected subtle but significant shifts in the imagined practice of strategy. At one time it was more or less assumed that the primary task was an intellectual one of developing the “best” strategy and making top-level decisions that others would implement more or less mechanically. Over time, growing recognition of the importance of the “how” of strategy saw more sophisticated processes of participation and involvement occur. This was partly in line with the realization that competitive advantage often stems from voluntary actions that go beyond the mechanistic following of orders. Strategy thus became a more distributed activity with a less top-down flavour and more awareness of cultural issues. Today, we perceive a new shift towards a strategy process that combines and transcends the previous two phases. In a way, the importance of top-down influence is re-emerging, not in the form of intellectual decision-making but as a much richer social, emotional and intellectual dynamic which promotes cohesion and action – in short leadership whether in the form of a charismatic individual, a team or a more distributed process. At the same time, we are seeing a much more creative form of emergent, localized action that somehow coheres into often unexpected new patterns and success-stories. Such an approach makes strategy genuinely participative and creative. This new form of strategy is calling forth a different type of strategist. A new type of leadership.

Conceptual distinctions such as formulation and implementation or deliberate and emergent have acted as stumbling blocks for academics researching strategy and a source of (sometimes amused) puzzlement for many practitioners. As a result, senior scholars have repeatedly called for a more dynamic or holistic view of strategy. Perhaps the most influential strategy scholar of recent decades is Michael Porter. Based at Harvard Business School, Porter has created a whole new vocabulary for strategy and we shall examine some of his work in Section B of this book. He argues that the central question facing strategy researchers is why some firms fail whilst others flourish. He concluded in 1991 that we were some way short of a compelling explanation (see Porter, 1991).

In the decades since Porter made this observation, the nature of organizational and commercial life has changed beyond recognition. The impact of globalization, combined with dramatic changes in communication technologies, has been stark. A cursory examination of your own organization, and how it did business 20 years ago, is likely to produce the sensation that you are watching grainy, black and white footage of some far distant past. New products, processes, business models and industries have appeared. These, in turn, are fostering new attitudes and expectations amongst many stakeholder groups – from customers through to employees and suppliers. Rather worryingly, a recent examination of the contents of strategy classes in a range of international business schools1 concluded that, despite these dramatic changes in the wider economy, we still default to materials and tools which have changed little since the middle 1980s. Our contention is not as simple as suggesting that the material is out of date. Rather, we argue that, since the context in which it is
being deployed has changed so radically since much of it was first aired, we need a new take on strategy. In addition, strategy is making inroads into new spaces that are arguably even more complex and challenging than the issues to which it has hitherto addressed itself – pressing international difficulties such as climate-change, poverty, financial restructuring and energy shortages all calling forth collaborative, and inter-organizational, strategy making on an unprecedented scale. So, in short, we need to innovate in our strategic thinking. This book is offered in that spirit.

In broad terms, we see strategy as a somewhat bizarre process of creating a plan which seems to galvanize collective action and then, often quietly, sees a seemingly unrelated reality take shape. Figure 1.1 below depicts the strategy cycle. At this stage, it may use language which is unfamiliar. As the book progresses we will revisit the components of the strategy cycle but for the time being we would draw your attention to the central row which suggests that we painstakingly develop a plan which then encounters the lived reality of our present circumstances and at this critical transition from planning to delivering, something highly creative occurs.

The strategy cycle is an approach to strategic management which combines strategic logic (in the form of detailed plans) with the aesthetic, creative and interpretive process of bringing a strategy to life.

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**Figure 1.1** The strategy cycle: a model of strategic management
Over the course of the book we aim to provide insights on both the tools and the discipline underpinning these two key processes – planning and emergence. We revisit many familiar planning tools to strip them down to what really counts; and we introduce some new ideas in a slightly more academic tone towards the end of the book to explain how emergence and planning rather than being alternatives are simply different sides of the same coin. In so doing we draw attention to some forgotten or overlooked practices that might help us see how emergence can be “stewarded” or managed in a new way.

Much of what you will encounter in Section B will be familiar. In Section C we adopt a different, more research-informed tone, to show how the collection of simple analytical tools presented in Section B, form the backdrop to a story about the strategy, told by strategists in an attempt to cajole, convince and inspire colleagues to implement new courses of action. This view of strategists as storytellers connects to ancient bardic traditions where the past and present of organizations, institutions or tribes were woven together in ways which colour future possibilities.

**Strategy styles**

How we as strategists approach the task of developing strategy varies in much the same way that individual handwriting, personality or other traits vary from one person to the next. Our research has identified three distinct strategy styles. Intent-driven strategists place greater emphasis on those parts of strategy which relate to objectives, goals and intentions. They use ambitious targets or noble aspirations to generate inspiration and a sense of shared purpose amongst members of the organization. In 1961, John F. Kennedy set the ambitious target of sending a man to the moon. He had little or no knowledge of whether this was achievable and significant challenges lay ahead but his public call to action played an important role in developing the National Aeronautics and Space Administration’s (NASA’s) strategy. In our terminology he would be an intent-driven strategist.

**Strategy styles**: The Stride App will allow you to get an indication of your own strategy style at no cost or you can complete a full diagnosis of your strategy style using our profiler. Both are available at www.stridesite.com.
A second strategy style is focused on developments, opportunities and threats in a firm’s environment. **Trend-driven strategists** scan the horizon looking for advance notice of future tastes, trends and technologies. Using the market intelligence that they gather, they are able to position their organizations to capitalize on opportunities before others have time to react. Steve Jobs moved Apple into the music industry with the release of iTunes and the iPod. Now it seems an obvious fit but at that point in time, Jobs was looking at developments in a number of key areas. Hard disks were becoming smaller, cheaper and had higher capacity. Digital music had been widely available in the form of CDs but technology developments meant there was a real possibility of convergence occurring between consumer electronics firms, especially those making stereos, and computing firms. Apple made a decisive move, opened significant new revenue streams and introduced a whole new group of customers to their products and services. We would describe Jobs as a trend-driven strategist. It is, of course, worth noting that early signals are often hard to read. Throughout the book we will examine salutary tales of strategists who have guessed wrong, leading their organizations to over-invest or come to market too early.

The third strategy style relates to those who pay attention to the internal skills, resources and capabilities of their organization. **Resource-driven strategists** look for opportunities to deploy existing skills and know-how. Honda is often quoted as an example of a firm with a clear capability in engine technology. Whether the eventual product is a lawnmower, an outboard motor, a car or motorbike, there are key aspects of Honda’s skill set which are being deployed and developed. Lessons learnt from one context are fed back into other contexts and strategy is in some ways the continuing search for opportunities to exploit core skills. It is no accident that Honda runs an advertising campaign that claims “everything we do goes into everything we do”.

Our argument is that there is no definitive or correct way to build strategy. Rather, we suggest that individual strategists have default preferences and frame strategy work to foreground some issues whilst overlooking others. This book offers an overview of the main areas of strategy work and encourages you to recognize the strengths and limitations of your own biases in relation to strategy.

**How the book works**

In the remainder of Section A we offer a brief historical review of strategy research. This will allow you to place particular schools of thought in their rightful place and to see the roots of some recurring tensions in the strategy literature. We then introduce three strategists and their organizations. Professor Sir Harry Burns was Scotland’s most senior medical doctor from 2005 to 2014 and someone with significant influence over the strategy of the National Health Service in Scotland. Kate Buell-Armstrong was the founding Chief Executive of Confused.com which grew out of the Admiral Insurance Group Ltd., a Financial Times Stock Exchange (FTSE)-100 listed business with a presence in the UK, Canada, the USA, Europe and India.
Sandy Rowan is the Chief Executive Officer of Pointer Security Ltd., a family owned business which was founded in Glasgow and now has operations in the Middle-East and Thailand. These three strategists operate in vastly different contexts covering the public sector, the corporate world and the small to medium sized enterprise sector. Throughout the remainder of the book, each strategist offers a commentary on the practicalities of strategy work in their own contexts.

Section B of the book provides the tools and techniques of strategy based on a simple sequence of analysis and decisions that we have developed through many years of running strategy workshops with several hundred firms. The emphasis is on what works, with supplementary material linking to the underpinning research and theory where appropriate. Many of the analytical tools that we present would be found in most other strategy texts. Distinctive to our presentation of these tools is a particular and cumulative structure which extracts maximum benefit and clarity from the analysis done. The analytical process culminates in crafting a simple, succinct statement of strategy covering 12 components. It is worth remembering that individual strategists tend to use these tools differently dependent upon their strategy style. Finally in Section B, we consider the conversion of these core ideas about strategy into strategy documents. Communicating strategy is challenging and strategy documents vary enormously in style, content and level of detail. In our experience, some are a triumph of presentation over substance. We present advice on moving from a simple, concise and robust strategy statement to a more elaborate and detailed account intended for other audiences.

Section C shifts tone and offers an attempt to place the practical approach we set out in Section B into a wider academic context. We therefore begin to elaborate on the challenges of both conceptualizing strategy and how different bodies of theory such as complexity theory may help reframe our understanding of both strategy and strategists. In so doing, we place our own views on strategy process and the role of the strategist into the wider context of the historical review set out in Chapter 2.

Section D contains four detailed case studies (Apple, Nokia, ABB and Nine Dragons) that afford an opportunity to apply the contents of the book to a range of different contexts. The four cases take a particular focus on the roles of key strategists in the story and will allow you to apply the ideas from the book to a variety of sectors, geographies and situations. Contrasting your own organizational setting with those of others is often instructive and we include shorter micro-examples within individual chapters, longer cases in Section D and running cases from our three strategists in public, corporate and family business settings. This combination of examples provides ample opportunity to see strategy in action.

Finally, the book contains three appendices. Appendix 1 collects the various analytical templates used in Section B into one place for convenience. When we are working with strategists we often use these individual templates as a form of workbook. Appendix 2 recognizes that strategists are often asked to produce a business plan based around their strategy and shows how to use the contents of this book
to produce such a document. Appendix 3 recognizes that many of you reading this book will be studying towards a formal qualification and may need to write an essay or assignment on strategy. We have many years of experience of both teaching strategy and assessing coursework. Appendix 3 therefore contains some insights on how to approach a strategy assignment, case study, essay or exam.

The structure of the book is intended to allow you to read the text in a variety of ways. We hope that the book makes sense as a traditional sequence read from start to finish. Yet we also acknowledge that you may want to skip some parts or read in your own sequence. If for example, you want to understand how our view of strategy differs from existing bodies of work, then the history of strategy presented in Chapter 2 is helpful. If you want simply to focus on writing your own organization’s strategy you can skip straight to Chapter 10.

We hope that you enjoy the book and we are confident that time spent thinking about strategists at work will help you to become a better strategist.