



Strategy Triage for Learning Businesses

Leading Learning Podcast Transcript for Episode 447

Celisa Steele: [00:00:02] If you want to grow the reach, revenue, and impact of your learning business, you're in the right place. I'm Celisa Steele.

Jeff Cobb: [00:00:10] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:17] Strategy is not a one-and-done activity. Given all the effort that usually goes into identifying a good strategy, articulating the strategy, breaking the strategy down into the actions and tasks that will bring it to life, it can be tempting to set it and forget it.

Jeff Cobb: [00:00:33] Though it's tempting, we're sure you know that's not how good strategy survives. Good strategy is more organic and responsive. It necessarily is influenced by a whole range of factors, from what's going on inside your learning business to what's going on outside your organization and impacting your learners.

Celisa Steele: [00:00:53] Back in mid-December, we aired episode 440, and we called that "No Time Like Now for Strategy." We were thinking about time from the standpoint of predictable, recurring whens that might be natural times for you to revisit and confirm or adjust your strategy—things like the end of the calendar year, the start of a new budget year, the launch of the annual learner survey, the start of planning for the annual convention, and so on.

Jeff Cobb: [00:01:26] But then there are less predictable whens that can also be good and important times to revisit and reassess strategy: a sudden resignation of someone on your team, for example, or a large corporate buyer or academic partner not renewing a course licensing agreement, a new and well-funded competitor entering your market.

Celisa Steele: [00:01:47] There can be unpredictable whens like the ones that you were just mentioning, Jeff, but there can also be ones that aren't necessarily specific to your organization and its market. These can be broader, more far-reaching whens: pandemics like COVID-19, a

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watershed moment in technology like ChatGPT in late 2022, or policy changes and executive orders like those coming out in the U.S. in the early weeks of President Trump's second term.

Jeff Cobb: [00:02:20] It's certainly easier to plan for revisiting strategy at predictable points, but it's at least as important to revisit and reassess strategy on an ad-hoc basis.

Celisa Steele: [00:02:31] We want to offer a tool for strategy triage when you find your learning business needs to pause and reassess. This tool comes from Marian Urquilla, a strategy consultant, coach, and co-founder of the Center for Community Investment, and she originally developed her Strategy Triage Tool during the COVID-19 pandemic, but she recently revised it to be applicable more broadly, including in the wake of the 2024 elections in the U.S.

Jeff Cobb: [00:03:02] We like this tool because it jibes with how we tend to talk about strategy, how we have talked about strategy in the past, but it's nice to bring that different perspective into the conversation as we'll do today. What we'll do is break this down into a why, what, and who look at using this tool.

Celisa Steele: [00:03:21] We'll start with why. Depending on what your learning business offers, depending on who it serves, recent policy changes may be raising truly existential questions for you. Is a business built on DEI-focused courses built for institutional clients who receive federal funding viable?

Jeff Cobb: [00:03:42] You may have a very clear why to engage in strategy triage, to use this tool—it may be screaming at you. But most organizations are going to feel significant ripple effects of the political and economic changes going on right now. They may have to look a little harder. It may not be staring them quite as much in the face, but they're going to be there. And, of course, AI is marching on. It's going to continue to create disruption. In other words, there is plenty of reason for pretty much any organization to consider right now as a time of significant disruption.

Celisa Steele: [00:04:19] One of the key points around this why is that there will be times when something happens that will require you to adjust your strategy. If we look again at the COVID-19 pandemic, that impacted pretty much all learning businesses. Actually, if you think about it, pretty much all businesses, period, were affected for a period of time.

Jeff Cobb: [00:04:40] Yes, plenty of why out there for taking a look at strategy, for engaging in something like a triage effort. Right now, to me, just feels palpable as one of those why

moments. A lot of listeners are probably familiar with the acronym VUCA, which stands for volatility, uncertainty, complexity, and ambiguity. That certainly feels very high right now in general, and we need strategy to guide our work and to provide that important framework for making decisions, which means revisiting strategy.

Celisa Steele: [00:05:18] That's right because, even when you have a high VUCA situation—you've got all that volatility, uncertainty, complexity, and ambiguity—strategy is still important. But it can sometimes be hard to wade through that volatility and uncertainty to revisit strategy and to do that clearly. That's why we wanted to share this tool, this Strategy Triage Tool, because it doesn't dismiss VUCA. In fact, it understands that strategy has to coexist with volatility, uncertainty, complexity, and ambiguity—part of what helps you shift and adjust and tweak your strategy are those volatile situations, those uncertain times, those complex times, all that ambiguity.

Jeff Cobb: [00:06:02] Yes, definitely. You don't want to blindly stick with whatever strategy you had in place while all this is going around. You need this approach, to be able to adjust. This tool is a way to allow you to balance the need to look at the current situation—whatever it is that's causing you to reassess, whatever your form of VUCA is—with the need to continue to operate and do your work. How do you get that balance between, yes, it is chaotic out there, there is VUCA out there, and we've got to still somehow be able to make our way through it?

Celisa Steele: [00:06:35] That's the why. Now let's turn to the what. The Strategy Triage Tool that we want to share with you is essentially a set of questions—a discussion guide—that's going to help generate a shared understanding of the situation and then translate that understanding into decisions. It's as simple as that, and it's as hard as that.

Jeff Cobb: [00:07:00] Yes, because this is not easy stuff. This work is very much about starting with an understanding of your situation—an understanding that is deep and objective. That kind of deep, objective understanding is how we've always advocated going about strategy. When we've talked about it on the podcast, when we've engaged with it in our work as Tagoras, when we're doing consulting with clients, that is the starting point—to deeply and objectively understand what is going on here.

Celisa Steele: [00:07:32] The more disruptive the situation, the more volatile the situation, the higher that VUCA knob is cranked up, the more you have to be careful not to just be reactionary. You need to keep asking, "Is this really so? Can we be sure that how we're describing the situation is accurate and is likely to hold?" Understanding your situation, you do

have to engage on that and not just give yourself a pass on it, do a fair to middling job on it. You need to probe on that and make sure you really do understand the situation.

Jeff Cobb: [00:08:05] Yes, because it's easy right now that that VUCA knob is probably cranked up to 11—a little *Spinal Tap* reference there—and it's easy to start screaming, "The sky is falling!" and assume that everything is going to hell in a handbasket. But you do have to back up and say, "Okay, is this really as bad as it looks? What's really going on here? Let's try to get a 360 view of the situation and determine what is real, what's not real. What do we have to wait and see? What's going to happen before we start making decisions and start doing some of the triage work that we're talking about here?" You don't want to slap a cast on something that doesn't require a cast—stick with a medical-type analogy. I think I associate triage with *M*A*S*H*, the old sitcom-type show.

Celisa Steele: [00:08:53] Definitely comes from the medical world for sure.

Jeff Cobb: [00:08:55] In a way, I think all strategy is triage if it's being done well because you're always in constant play. Sometimes you've got that VUCA knob turned up to 11, and—to go back to my *M*A*S*H* analogy—you're in the war zone, and you got incoming and that sort of thing. Sometimes it's like that. But all the time your situation is changing. It's very rare that you're just sitting on smooth waters, and everything is remaining the same around you. You always have to be checking and adjusting and making sure that you've got the diagnosis right. The diagnosis is changing. You've got to treat it a little bit differently. Really, if your strategy is living and organic, that's always going to be happening.

Celisa Steele: [00:09:38] It's interesting you mentioned diagnosis. One of our other favorite texts on strategy is Richard Rumelt's, and he talks about diagnosing the situation. There is a lot of medical terminology at play in the world of strategy. What we're going to do now is give you some of the highlights and talk about certain aspects of the Strategy Triage Tool, but we will point you to the tool itself in the show notes at leadinglearning.com/episode447. Again, this is Marian Urquilla's tool, and we're highlighting it because it feels useful, and it aligns with how we think about strategy when we work with learning businesses to help them set their strategy.

Jeff Cobb: [00:10:20] Core to this strategy approach, to this triage approach, is the guiding question.

Celisa Steele: [00:10:28] The idea is that you want to balance responsiveness to the current moment—whatever that situation is that has arisen—with your long-term purpose. You don't

want to ignore or totally let go of that long-term purpose, but you need to be responsive to the moment *and* grounded in that long-term purpose. This guiding question should be open-ended and future-focused. It's about how do you move forward? And you want to be careful as you're developing this guiding question to not necessarily get into decisions or assumptions about who's responsible for what or what the solution is going to look like. This is about a guiding question. It doesn't have a lot of the answers baked in. It's going to be this touchstone that you're able to return to as a point to help you clarify or rein in some of the conversations that might be happening as you begin to explore what you might need to change or perhaps leave the same with your strategy.

Jeff Cobb: [00:11:24] An example of what this type of question might look like would be, "How do we navigate this moment while remaining steady in our commitment to the learners we serve and the future we're working toward?"

Celisa Steele: [00:11:37] It's obviously still fairly generic. You might want to be a little bit more specific in yours about what the current moment is or about what that future you're working toward looks like. But the idea is you're balancing, again, the current moment with this commitment towards your longer-term purpose, that future that you're working toward. This guiding question is deceptively simple, but it's not necessarily easy to land on that guiding question. You're going to need to spend some time generating that guiding question because you do want it to serve effectively as that touchstone that you're going to return to. There are some questions, some prompts that you can use to help you generate your guiding question. One of them is, simply, "What is your long-term commitment?" This is essentially your mission. And that could be that you're all about improving a field, a profession, or an industry. Or it could be that you're all about providing valuable skills, knowledge, and credentials to individuals to help them find and succeed in their career. Whatever your long-term commitment is, you need to articulate that and have that reflected in your guiding question.

Jeff Cobb: [00:12:43] Another prompt would be "Who are/what are you accountable to?" This can vary a little bit, or the emphasis can change a little bit as your situation changes. It could be things like a board if your learning business is part of an association, for example, or the bottom line if you're organized as a for-profit. It could be the staff you employ. It could be the learners you serve, the employers of those learners or the people who are served or treated by your learners—sticking with the medical analogy—if it's patients in the case of doctors or nurses. All of those could be the who and what that you're accountable for. But, again, the emphasis might change. Depending on what your situation actually is, and being clear about that who or what and what needs to be emphasized at this moment in time is an important part of this process.

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Celisa Steele: [00:13:33] And then the third and final prompt to help you as you're shaping your guiding question is "Given your long-term commitment and your accountability"—basically those first two questions—"how might you be called to respond in this moment?" If we take, as an example, the COVID-19 pandemic, the way to respond in the moment might have been the need to replace in-person learning that you did if that was a significant part of your business model, and now you could no longer hold those in-person learning events. Part of what you were called to do to respond to that moment, perhaps, was to shift some portion—all of it or some critical amount of it—online.

Jeff Cobb: [00:14:14] That was the guiding question, which is a key part of this tool that we wanted to highlight. Next would be the initial and bounded assessment.

Celisa Steele: [00:14:23] This is as you're looking at, "Okay, what's changed? What disruptions, opportunities, or critical shifts are we now facing, given what's changed?"

Jeff Cobb: [00:14:34] What assumptions no longer hold? Have expectations about timelines, capacity, funding, or relationships been upended?

Celisa Steele: [00:14:44] And then what feels most immediate? Are there "all hands on deck" demands that are requiring urgent, immediate action? What capacity might you need to free up to be able to respond to those kinds of urgent demands? Over what period of time might you need to respond to those kinds of demands?

Jeff Cobb: [00:15:03] What feels most uncertain? What remains unclear or in flux?

Celisa Steele: [00:15:08] And then how do these shifts challenge or reaffirm your guiding question? The idea here is that you've worked on setting a guiding question. Now you're thinking through these questions to really assess the current moment and understand it. As you're articulating things around what's changed and what assumptions no longer hold—all these things we were just talking about—that might take you back to your guiding question and realize we need to refine that or focus it a little bit more or add a nuance that we didn't have in there. This is iterative. You're going to shape that guiding question initially, but that doesn't necessarily mean it's 100-percent set and solid. You might need to revisit it as part of this process.

Jeff Cobb: [00:15:48] You can probably tell, even from hearing this—and we do encourage you to go look at the show notes on this as well—these are fertile points of discussion. If you put out these sorts of questions within your organization, you're going to get good discussions around them. Again, I would emphasize not being reactionary around this, to continually be probing around “Is this real? Is this true? And what's the risk here?” We've talked about risk in other situations where you're looking at how serious is this—whatever it is that you're coming up with in the assessment—and how likely is it? Is it true? Is it serious? Is it likely to happen? These should all be parts of how you're making that assessment.

Celisa Steele: [00:16:26] Once you have that assessment of the situation, you have your guiding question, then you're going to want to look at your projects and your commitment, basically your workload. You're going to list out what you and your team are working on. This might be new courses under development. It might mean course revisions. It might mean some of the work you're doing around evaluation and measurement. Etc. Etc. Everything that you usually do, you want to generate that list of it.

Jeff Cobb: [00:16:52] It strikes me, as we're talking through this—and I was struck early on in looking at this approach—that it does align in many ways with Rumelt's approach to strategy that we've talked about before, where you do have the initial diagnosis, you develop a guiding policy (a kernel of your strategy), and then you do have these key actions that you're looking at taking going forward. Those all align with these first three areas that we've highlighted here.

Celisa Steele: [00:17:20] And so, once you have the project commitment / workload list, what you want to do is categorize those into one of five options. I'll quickly run through the five options, and then we'll unpack each one a little bit. So the five options are “still relevant”—you're going to continue forward with that. The second is “emerging priorities or adaptive shifts.” Third category, “pause and recalibrate.” Fourth category, “unknown status or unknown approach.” And then fifth is “honor and let go.”

Celisa Steele: [00:17:52] In “still relevant,” you're going to continue forward. These are priorities, these are streams of work that remain aligned with your purpose, and they're feasible given the current conditions. Again, if the current situation has perhaps created challenges or made it hard to do certain types of work, that's not this category. This is the kind of thing that you already had as a priority, and you can continue to do under current circumstances.

Celisa Steele: [00:18:16] The next area, the “emerging priorities or adaptive shifts,” these are things that suddenly are rising in their priority level. Maybe they've become more important

given what's happening in the world or in your learning business. And, to better respond to those new conditions, you need to prioritize those efforts. Maybe there are even some new types of work that you're adding into that category. Third category, "pause and recalibrate," these are things that you had been doing, but you need to pause them now because maybe they're not feasible or because you need to reallocate some resources towards other priorities. The fourth category is "unknown status or unknown approach." These are where you are going to park things where you need more data, where there's too much in flux to know whether it makes sense to move forward with them or whether they're ones you're going to need to pause and recalibrate, so you put them in this bucket.

Celisa Steele: [00:19:15] And then the final category is around "honor and let go." In that category, there might be things that were part of your strategy, they were part of your activities that simply aren't going to happen now because of the changing circumstances or conditions, and so you're going to put them into this bucket, and you're going to honor it so that you recognize that this was an intentional decision to no longer carry forward these priorities. Those are the five buckets that you're working to categorize your efforts into as part of this strategy triage effort.

Jeff Cobb: [00:19:51] Urquilla does highlight, warns about some common patterns to watch out for as you're going through the process, as you're facilitating use of this Strategy Triage Tool. I suspect these are going to sound familiar to listeners, but the first one is avoidance—ignoring or delaying decisions. I think we've all seen this happen in strategy discussions, and there's a recommendation here to interrupt that by grounding the group and normalizing that desire to avoid and start with broader strokes. So what's visible now? What can we engage with now that we don't have to feel like we need to avoid, just to help move that conversation forward? Another pattern is overcommitment—taking on too much and exhausting your capacity. Maybe everybody is eager to dive in and do the triage and get going, but you just take on too much for it to be realistic. A way to combat that, to interrupt that, is to set some clear targets. There are some manageable targets. Let's free up X amount of dollars around this, or let's free up two staff members to look at this and make that commitment realistic.

Jeff Cobb: [00:21:00] Another pattern is rigidity—clinging to plans or assumptions that no longer fit. In the world we work in, this is the "we've always done it this way" type of mentality. In this case, you have to ask—whoever's involved in this process—"What is it that we're defending, and to what end? Why are we doing this? What would be possible if we were to release it, if we were to let it go? What's that going to make possible for us?" And then the fourth pattern that's highlighted is indecision—getting stuck in the unknowns. We've seen this

happen so many times. I'm sure folks have experienced this as well, that you don't know what you don't know, so you get mired and don't make any progress forward. In this case, an approach is to set commitments for exploring those unknowns. What do we need to learn and by when? Revisit that regularly. That's the type of question we'll often ask clients, pretty much always ask clients, as we're setting up a strategy engagement. "What do we need to know that we don't know now?" And we start to develop a plan for getting at that.

Celisa Steele: [00:22:03] We talked about why. We've just been talking about what and all these questions and the process that underlie this Strategy Triage Tool. We wanted to also talk a bit about who. We often get a question about who when we talk about strategy with organizations. I will say that the who isn't one that Marian Urquilla tackles directly. She does note, though, that the tool can be used by individuals, or it can be used by teams within a single organization, or it can be used for networks, for alliances that span multiple organizations. We did want to talk a little bit about the who, though, and, for us, there're at least two who questions. First, there's the who in the sense of "what type of organization" should engage in this type of strategy triage.

Jeff Cobb: [00:22:51] Our answer there is all of the above—it applies to and benefits all types of organizations. There's really no type of organization that's not experiencing some level of change, whether it's the VUCA turned up to 11 or whether it's more seemingly business as usual, but you need to be looking at what's going on out there and adjusting accordingly. Really, any type of organization can benefit from this type of approach.

Celisa Steele: [00:23:14] That's at the organizational level. But there's also who in the sense of "who should be at the table." Who should we involve once we decide to engage in this kind of strategy triage work? Here the answer is nuanced, but a big part of it is about making sure that you have the diversity of perspectives represented that you need to have represented.

Jeff Cobb: [00:23:39] Yes, you heard the questions and discussion topics that we mentioned earlier. You need people who can help you describe and understand the current situation objectively and deeply and generate that list of what you're doing and sort the list out, prioritize the list. But, to navigate that diversity, you also need a strong facilitator.

Celisa Steele: [00:24:02] That's right. When you have a lot of different points of view and perspectives, you're almost certainly going to have some level of disagreement around priorities or decisions to take.

Jeff Cobb: [00:24:13] In fact, if you don't have disagreement, you've probably got something wrong going on.

Celisa Steele: [00:24:17] You need a facilitator that's going to help you navigate those conversations so that you can all come to a shared, agreed-upon decision, even if it's not what a particular individual necessarily believes is the best answer, but they can get on board with the approach that you've taken. You need a strong facilitator to help navigate that, help align those different perspectives into a truly shared understanding of the situation.

Jeff Cobb: [00:24:42] I think there's a next level down on that second who question about who should be at the table. There's the aspect of who's prepared to do this work objectively and honestly, which is so important to this process.

Celisa Steele: [00:24:58] That gets back to the diversity of opinions. You need to have people who understand that, who are open to having their minds changed, who are open to coming in with whatever they know currently but to hearing new things and to shifting that. If you have people who are too ingrained in a particular way or particular viewpoint, they're not going to be as effective in this process because they might not be willing to consider doing things differently.

Jeff Cobb: [00:25:24] That may require laying some groundwork, educating potential participants, and, again, strong facilitation. This is one of those classic situations—and it's a little self-serving for me to say this—where having that objective outsider come in to help facilitate these types of situations can be valuable because often you need that third party to make these situations work. I'll note that that kind of facilitation tends to be even more important the more volatile or risky a situation an organization finds itself in because those are the types of situations where people can get reactionary very quickly. They can dig in very quickly, and you need either the internal organizational discipline to be able to navigate that, or you need some help from outside in navigating that.

Celisa Steele: [00:26:10] It's worth noting that, when you're dealing with volatile, disruptive times, time is of the essence. You're working to respond to an emerging issue. That means you need to respond with some level of rapidity; you need to do something. It can be better to move ahead than to wait for 100-percent participation if getting that 100-percent participation is going to slow you down. When you're weighing who needs to be at the table, it's about do you have that diversity of perspective, do you have people who are willing to engage in honest assessment of the situation and of the work that needs to be done or maybe not done, and are

they available. Can they engage? Can they show up and be there for whatever meetings you need to have? All of those things feed into who needs to be involved.

Celisa Steele: [00:27:05] Our recap and some suggested to-dos are still to come, so stick around.

Jeff Cobb: [00:27:10] At leadinglearning.com/episode447, you'll find show notes, a transcript, and options for subscribing to the podcast.

Celisa Steele: [00:27:18] If you enjoy the Leading Learning Podcast, please do us and a colleague the favor of sharing this show with one other person who you feel would appreciate and get value from it.

Jeff Cobb: [00:27:29] To recap, we talked about why reassessing strategy is important and acknowledged the fact that when to reassess won't always occur according to a predictable schedule. Sometimes unexpected events inside or outside of your learning business will lead you to the need to reassess.

Celisa Steele: [00:27:47] For those unexpected times when a strategy reassessment is needed, we offered the Strategy Triage Tool developed by Marian Urquilla. It's a simple tool. It uses a series of questions to focus thinking and then to aid in decision-making, particularly decisions around what activities might need to be paused or even stopped entirely in light of the changes or events in the environment in which you operate.

Jeff Cobb: [00:28:15] And we talked about who to involve. Especially in VUCA times, the who is a balance of casting the net broadly to involve those impacted by the decisions and trying to move quickly. Given the diversity of viewpoints you're aiming for and the potential for anxiety given the disruption, strong facilitation is often critical.

Celisa Steele: [00:28:37] In terms of to-dos, we recommend you keep the Strategy Triage Tool handy for the next time your learning business faces an event that has implications for your strategy, and then try it out.

Jeff Cobb: [00:28:49] Keep in mind that you can use it on your own. In fact, you might want to try it out on your own before working through it with your team. That would allow you to see where you have questions about the process and make sure you feel it would be valuable to work through as a team.

Celisa Steele: [00:29:04] Lastly, I'll note that the patterns that Urquilla calls out and cautions us to watch for—avoidance, overcommitment, rigidity, and indecision—are patterns that it can be helpful to be aware of and to address even outside of VUCA moments.

Jeff Cobb: [00:29:22] Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by Moarn]