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Researchers Into Management

Day 3
Strategy and Strategic Management

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Reflective practice

- What has been the key learning for you from the session on *Effective Communications*?

- How have you/will you put your insights into practice?

Strategy and Strategic Management

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- 2 words

- Your intention for today

Unit 2 Managing for Efficiency and Effectiveness

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Aim

To provide an overview of strategy development and the strategic planning process

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Specific Objectives

- Exploring what we mean by strategy

- Considering Manchester 2020 – The Strategic plan for Manchester University, how well it informs work in the University
- Senior leader guest speaker

- Exploring techniques and tools commonly used in strategic planning (within the context of our organisation)

- Exploring the middle manager role

- Reflecting on learning, insights and practice

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What is strategy?
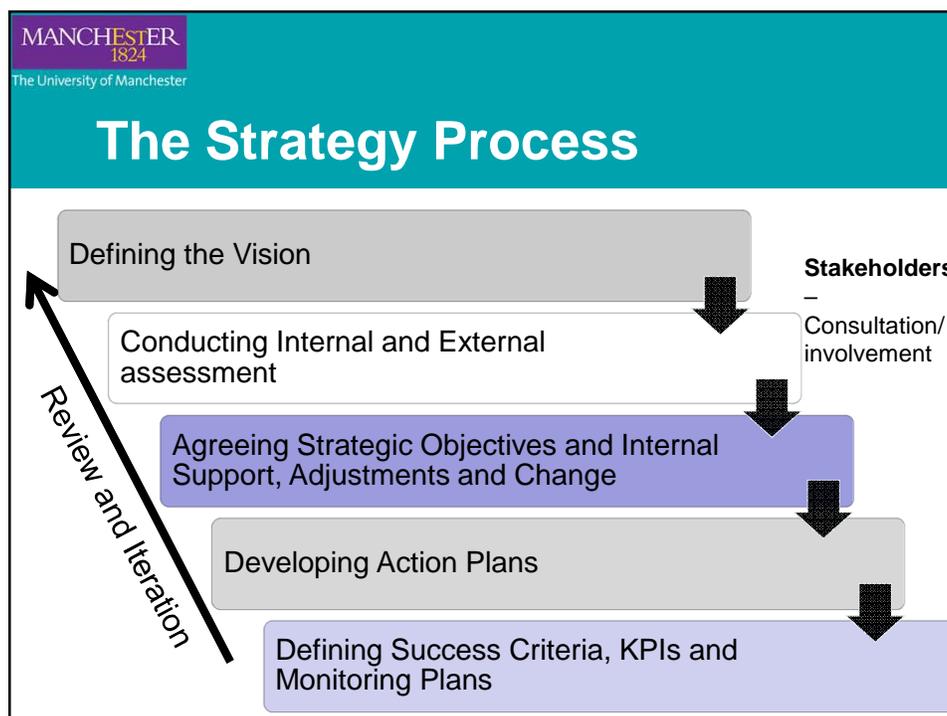
"Strategy is the *direction* and *scope* of an organisation over the *long-term:* which achieves *advantage* for the organisation through its configuration of *resources* within a challenging *environment*, to meet the needs of *markets* and to fulfil *stakeholder* expectations".

Johnson and Scholes (2002) Exploring Corporate Strategy

Key strategic questions

- Where do we want to get to?

- Where are we now?

- How do we get there?

- How do we best mobilise support?

The Strategy Process

Defining the Vision

Conducting Internal and External assessment

Agreeing Strategic Objectives and Internal Support, Adjustments and Change

Developing Action Plans

Defining Success Criteria, KPIs and Monitoring Plans

Stakeholders –
Consultation/ involvement

Review and Iteration

Key University Documents

•**Strategic Vision** – approved November 2011

•**Manchester 2020 Strategic Plan** – (Updated October 2015)

•**Sub-strategies and plans** e.g. *Research Strategy* (2011), refreshed in 2015 along with a Statement of Research Expectations. And the *Research Beacons:* examples of pioneering discoveries, interdisciplinary collaboration and cross-sector partnerships that are tackling some of the biggest questions facing the planet: Advanced Materials, Cancer, Energy, Global Inequalities, Industrial Biotechnology (https://www.manchester.ac.uk/research/beacons/)

Our Strategic Vision

"*We want to be ranked as one of the world's leading universities by 2020,but we also want to be better recognised for our impact on the world, for the revolutionary spirit that defined our history and will drive our future success, and for being part of Manchester.*"

http://www.manchester.ac.uk/discover/vision/

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Exercise…

What do these vision/mission statements say to you about the type of university this is?

Can you identify which vision/mission statement belongs to which UK university?

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Exercise…

What is the strategic vision of your research group?

•How do you know?
•How easy is it to find?
•How connected is it to Manchester 2020?
•How connected is it the Research Beacons?

Our Strategic Goals

Three Core Goals:
- World-Class Research
- Outstanding Learning and Student Experience
- Social Responsibility

(Now) Six Enabling Strategies:
- Quality People
- World-Class Estate
- Financial sustainability
- A Reputation for Excellence
- An International Institution
- Quality Services

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KPIs – how – more next time

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Strategic Alignment
What will we measure to check if we are achieving the operational goals?

The 4 Es
Economy
Efficiency (ILM)
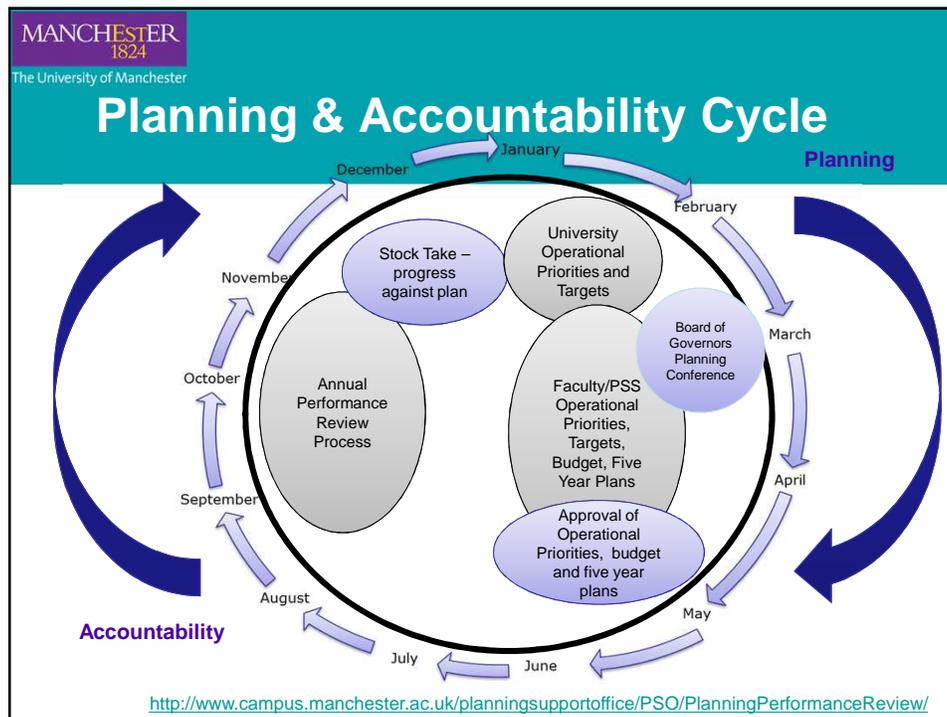Effectiveness (ILM)
Ethics

KPIs - linkages

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Strategic Objectives

Operational Objectives

Operational Plan

KPIs

Individual Objectives
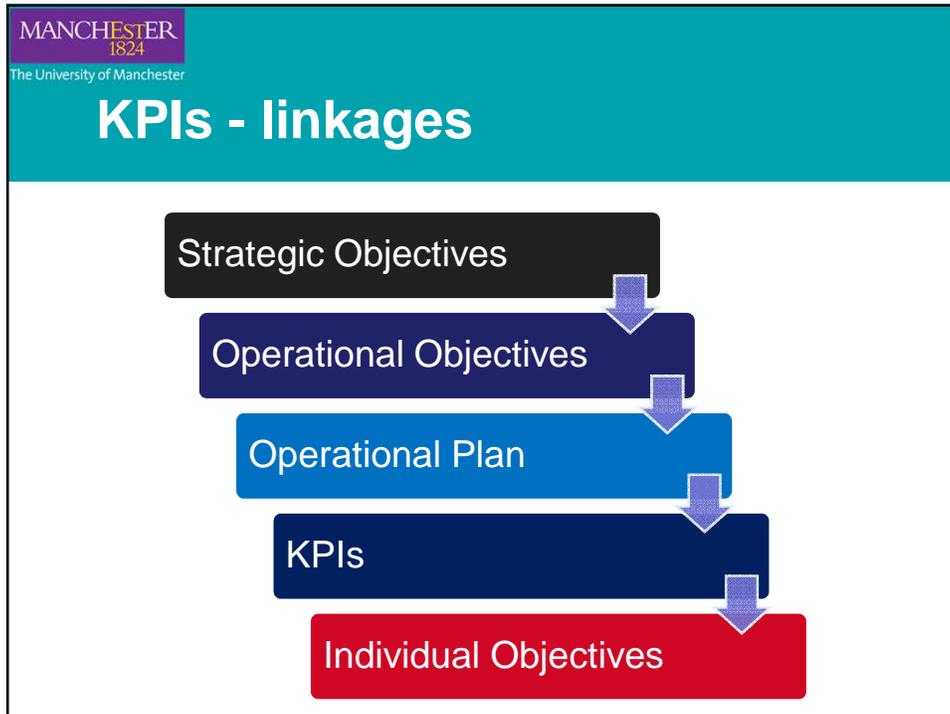
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University Operational Priorities

Operational priorities are agreed every year at University level as well as by the Professional Support Services (PSS), Faculties, Library and cultural institutions. They are used to record and track activity taking place in support of the strategic priorities of Manchester 2020.

•See the Operational Priorities 2017/18
•See the PPS Operational Priorities Summary 2017/18

http://www.staffnet.manchester.ac.uk/planning/planningperformancereview/operationalpriorities/

Planning & Accountability Cycle

http://www.campus.manchester.ac.uk/planningsupportoffice/PSO/PlanningPerformanceReview/


Annual StockTake report

The **StockTake Report** provides a detailed appraisal of progress against the goals and key performance indicators of the University's Strategic Plan, Manchester 2020, and is a key component of the University's Planning and Accountability Cycle.

http://www.staffnet.manchester.ac.uk/planning/planningperformancereview/2020stocktake/
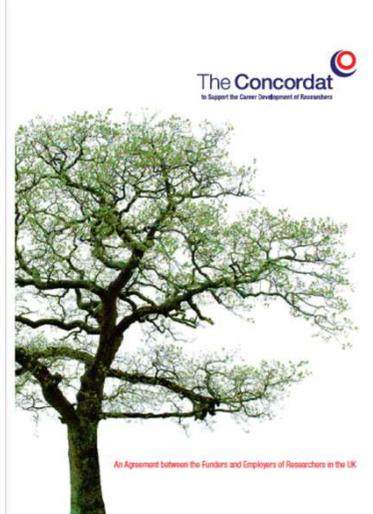
Strategic tools and techniques

- Stakeholder analysis – political/communication approach for strategy implementation

Stakeholder Analysis
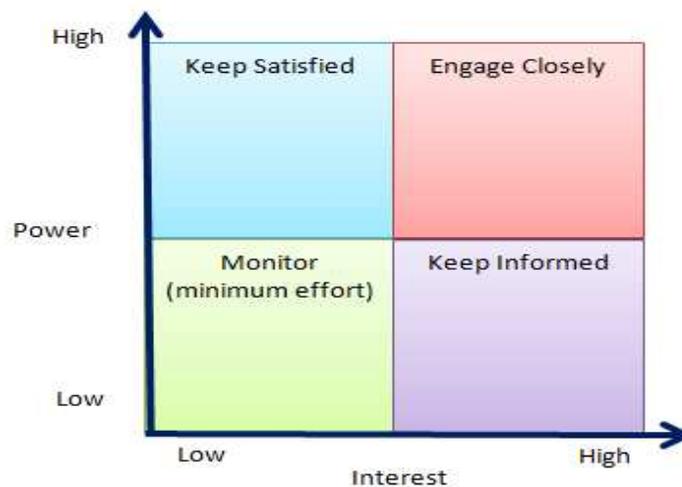
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Exercise…

The **University's Concordat Action Plan** details 21 actions for addressing each of the principles:

•Recruitment and Selection (principle 1)
•Recognition and Value (principle 2)
•Support and Career Development (principles 3 & 4)
•Researchers Responsibilities (principle 5)
•Diversity and Equality (principle 6)
•Implementation and Review (principle 7)

The **Research Staff Development Working Group** are responsible for implementation and monitoring.

But there's an issue with engagement and ownership with the current plan…

The **Concordat**
to Support the Career Development of Researchers

An Agreement between the Funders and Employers of Researchers in the UK

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Exercise…

Recognition and Value (principle 2)
Action 2.2. Strengthen research staff representation across the University to ensure research staff are effectively represented at School, Faculty and Institutional levels.

Enabling actions:
(i) Establish effective Research Staff Fora in all faculties (ii) Develop and implement a faculty and institutional communications strategy and plan for research staff

Task: For the audience you are allocated, perform a detailed stakeholder analysis using the modified version of the tool.

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Strategic tools and techniques

- Stakeholder analysis – political/communication approach for strategy implementation
- PESTLE analysis – strategic context, external environment

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PEST – Environmental Analysis

Political

Economic

Social

Technology

Legal
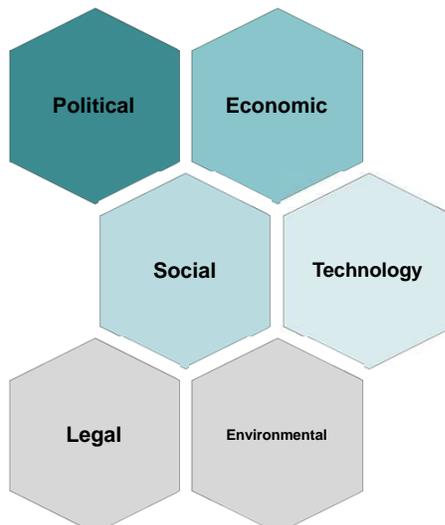
Environmental

Changes in the external environment that may impact on the capacity of the organisation to achieve its vision and goals

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Exercise…

Conduct a PEST analysis for the University of Manchester

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Strategic tools and techniques

- Stakeholder analysis – political/communication approach for strategy implementation
- PESTLE analysis – strategic context, external environment
- SWOT analysis – strengths and weakness against key objectives

As a manager, how would you conduct a SWOT analysis?

1. Share the goal: What is the aim of your SWOT analysis?
2. Collect 'data'. No filtering, no categories.
3. Take a break.
4. Filter, sort, categorise, analyse, prioritise.
5. Create an action plan and put it in place.

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SWOT
Kick-starting strategic thinking

Pros
- Information from various perspectives.
- Focus on key areas.
- Simple. Quick.
- Can encourage unusual and non-conformist issues to be raised and discussed.
- Can visualize how you can turn threats or weaknesses into strengths or opportunities.

Cons
- Influenced by vested interests.
- What is relevant?
- Oversimplifying. Often no data to verify statements.
- Disagreements can arise and need to be resolved.
- Opportunities and threats might seem to balance each other out, when in fact the threats could pose a greater risk.

SWOT Analysis - Capabilities

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	STRENGTHS	WEAKNESSES
Internal	• What do you do well? • What makes you unique? • What do you do better than others? • What do others see as your strengths?	• What could you improve? • Where do you have fewer resources than others? • What do your competitors do better than you? • What are others likely to see as your weaknesses?
	OPPORTUNITIES	THREATS
External	• What trends in the inner/external environment could you take advantage of? • What opportunities are open to you? • How can you turn your strengths into opportunities?	• What trends or conditions could negatively impact you? • What is your competition doing? • What threats do your weaknesses expose you to?

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Exercise…

Conduct a SWOT analysis for the capabilities of your Research Group

Areas of potential strengths and weakness

- Brand/reputation
- Financial and other assets e.g. effective infrastructure
- People - number, skills, capabilities
- Organisational culture
- Operations

Strategic tools and techniques

- Stakeholder analysis – political/communication approach for strategy implementation
- PESTLE analysis – strategic context, external environment
- SWOT analysis – strengths and weakness against key objectives
- Core competencies – distinctive organisational differences
- Balance scorecard - align business activities to the vision and strategy of the organization, improve internal and external communications, monitor organization performance against strategic goals.

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Core competency questions

- What do we do especially well?
- How do we consolidate our competency base and use it to enhance market share?
- How do we make best use of technology to support operations and delivery?
- How do we crystallise and communicate our brand?

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Balanced scorecard

A management system that enables your organisation to set, track, and achieve its key business strategies and objectives.
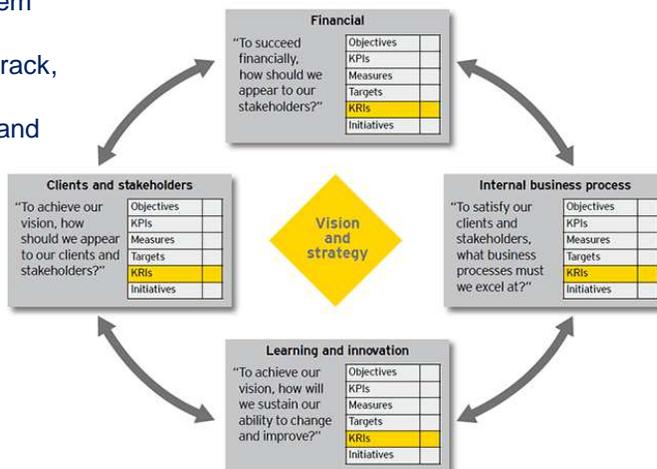
Source: Adapted from *The Balanced Scorecard* by Dr. Robert Kaplan and Dr. David Norton

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Ensuring That All Parts of Your Organization Work in Harmony?

The McKinsey 7S Model

The basic premise of the model is that there are seven internal aspects of an organization that need to be aligned if it is to be successful.

https://www.mindtools.com/pages/article/newSTR_91.htm

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Middle management skills

- Understand and interpret organisational strategy
- Act as a change agent
- Proficient communicator
- Develop core competencies
- Maximise performance potential
- Facilitate knowledge sharing
- Provide expertise
- Lead by example

Source: The role of modern middle managers
http://www.southampton.ac.uk/hr/services/line-managers-role/index.page

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Strategic plans at faculty and school levels?

Read Nancy Rothwell's Leadership Insight

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Reflective practice

What are your key takeaways from today?