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## Leadership Academy: Strategic Thinking

### Transcript

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>> Andrea Falzarano: Welcome to the ASHA Leadership Academy webinar, Strategic Thinking. This webinar content is appropriate for entry and emerging leaders. I am Andrea Falzarano, Director of Association Governance Operations at the ASHA National Office. We planned today's webinar topic because a key determinant of career success for many communication science and disorders professionals is their ability to identify new opportunities to add value in both their organizational and volunteer roles. Each of you should have a copy of the handout, which includes speaker information and slides. If you do not have the handout, please pause the webinar now and access a copy from our website. You will need a copy for interactive sections of this presentation. At this time, I would like to welcome our presenters, Kevin Nourse and Alice Waagen.

Dr. Kevin Nourse is an executive coach, organization development consultant, and facilitator, with nearly 20 years of progressive experience in both for-profit and non-profit organizations. He is a professional certified coach through the International Coach Federation and has extensive experience coaching leaders in the areas of emotional intelligence, career planning and transition, influence, risk-taking, and strategic thinking. Dr. Alice Waagen is a business consultant who teaches management skills to business leaders. Alice has conducted hundreds of workshops and training classes at many of the country's top fortune 500 companies, non-profit organizations, and government agencies in the Washington, DC area. In just the last five years, more than 132 leaders from 26 regional organizations have graduated from her unique leadership development workshop series. Now let's begin. Over to you, Kevin.

>> Kevin Nourse: Thank you, Andrea. Welcome, everyone, to the Leadership Academy webinar on Strategic Thinking. So, today, we're going to pass along some tools and techniques that you can use quickly after the webinar associated with strategic thinking. We're happy to have everybody participate in the webinar, and I would, first, like to review our disclosure statement. I am Kevin Nourse, principal of Nourse Leadership Strategies, and I am an independent contractor. I am being financially compensated by ASHA for the Leadership Academy webinars, and I do not have any non-financial interests with ASHA. My colleague, Alice Waagen, is a subcontractor to Nourse Leadership Strategies. She is also an independent contractor, financially compensated by ASHA for the Leadership Academy webinars, and without any non-financial interests with ASHA. We'll get into our agenda in just a moment, but I did want to point out that there are two audiences with our webinar today. We've got those that are in the classroom live with our production, and those that are listening on the webinar, on the recording. For those listening to the recording, at various points, we're going to hit the, we're going to share a reflection question, and at that point, we'll ask you

to hit the pause button so that you can take some notes and deepen your learning, and then when you're ready to resume, just hit the play button and rejoin us. So, with that, I'll toss it to my colleague, Alice, to take us down the agenda.

>> Alice Waagen: Well, thank you, Kevin, and I likewise want to welcome everyone to this webinar today. Um, strategic thinking is an important topic, and what we'll be doing is going through some of the fundamentals about strategic thinking. It is a vast area of study, and, in fact, we have some references in the back in the appendix for you to continue your study with this, but what we're going to do today is, pretty much, hit the high points. We're going to start by talking about the key concepts, how we are defining terms like strategic thinking, strategic planning and so on. We're then going to mention that there's three modes of thinking, and we're going to define them and show you how they are all useful in solving problems and making decisions. We're going to look at what are some opportunities you can use for strategic thinking, and lastly, provide you with a tool called a SWOT analysis, a very useful tool to do strategic thinking and planning. So, let's start by talking about our key concepts. What is strategy? I think what we have on this page is perhaps the shortest definition in all of the webinars that we're doing in this series. Strategy, a defined plan of action to achieve a goal. It's as simple as that. I have a goal, I have an outcome, I have a result I want to achieve, a strategy is my plan of action to get there. We tend to think of strategy in terms of time, long range, and that is definitely part of what we'll be talking about today, but in essence, it simply is a plan of action to achieve a goal.

Now, let's look at the concept of strategic thinking, since that is our subject for our talk today. It's a mindset and tools that you can use to make sense and respond to significant challenges, issues, and trends. It involves asking powerful questions, experimenting with different scenarios, and surfacing and testing assumptions. The basic issue here with strategic thinking is this concept of challenges, issues, and trends. A person is good at strategic thinking when they are looking ahead and saying, I'm seeing A, B, C, does that tell me D is going to come next? In which case, what am I going to do about it? That's what we mean by strategic thinking. Now, strategic planning is actually a process used to create a plan for achieving, again, a defined future or an organizational vision. Um, most strategic plans cover a three to five-year window, and I remember, many years ago, they covered, like, five to ten, but I think with the rate of change we're going in now, most people look at it much more three to five. They're used to define priorities, and also, as a decision-making tool. So, a plan is a thought process, a mindset, etc. Now, why are these ideas so important for CSD professionals? Well, strategy is a critical element for anyone who wants to succeed in leadership. Um, if you study the business press at all, there's so many companies that fail, because they're so focused on the day by day, they're not looking ahead. I think anyone in healthcare today, with the different challenges and upheavals out there, knows that the successful organizations are those that are really looking ahead, and successful leaders are those that are looking ahead. Kevin, anything to add to our definitions?

>> Kevin Nourse: Yeah. Um, just to underscore that, um, it's interesting, in the evolution of, um, really, this competency, leadership competency, what we know is that, um, you know, a lot of organizations actually, um, disassembled their strategic planning function years ago, because what they found is that they would create these plans, um, and then they would sit on the shelf, and, in fact, I worked for a large consulting company, and we would do that, we would come in and create these beautiful, um, binders, and the client would promptly put them on the shelf, like, been there, done that, and, so, the shift had to be from creating this plan that was, you know, useful, but not used on a day to day basis, to how do you embed the mindsets of thinking strategically in managers and leaders and even, you know, individual contributors, um, brains, so that when new things emerge, um, they can respond in kind and get ahead of the curve as it relates to it. So, it really is part of an overall process. There's still a place for strategic plans, but, again, no strategic plan can anticipate everything that's going to evolve and change in this world in, really, pretty much every industry. Yeah, so, back to you, Al.

>> Alice Waagen: Well, I think you're going to help us next with some, um, research trends that are out there.

>> Kevin Nourse: That's right. So, with every webinar, we look at kind of what's emerging in terms of this competency, so a few things that, um, I found in the literature. Um, really starting to think about the, how strategic thinking is embedded in organizations in terms of what are some of the inputs, um, to this process, and then, ultimately, what are the outcomes and the impact of it, so that was one study symbolic of what's going on. Um, the other part of it is starting to think about, um, how do you cultivate strategic thinking abilities, because, again, of course, so many of the organizations I've worked with, and even leaders I've coached, it's often their developmental imperative, which is to become more strategic. Well, it's a fairly complex process, and, so, the idea of getting more research out there about how do you impart those skills to individuals, and then, also, thinking about, um, the use of online technologies to do scenario-planning is one way to teach it. So, those are some of our emerging themes, and I think, Alice, you're going to take it from here with a reflection.

>> Alice Waagen: Yes. All right, this is the first of our reflective questions, and, um, let me set the stage for the question, and then I'd ask those of you who are listening to the recording, hit pause, and make some notes here on your answer to the question. Um, I'll ask those who have joined us today in this webinar to share their answers in the chat box. So, what challenges or big problems exist in your organization today that would represent strategic opportunities for you? So, what's out there? What are you seeing in terms of trends, um, issues, challenges, problems, that could be a strategic opportunity for you? Again, those listening to the recording, hit pause and think about that question and make some notes, and those, um, who are with us today, please put your answer in the chat box. Kevin, what are you seeing out there in terms of challenges, um, that you're seeing with your clients that actually could be opportunities?

>> Kevin Nourse: It's, you know, it often varies by industry, and, so, I'm working with clients in a number of industries. With healthcare, I see the, um, there's a lot of things going on. One of them is, um, again, the uncertainty with the future of the Affordable Care Act and the reimbursement models, and I know a number of my executive clients in, um, healthcare are really struggling with that. Right now, it isn't necessarily seen as an opportunity as much as a threat, um, but even within healthcare, there's other aspects, for example, the use of nanotechnologies to do, um, to basically inject nanotechnologies into patients so that they can monitor and track, um, their health when they're living it, when they're at home, in a sense, so finding really great ways, new innovation in terms of how do we move forward with that, because there's a whole list of challenges associated with using those virtual technologies in terms of, um, patient care and public health. Um, so, those are a couple in the industries that I know of that I'm working with, some of the challenges going on. How about for you in some of the clients you're working with? What do you hear?

>> Alice Waagen: Well, it's interesting, you use the word virtual, I think that is such a prevalent issue, is moving away from, um, face-to-face interactions to, you know, more virtual. Um, many of my clients are encouraging, and sometimes even requiring, um, a number of days working from home, and that has huge implications that I think we're only beginning to understand in terms of connectivity and bonding and teamwork and everything else, you know, and heavily relying on, um, electronics and technology to get the work done. I'm seeing some very interesting themes, as we'd expect, from our participants today. Let's see, both Michelle and Bob and Valerie, um, mention in the healthcare arena, the whole changes in reimbursement, um, of course, the issues with the Affordable Care Act and its permutations that it keeps going through, definitely challenges out there. Lori mentions telepractice opportunities. Again, that whole virtual world, I think is hitting almost everyone. Bob mentions in university, um, accreditation and changes in higher ed. Yes, you know, I tend to forget, I've got a few clients in the education field, and I think K all through higher ed is under tremendous scrutiny to achieve, um, results and match expectations. Um, Carol's got a new program that's growing rapidly. Oh, rapid growth is always, yes, it has its benefits and issues. Martine mentions a number of medical facilities declining students. Oh, that's bad, because you've got to have your clinical work, um, in order for people to, um, be certified. Um, yeah, and more laws. Yeah, lots out there. I don't think there's an industry out there now that isn't faced with a whole lot of pressure to change, and change in ways that can be, um, an opportunity, or it can be kind of a threat, depending on how you look at them. So, Kevin, I think you're going to start us off talking about types of thinking.

>> Kevin Nourse: That's right. So, we're going to peel the onion of strategic thinking through different lenses, and one of them is decomposing strategic thinking, kind of a broad mindset, into its component, ways of thinking, and these terms may be familiar to you, but I'd like to go through them one on one, and we'll explore them in terms of examples. So, it shows these kind of oriented to three different boxes, but you might think about these as overlapping Venn diagrams, to some extent, because there's a little bit of overlap. So, we start, first, with, um, maybe the critical thinking, or what we refer to

as analytical thinking. Um, so, it's the idea of converging, and, so, when we think critically, um, we're trying to, um, surface assumptions, play what if's, the whole scenario-planning, to try to anticipate possibilities. Um, we could do that, and I know, for example, back in the 70s, when a lot of the, um, current school of thought around strategic thinking was going on, scenario-planning was actually used by the, um, the oil and gas industry. In essence, what they were trying to do was to try to get ahead of OPEC and some of the issues going on with, um, the Middle East and how, um, actions there impacted both oil supply and price in the United States, and so this idea of, um, scenario-planning emerged really with Shell Oil, who was one of, really, the first organizations to start doing that kind of thing. So, it's through scenarios that we can surface, um, some of our underlying assumptions and really test those assumptions and try to surface them. So, that's our critical thinking.

We then look up at, um, creative thinking, which we might consider to be more divergent thinking associated with innovation. Um, so, it may be that we're still surfacing assumptions, but I think a lot of creative thinking comes when, um, we're able to take, um, seemingly disparate ideas and apply them to, say, our organization or our challenge. So, what if, you know, what if we're struggling with an issue, we can go to a different industry and look at how they've handled it and maybe apply it kind of uniquely to what we're doing, or we have a clearer sense about, um, a need of our customers or our members. For example, the whole concept of post-it notes with 3M, it was a fascinating story. One of the engineers actually, um, struggled with, um, he would go to his Bible study, and he would put in a sheet of paper to hold his place in his Bible, and it kept falling out. That led him to start thinking about what kind of adhesive could he develop that would not destroy his Bible, but it would allow, um, you know, enough stickiness to hold the post-it note in, and so that kind of innovative thinking, starting, first, with I've got a problem, and I want to figure it out, and really kind of challenging existing assumptions and conventional wisdom about what is and isn't possible. So, that, to me, was a great example of creative thinking, which, you know, can certainly lead to innovation. Then the third domain, um, third type of thinking, systems-oriented thinking, is based on that concept of, um, you might have heard the idea that the butterfly flapping its wings in, um, Singapore creates the tornado in Oklahoma, that the inherent nature and interconnectedness of systems throughout the world and throughout our lives, and that causes effect, and effect is caused, so we start to look at patterns and interrelationships, and, so, um, for example, I notice that, um, many times, we create more problems if we don't think more from a systems-oriented perspective.

For example, I worked in the broadcasting industry with, um, Ginette Broadcasting, and at the time, Ginette owned about ten TV stations. It was a syndicated program called USA Today on TV, and one of the things they did is they forced their TV stations to run this program, um, and they moved the evening news, um, back a half hour. So, it was one of those cases where they really didn't think very systems-oriented toward, you know, that change, because what ended up happening is that, um, there were pretty significant impacts, because, you know, um, America was used to seeing Dan Rather at 6:30 every night, and so there were a lot of unintended consequences of moving that.

So, I think it would be, um, you know, it was just a really classic example where thinking through the whole systems implication of a decision or an issue, um, would inform thinking and, um, allow leaders to be much more strategic around that. So, Alice, anything you want to add with our types of thinking?

>> Alice Waagen: Well, I like the way you opened and said it's like a Venn diagram, and there's some overlaps. You know, I think the point, the real point here is when you're dealing with a thorny problem or a real challenge or trying to make a tough decision, blending these three, or using all three gives you a much more robust solution. People that tend to be creative thinkers and always think creatively are thinking so broadly that, sometimes, nothing gets implemented, nothing gets done. Um, on the other hand, people that are very analytical and critical thinking tend to get stuck in what we call analysis paralysis, and nothing, you know, may not get done, and, you know, system-oriented thinking, always looking outward for the context, you can see there are three components that, together, make for the best solutions, and only doing one or the other can end up basically imbalanced or without decisions being made. So, let's look at a tool, a sample tool that will help you with one of our types of thinking, and that's critical thinking. This tool is called the five why's, and it's very simple. One puts an issue or a challenge out there and then asks why is that and generates an answer, and then why is that, and as you see, it keeps going on. I always say this reminds me of the annoying child, because it's why, why, why, why, over and over again, but you can see, again, how one would drill down.

So, let's look at our example here. Staff in our clinic are resistant to a new scheduling software. So, there's a new software, everyone's got to use it, and there's huge resistance. Well, why could that be? Well, they may be fearful of change. Why? Because the last software implementation failed, or they have, they're afraid this might hurt their productivity. What's another reason why? They don't want to learn a new software, they don't have enough time, and so on. I won't read all the way down. Now, the interesting thing about generating all these why's is you can see at the end that if any one of these why's would call for a different course of action or a different solution on the table. By generating enough reasons why, a person can then go and dive into these why's and see which one is more probable or more prevalent or more important and begin then to go to the solution phase of it. So, we're going to give you an opportunity to test this out, and our next reflection, what I'd like you to do is think of some of the examples we listed earlier, um, or others in your professional or volunteer role, where the five why's could help you think critically. So, again, maybe a thorny issue that deep diving in it, thinking critically might give you some very interesting insight or solutions. Those of you who are listening today to the recording, um, push pause and put some of your ideas out there, and those of you who are, um, with us today in the classroom, put your ideas in the chat box. So, Kevin, what do you think about that? Have you used the five why's in any way that's, um, been useful with your clients or seen it being used?

>> Kevin Nourse: Yes. Um, I reflect on the days I was an HR director with a large consulting company, and this was a number of years ago, and we struggled, um, at the

time, turnover was significant, and, um, at the height of the dot com craze, many years ago, we struggled with turnover hitting, you know, 20, 30 percent, and we'd estimated that the cost of turnover was two and a half times salary, so every time one of the consultants would leave, it was costing the firm, you know, a quarter of a million dollars, so we had to try to figure out, like, what is going on and use this kind of approach to formulate, in essence, some hypotheses about why people may be leaving, and, for example, one of them was that they wanted to get, um, skills in using the new technology at the time that we were not offering. So, what it did, it allowed us to formulate some hypotheses around what was going on and then collect data to prove or disprove those hypotheses. So, we came up with, you know, um, some of the why's and did the drill-in activity, and then we could go out and actually collect data to say, yes, that's the case, or, no, it's not, so it was a really useful tool for that. How about you? What have you noticed with your clients?

>> Alice Waagen: Well, I used the five why's, um, oh, about six months ago with a leadership team. It's an organization, a business that, um, produces very complicated, manufactures and maintains very complicated, um, cancer treatment radiation equipment, and one of their biggest challenges was, um, bringing new hires up-to-speed. They would hire very knowledgeable and experienced engineers, but because the equipment was so proprietary, it took 12 to 18 months before they were fully trained, and because, obviously, using equipment like this has serious impact, if there's a mistake, um, they have to be very rigorous, and, so, they were trying to figure out how to shorten that initial training cycle, and, so, I put them into five different teams, um, in separate rooms, had them do five why's, and it was interesting, when they came back, we were able to prioritize, because a number of the same issues came up on the same teams, which seemed to say that was really a burning why that needed to be addressed. Oh, let's see what our audience has for us today. Um, Valerie mentions one very similar to our example, people, you know, nervous about process changes. That's a great thing to, before you throw the change out there, what could possibly be reasons for their resistance? Um, Michelle mentions poor compliance with the company initiative around employee self-selecting professional goals. Interesting. Interesting. So, compliance issues, great area to tap with five why's. Um, using new technology, Carol mentions that. Um, yeah, helping schools, helping staff understand the role of the SLP, Lori, good. Excellent idea. Mandy mentions reduced referrals for a service. Yeah, these are fabulous. New technology implementation, excellent. Excellent. Definitely, complicated problems, and to spend some time upfront digging down deep in them is a great idea. Kevin, I think you're going to take us now to look at where we might find opportunities to think strategically.

>> Kevin Nourse: Okay. So, our second lens for looking at strategic thinking is this idea of strategic opportunities. Um, it's really looking at, um, again, when we refer to strategic, we're thinking about, you know, moving the organization forward, so it's really those big picture opportunities and ideas. So, you might think about, I think this graphic really simplifies it a bit when it comes down to strategic opportunities. We're thinking about what does the organization need, and that could be what the organization knows it

needs or doesn't yet know, it's just it's a problem. Um, and then your passions, interests, and even your abilities or skills, and, so, what we're trying to do is to find ways that you can add value, um, and address the organizational needs, um, but it also advances your own passions and interests, and, to me, that's what I would consider real strategic career management. It's interesting, um, with all the, um, alumni and all the students we've worked with in the ASHA LDP program, each one of them brings a leadership project to the table to allow them to build some skills, and I would say pretty much every one I've seen is really very much this, is that they recognize a need that no one has addressed, bring that in, and are able to get a lot of progress on it, and it's amazing what we've seen come out of that program in terms of, um, how these, um, leadership projects, um, emerge as, um, real substantial components to helping LDP participants advance in their careers, because it gives them the ability to add more value. So, really, this is the concept of what we're trying to, um, to reinforce. So, therefore, we then think, well, what are some strategies we can use to find those strategic opportunities? Well, let me review a couple of these, and then, Alice, I'll have you chime in. Um, I'll touch upon a couple of them. First, I think probably the best place, or the first place to start is your organization's strategic plan. In other words, what we know is that people that do well as strategic thinkers, um, are able to relate their ideas to some of the key priorities for the organization.

So, for example, I know that ASHA's identified really critical priorities for, um, the association and members, whatnot, so the idea would be, to the extent you know what those are, such as building cultural competence for members, so that, again, the idea of coming up with a strategic idea, if you can't get support for it, it probably won't go very far, so I think it really goes hand-in-hand with getting that support. So, looking at your strategic plan, looking for where is the organization focused in the next few years, and with that, what ideas do you have about being able to address that. Um, and then, you know, presentations by senior leaders, um, you know, having opportunities to hear senior leaders speak about, basically, what their concerns are, what's keeping them awake at night, what are some of the emerging trends, that many times, those presentations will bring to life the strategic plan with specific leaders, and I know that a lot of folks that we've worked with, you know, use that as a really key way to identify it. Alice, anything stand out for you in terms of our strategies for finding these opportunities?

>> Alice Waagen: Well, I think one of the challenges in many professions, but I think even more particularly in the healthcare professions, is because so much of what people do day by day, that they need to do, that they're measured by, they're rewarded by, is very tactical work, that finding the opportunity to pick your head up, you know, out of the trenches and look ahead, it just doesn't happen, and yet it is so darned critical. Um, I like to, you know, periodically, through the year, just go into Google and put in, um, trends in business, trends in healthcare. There's a lot of writing out there that you can read, and I think it's so important, you know, top ten trends in our world, Kevin, top ten trends in Human Resources, and see what's coming up, and then say, huh, I wonder if any of that's going to affect my clients. That's where I think you can find some great



strategic thoughts or opportunities, but the other point, um, on our list here that I love, the last bullet, brainstorm with trusted colleagues, I mean, if it's possible for you, you know, to set a time, you know, once a month, you know, literally on your calendar to get, you know, possibly a lunch hour or an early morning coffee, get with some fellow professionals who you know like to look ahead, you know, and sit down and chat, what are you seeing, what are you seeing out there that you think is going to affect us. Um, I think it is so important, because if you don't see it coming, you can't put the plan in place to deal with it. Um, I see so many times in my walks of life, people that find their company has been sold, and they're like, well, where did that come from, and I'm thinking, well, you know, it's the trend of acquiring small organizations has been out there forever, you know, wouldn't you have sort of kept track of that, but they don't. So, I think this is a very important page, and, you know, I hope people take it to heart and think how can I actually hard-wire into my calendar time to do this, and resources to do it, whether I'm tapping the Internet, whether I'm, you know, talking to senior leaders, whether I've got a buddy group, you know, where we talk strategy, but to definitely, um, look for the opportunities that are out there. Yeah.

>> Kevin Nourse: That's great. Thanks, Alice. Um, you know, and I think, you know, to tip our hat to ASHA, which is just, you know, we work with a lot of associations, and I think ASHA's really ahead of the game in terms of, um, providing ways for, um, CSD professionals to share ideas and best practices, and I think, oftentimes, that's where the strategic opportunity comes up. You go to an ASHA conference, you hear some innovative new technologies with swallowing disorders, for example, and what that might mean in terms of being able to bring those back to your organization. Um, it's not as if you're inventing it for the first time, but bringing it in, the innovation is applying it, you know, within your organizational context. So, you know, ASHA is all about this very thing of looking at these trends, trying to get ahead of the game and how you might bring those into your specific organization. So, anyway, this is just a good summary of how do you identify those strategic opportunities, and I think the third one up, the unresolved issues or challenges faced by your patients, I think that's a big part of it. You know, many of you are, you know, day to day, you know, working with patients, and I think, so many times, you'll hear things associated with how the organization functions, or inefficiencies, or what are patients maybe struggling with in terms of administratively, and, to me, that, to me, is a really big source of it, and I think the challenge for organizational leaders, which is how to create an environment where, you know, frontline staff who are closest to our patients or clients can allow those ideas to bubble up and we do something with them.

Okay, so, at this point, we're going to do another reflective activity, and this time, think back to some of the big challenges or problems that you identified in our first activity, and when you think about, you know, in essence, what do you bring, so the idea was that organization needs combined with your talents and skills to resolve these issues, so, um, with that challenge, the challenge or problems that you guys identified, what unique skills or talents do you have that maybe you could use to move these ideas forward, and if you're listening to the recording, go ahead and hit the pause button and then rejoin us

when you've got some ideas captured. Um, Alice, what are your thoughts when you think about, um, I don't know, even in your own business in terms of with leadership development, how would you respond to this, um, reflection?

>> Alice Waagen: Well, this makes me think of a business leader I worked with a number of years ago. He was, well, he still is, I should say, a CEO of a financial services firm, and he was known for his ability to think strategically, and as one of his directory reports said, he had an uncanny ability to think three moves ahead on every decision, so every time there was a decision on the table and, um, a decision was proposed, he would be able to say, well, if that happens, then this, this, and this. He was very attuned to, um, or sensitive to that issue of unintended consequences, and, so, he, oftentimes, would halt a decision or reverse it based not on how it looked in the moment, but anticipating how it might look next week, month, or even next year, and I think that's sort of the, it's a very difficult skill to acquire, it's something that I think you can acquire and train yourself for, and it goes back to that, you know, constantly keeping your finger on the pulse of what's going on out there, you know, sort of going back to our original thought of the systems thinking, of saying, you know, in what context will this decision play out, and is that the right thing to do. So, that's sort of my thoughts on, um, unique talents or skills, you know, to use in strategic opportunities.

>> Kevin Nourse: It's a good example. Um, I'm reminded, it's interesting, um, with the research, um, both in dissertation and subsequent research on resiliency, um, I'm noticing, certainly within the healthcare profession, and it's certainly, I think, true for other professions, but, um, a lot of, there's a lot of burnout I'm seeing going on between both physicians, as well as, um, nurses in the, um, in the healthcare industry. In fact, I spoke with an oncologist last week who may engage me as his coach, really to revisit the idea, is he's gotten to the point where he's so burnt out, still loves, you know, the clinical work and helping patients, um, but there's somewhat of the administrative burdens, especially with, um, electronic health records, um, reimbursements, he had his own private practice, and is really struggling, um, around how does he kind of recover his passion, or how does he morph his practice to play more to his strengths that he's not so exhausted and burnt out. So, I didn't anticipate that when I did this research many years ago with my dissertation, and yet I'm noticing that this could be an interesting niche for me in my own coaching and leadership develop practice. So, let's look at some of the sharings in terms of, um, folks in the classroom. Carol speaks to her ability to project, like, the big picture implementation, impact and needs, which is huge. For someone to have a more global view of projects is critical. Um, Bob talks about connecting with other professionals, um, developing relationships with, um, governmental and other, which is huge, the ability to build bridges, I think is a really important skill. Mandy, natural problem-solver, enjoy critical thinking research. Right, so, it's, you know, perhaps taking the outcomes of the five why activity and getting into action, to formulate some hypotheses with that. Um, Michelle talks about strong relationships with healthcare partners, and, you know, we know that that's critical for, um, CSD professionals that are working in healthcare environments, to be part of the larger system and to be able to link in issues that you may face as an audiologist or a speech-language pathologist with a

larger healthcare context, to me is, boy, that's a huge opportunity to work. Yeah, anything that stands out for you, Alice, in terms of, um, some of the talents that we've got in the classroom?

>> Alice Waagen: Well, I think I see a lot of folks mentioning, um, you know, problem-solving, and I think that is so important. Um, Michelle notes up above, too, about the ability to look outside and, um, you know, I think that, again, it is something we don't do much, especially if we're very entrenched in a large organization, to look outside and say, gee, are there best practices out there, are there other ways to do this that others are tapping that we could use here. Yeah.

>> Kevin Nourse: Okay. Um, well, really nice review then of strategic opportunities, and I think, Alice, you'll, um, introduce our third module for today.

>> Alice Waagen: Yes, I certainly will. The SWOT analysis, this is not a new tool, it's been used in business planning for decades, um, but I will share with you that, um, even those of you who are listening to this recording or with us today who have seen SWOT, almost always when I've seen SWOT used in organizations, it's used very poorly, or not really tapping its value, so be patient with me as I go through how it is used, and then I'll share some of the pitfalls that you can do in doing a SWOT analysis that makes it less effective. So, SWOT stands for strengths, weaknesses, opportunities, and threats, as you can see in our diagram here. The value of this is, as we mentioned earlier, our three modes of thinking, when used together, really give us a rich analysis, and yet, oftentimes, we tend to lean more towards the type of thinking we're most comfortable with or we've used most often. The SWOT tool kind of forces us to use all of them, and in that case, by the time you're done, you get a very, very rich answer. So, if we look, for instance, at, um, this four-box, and we look at the upper quadrant, and we have strengths and weaknesses, those two boxes are asking us to look internally, whether I'm using this personally, on my own personal plan, or if I'm using it organizationally, I'm looking at my own entity, maybe I'm going to do this on my department, I'm looking internally, what are the strengths of my department, what are the weaknesses of my department. If we look at the lower hemisphere, um, we're looking externally, we're looking for external opportunities, external threats that could affect us.

So, already, what we're seeing here is, um, sort of a forced systems thinking. It's forcing us to look outside, at the world outside of ourselves or our unit to say what's going on. Now, if we look at in terms of our vertical quadrants, when I look at strengths and opportunities, when I'm focused on strengths and opportunities, I'm focused on a lot of positive things. You know, what's our value, what do we bring to the table, what's out there in the world we can tap, and studies have shown that when we're thinking in terms of positive thinking, or positive scenarios, we tend to open up, we tend to think very broad, we tend to think very creatively, so thinking about strengths and opportunities forces us into a creative thinking mode. Now, if we go to the other side and we're focusing on weaknesses and threats, I think you can see the opposite will happen. These are more negative thoughts. Oh, what do I not have that I need to get? What's

out there that could really cause me to fail? When we tend to think negatively, we tend to pull in. I like to think of the analogy, we circle the wagons, we pull in, and, so, what that triggers in us is much more of a critical thinking process. So, you can see that by having data, having elements in all four of these boxes, we are structuring our thought processes to hit all of the thinking modes, and therefore generate the most data possible.

All right, so, why does this work, or what are some ways it doesn't work? Well, I think a SWOT analysis is what I call a structured brainstorming tool, because in essence, what you're doing when you do this is literally brainstorming. You're just thinking and writing and thinking and writing, hopefully as quick as you can. When you do this with a group, um, everybody's shouting out things. Sometimes, people like to go box by box, let's first stop and look at all the strengths we can think of, then let's stop and look at all the weaknesses. Other times, people like to just, you know, hop around, shout something out, here's a threat, here's a strength, here's a weakness. No one right way to do it, it's just how you prefer to use the tool, but at the end of the day, what goes in all these boxes is simply data, that's it. Now, where I see challenges is I'll see organizations, you know, create a beautiful SWOT boxes here, and then say, we're done. Well, no, you're not done, it's simply data. You then need to step back and say how can we prioritize, how can we translate this data into a tactic going forward, or possibly even into a strategy, a long-term plan of action to achieve a result. So, I always like to do a SWOT analysis where I book maybe 50 percent of the time to generate this, and then 50 percent of the time to say now what are we going to do about it, because just generating this is not going to give you anything but raw data, so you might say, you know, step back and say, you know, wow, what's really interesting is, um, you know, our most filled out box of this right now is the threat box. Hopefully not, but if it is, then, okay, what can we do about that? Let's pick one or two of these and maybe take them and do a five why with it.

The other thing you can do with this is look to the left to mitigate the right. What do I mean by that? Are there opportunities out there that will counter the threats? Are there strengths in your toolkit that can be used to counter the weakness? If the answer is no, then I need to address that weakness. Again, if I'm doing this on my department, perhaps I'm going to, um, look for some new hires, you know, who have strengths in our weakness area. If it's in myself, perhaps I'm going to look to do some personal development to address some of these weak areas, or maybe I'll look to redesign my job so that what's a weakness for me is very little that I'm not going to do anymore, things like that. Kevin, that was kind of long-winded. Anything you can add to that?

>> Kevin Nourse: You know, it's, um, I find, based on all the work I've done with resiliency, um, which is really a coping process, this fits into it too. For example, we know that, um, at first glance, you know, many of the threats we identify, um, you know, send us into, can send us into a bit of a tail-spin, and that, really, part of thinking critically about our threats, simply naming our fears, you might think about that, we know that resilient people are able to name their fears or write them down, and then they get

perspective on them, and what I found is that using a tool like this SWOT analysis allows us, many times, to shift threats. Once we've had a chance to sit with it, reflect on it, enlist others to think it through, it often can move a threat really over to the opportunity column. So, I find that, you know, in terms of our psychological functioning and how we maintain resilience in a tumultuous environment, that many times, you know, the SWOT analysis tool gives us that level of perspective, and when we have perspective, we're able to shift it from scary threat to, hey, this is challenge, and I can manage challenges, so it really, I think, fits into it from that perspective too.

>> Alice Waagen: That's a great observation. Yeah, and, you know, again, I think the nice thing about this four boxes is, you know, if you're having a bad day and your weakness and threat thing is really heavily inked, then it forces you to look to the other side. No, there's some good stuff out there, and we need to tap it. A couple other thoughts, again, on using this to where it makes sense. If you are using this with a group of people, just like any brainstorming session, you want to make sure everyone's voice is heard. You don't want one person dominating. What I do oftentimes in that case is I have people, um, take 5 minutes before we start as a group and put their own private thoughts down and then jump in and share them. That way, if people need a little bit more reflective time, or if they're a little less, um, assertive, you know, they've got it documented, and then we can go around and make sure everybody's voice is heard. The other thing that I think can be, um, a challenge with this is when people, you know, put things out there that are kind of vague and not well-understood, or, you know, people will say, well, it can be both an opportunity and a threat.

The classic one for that is technology. Technology can be an opportunity, it can help, or it can be a threat. In that case, I stop and say, well, we can pencil it down the middle line, but I want you to be more specific. In what ways is it a threat? In what way is it a problem for you? In what ways does it open up opportunities? And that way, you know, again, we get a level of specificity to where you end up with data that's useful and not just kind of vague and meaningless. So, you know, again, it's a great tool when used well. Now, let's start and look at it, um, as an example of using it personally. I think SWOT is a fabulous tool to use individually. I try to use it, you know, at least once a year in my own planning. Um, you know, it's a great tool to generate input, for instance, for a personal development plan, or a long-range career plan. So, you see in the examples up here this fictitious person, you know, said their strengths, you know, got lots of certifications, have a great relationship with their manager, um, has good experience in leadership on the volunteer platform, and is pursuing an advanced degree, but they're plagued with, you know, fear of conflict, um, they're nervous delivering, and they feel that they, that their youthful appearance is holding them back. Um, I think it's a great, um, you know, self-disclosure, to come up with things like this. Um, and then you can see the opportunities and threats at the bottom. So, even if you look at this as a, sort of a sample, um, look at the ways that a person could now look to leverage, excuse me, some of the things on the positive side to affect some of the things on the negative side.

Um, so, for instance, you know, this person has a strong relationship with their manager, um, but they've lost, um, a major advocate in their, in the leadership team, so perhaps they can have conversations with their manager about who else on the leadership team would be a good mentor or a good, um, supporter or advocate. So, we're taking stuff from the left, so to speak, and use it for the right. Um, you know, definitely, the fact that this person has done a lot of volunteer leadership, they can use that to perhaps counter their youthful appearance, to cite their experience in leadership, you know, when they're in conversations where they feel they might be being discounted or not, you know, being attended to because of the way they look. Kevin, any thoughts you have on looking at a SWOT analysis for personal growth?

>> Kevin Nourse: No, I think it's, like you, I use this, um, you know, at least once a year in terms of myself, my career, and my own professional practice, and, um, you know, many times, I'll use it, again, in conversations with others that know me, to say, you know, what do you see are my strengths and weaknesses, so I use it as kind of an inclusive process, because it's both, you know, exciting, um, and affirming, but also, um, challenging, you know, to be open to hearing weaknesses. Um, I think another part of that is, you know, for me, in my professional practice, what do I see other, um, executive coaches doing better than me, um, and once I can get over my, you know, having to face the harsh reality, it's actually a real gift to be able to discover that. So, as you said earlier, I think, really, the key is do the SWOT analysis, but use it to drive action, because, ultimately, that's the test. We can think strategically about our careers, our organizations, our functions, but again, if all we do is do a SWOT analysis but it doesn't really drive any kind of action-taking, then it's limited utility, so I think that's really the challenge.

>> Alice Waagen: You know, that is a great tip, is, you know, plan to do a personal SWOT analysis, put a date on your calendar, and then, prior to that, go externally and ask people's input on their perceptions of strengths and weaknesses, and I know people don't like that word, weakness, but, you know, I think a great question to ask others, um, is, you know, what do you see me do that makes me successful, what do you see me do that you think might be holding me back. That way, when you use that see me do phrase, you get behavioral feedback, not just, oh, you're a great person, you're fun to be around. I mean, that's great, but that's not as specific. Again, going back to my point earlier, the more specific, the less vague, the more actionable the issues will be on this. Um, you know, yeah, I just had a thought, lost it, and regained it. Um, the other way, one last way to use this in terms of your future is you can do a SWOT analysis today, but then ask yourself the question, where do I want to be in five years? What kind of a position? What kind of an organization? What kind of work do I want to do? And almost do it with a future leaning. What are my strengths today that would help me achieve that? What do I lack today that I need to address to get to that desired future state? What are opportunities that can move me in that direction? And what are the big rocks in the road external to me that could get in the way? And that is a great way to, you know, you can use it as in a current state, but to use it to generate almost a gap analysis

of where you want to be in the future, it's kind of a strategic, um, double whammy, is that a good way to put it, Kevin?

>> Kevin Nourse: Yeah, that sounds right.

>> Alice Waagen: Okay. I think you're going to take us into our last reflection now.

>> Kevin Nourse: That's right. So, now that we've introduced the SWOT analysis tool, um, we're going to start you on this, knowing that it needs much more time and attention than we can give in the webinar, but what I would invite you to do now is, um, to capture one strength, one weakness, one opportunity, and one threat that you might find, and, um, for those in the classroom, if you want to share with us what is one opportunity and one threat, so you'll just share that for purposes of, um, of our interactive activity. So, um, for those on the audio recording, if you want to hit the pause button right now and take some time and capture some ideas on your SWOT analysis, and then when you're ready to resume, hit the play button and join us. So, um, anyway, so, in the classroom, if you want to share what is one opportunity, one threat, um, let's see what you come up with. What stands out for you, Alice? Again, thinking about your major clients and what are some of the opportunities and threats they're faced with.

>> Alice Waagen: Well, I can actually even use this personally. Um, you know, many years ago, when most of my business was delivering workshops and seminars in organizations, you know, in a classroom mode, a real threat out there was digital technology. In fact, so many times, I was told by people, oh, you know, you're not going to be needed anymore, we're going to do all this stuff online, and, so, I felt that, you know, emerging technology was a real threat to my personal face-to-face delivery of my business. Well, as we are doing today, now, the technology has gotten to the point where virtual webinars are so successful, it's really a growth opportunity, and, so, I think that's another thing. Sometimes, the threats can become opportunities, even despite ourselves, just, um, just because of the world we're in today.

>> Kevin Nourse: That's great, Alice. Thank you. So, let's look at the classroom and see what some of the participants have shared. Um, for Puja, to look at the concept of diversity, which could be a huge opportunity to develop, um, you know, especially how the CSD field, the profession is changing and becoming more diverse. Um, Bob speaks about the threat of changes in federal state laws, and I think, Bob, what I've heard from a lot of my executive clients is the fact that, um, we don't know how those laws are going to change, so the ones that have changed, we know, but just as important, and sometimes even more threatening, is what we don't know and how we're going to handle it given that we don't know that. Um, Michelle points out, um, the opportunity to develop and grow a business line that you're involved with, Michelle, which is an awesome opportunity, but you're right, so, the threat of balancing the regulatory environment with new regulations and limited time, that's right. So, that's, I think, part of, um, what is often threatening, which is we have little time to prepare, um, associated with that. Um, let's see, Valerie points out a threat, um, changes keep happening, sometimes so fast, we barely adopt one before something else changes, and, so, you know, it makes me think,

Valerie, the opportunity there to develop, perhaps, greater skills at, um, navigating change and becoming more, um, strategic thinkers and more resilient, which is usually the developmental imperative I'm finding with a lot of organizations. So, some really good, um, sharings from, um, participants in the classroom, so we would invite you to continue this dialogue after the webinar and use this to drive action and reflection in terms of insights on your career and next steps. So, I think, Alice, you're going to take it from here with our key points summary.

>> Alice Waagen: Yes. Well, we started today by talking about the three modes of thinking, and I think, definitely, look to using all of them, especially when you're facing a critical decision or issue. Strategic thinking is an excellent tool to look for career opportunities, both within your organization, and also in the volunteer role, and lastly, the SWOT analysis is a great structured way to make sure that you are doing all forms of thinking when facing a sticky issue. All right, what's next? It should come as no surprise, we're going to challenge you to complete a SWOT analysis on your own career and share it with a mentor, a trusted colleague, get their input. Um, interview a senior leader to hear more about how they're using strategic thinking, and lastly, um, explore in more depth one of the opportunities that you have already identified in this webinar. So, with that, I'd like to turn the mic over to Andrea, so, wrap us up, Andrea.

>> Andrea Falzarano: Thank you, Kevin and Alice, and thank you, everyone, for joining us. This webinar is part of a series in ASHA's Leadership Academy. For more information, including information on continuing education credits, visit [www.ASHA.org](http://www.ASHA.org) and search Leadership Academy. We also encourage you to join the ASHA Community, focused on leadership topics. Go to [ASHA.org](http://ASHA.org) and search Leadership Academy. You will find a link to the online community on this page. This concludes the ASHA Leadership Academy webinar on Strategic Thinking. Good-bye from the ASHA National Office.

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