



HUMAN RESOURCES  
TEXAS WOMAN'S UNIVERSITY

## Planning Strategically: Skill Overview

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### Skill Introduction (Step 1)

**Strategic planning** consists of bringing a vision to life through the coordination of specific activities, mindsets, and resources. Put simply, the skill of planning strategically is built out of our strategic actions and thinking. Being strategic is often viewed by many as being “above” the supervisor’s role, like it can only take place within boardrooms utilizing fancy charts and forecasting tools.

Strategy does not live in PowerPoints or webpages, but rather the decisions we make, how we solve problems, and the ways in which we guide our teams through everyday work. Operations and strategy are not mutually exclusive, they exist in a feedback loop. What happens in the office and the classroom informs what needs to happen next on a larger scale.

Many supervisors believe their job is to focus on tasks and teams, leaving the big picture for someone else to create; however, **the big picture is comprised of day-to-day moments**. When a supervisor starts to see patterns, ask better questions, or shift how their team addresses an issue due to change - *that is strategy in action*.

Strategic supervisors do not need fancy titles or full control over a plan to be effective. They derive their impact through a clear sense of purpose and the ability to connect the dots. A few signs of a strategic supervisor in action, include:

- Understanding how their team’s projects support broader goals
- Recognizing patterns, gaps, or friction within daily work
- Asking ‘how does this fit’ or ‘what’s driving this’ before jumping into action
- Knowing enough about other departments to understand impact and alignment
- Balancing data and emotional intelligence when making decisions
- Articulating purpose, not just process, to their reports and stakeholders

There are some common roadblocks that supervisors who desire a more strategic role often face. Some supervisors feel disconnected from why an organization focuses on certain goals.

Others may not have experience contemplating how roles and tasks connect across departments or functional areas within an organization. Additionally, some may believe that strategy is only fit for those in upper leadership or that if the work is getting done, then there is no need to step back and think differently.

Real strategy is not **extra** work, it is **quality** work - rooted in alignment, efficiency, and purpose.

Most strategic supervisors are the ones others look to as an example. Their teams get results, not just because they work hard or well together but because they work with intention. These supervisors know their stuff, understand their people, and can conceptualize how both of these support the overarching mission of the institution.

## Skill Development (Step 2)

It can be challenging to assess where we might fall in any given skill, and the types of practice or behaviors we should seek in order to improve our ability to practice each skill. I have provided a rubric that assigns descriptions and common behaviors or outcomes for each skill level below.

<i><b>Skill Level</b></i>	<i><b>Description</b></i>	<i><b>Behaviors and Indicators</b></i>
<i><b>Inexperienced</b></i>	Operates reactively with minimal long-term planning or awareness of organizational strategy.	<ul style="list-style-type: none"><li>- Focuses on immediate tasks without connecting them to broader goals</li><li>- Struggles to anticipate future needs or implications</li><li>- Waits for direction rather than identifying opportunities</li><li>- Avoids decision-making when uncertainty is involved</li></ul>
<i><b>Competent</b></i>	Begins to connect day-to-day responsibilities with strategic priorities and contributes ideas aligned with broader goals.	<ul style="list-style-type: none"><li>- Aligns team goals with department or unit objectives</li><li>- Participates in planning conversations with increasing confidence</li><li>- Considers impact of decisions beyond the short term</li><li>- Recognizes trends and adjusts tactics accordingly</li></ul>

**Proficient**

Thinks and acts strategically, consistently applying foresight, data, and big-picture thinking to team decisions.

- Develops goals and plans that support broader institutional strategies
- Identifies risks and opportunities early and adjusts plans with agility
- Encourages team members to think about long-term impact
- Communicates strategic priorities clearly and consistently

**Expert**

Leads with strategic intent, shaping priorities, influencing direction, and fostering a culture of forward-thinking and alignment.

- Shapes team and cross-functional strategies to support institutional direction
- Coaches others in strategic thinking and decision-making
- Builds systems and routines that support ongoing planning and prioritization
- Advocates for innovation and change based on both evidence and insights

## **LinkedIn Learning Course & Prompts (Step 3)**

For this session, we will be taking the course [Coaching Your Team to Think and Act Strategically](#) by Nina Bowman (55 minutes).

Using your TWU LinkedIn Learning account, you may access both of these courses. Please view instructions for first-time sign-in using [this TWU Knowledge Base article](#). As you watch this video, I recommend considering the following questions:

1. What is one strategy or concept from the course that stood out to you, and why do you think it resonated?
2. How might you apply what you learned to your current role, team management, or interactions with others?

3. Did anything challenge an existing perspective or approach to thinking and acting strategically? If so, how?
4. What opportunities do you see for us as an institution to use these concepts to improve our work and meet our goals?

## **Exercises and Supplemental Resources (Step 4)**

These exercises are optional, but recommended, as low-stakes opportunities to synthesize the material and provide an avenue for reflection and practice. The exercises should be done after reviewing the skill introduction section, skill development section, and answering the prompts for the course above.

### **Reflection Exercise:**

Nina Bowman states that mindset matters when it comes to coaching our teams to think strategically. She encourages us to get in touch with our underlying beliefs and preconceived notions that may inform and unintentionally influence how we facilitate strategic behavior in others. Ask yourself these questions to assess your mindset around strategic planning:

#### **1) What are my beliefs around strategic work and who should participate in it?**

**Example:** “I used to think strategy was only for senior leaders, so I didn’t involve my team. Once I saw that strategic thinking can happen at any level, I started coaching employees to connect their ideas to broader goals.”

#### **2) How have my prior work experiences shaped my thinking about strategic work?**

**Example:** “My early jobs kept strategy behind closed doors, so I saw it as off-limits. That mindset limited how I coached others. Now, I encourage employees to think systemically and share insights, no matter their role.”

#### **3) How do I define strategic behavior?**

**Example:** “I used to think strategy meant big-picture planning. Now, I see it as making thoughtful choices that align with long-term goals. That shift helps me coach employees to find strategic opportunities in their day-to-day work.”

### **Practice Exercise:**

**Goal:** Practice connecting daily tasks to broader goals and spotting small improvements.

#### **1. Choose a Routine Task**

Pick one task you or your team does often.

#### **2. Zoom Out – Reflect Strategically**

Ask yourself:

- What bigger goal does this support?
- Is it still the best way to do it?
- What would happen if we stopped?

→ Jot down 2–3 key thoughts.

### **3. Zoom In – Take One Action**

- What's one small change you can make to the task so it is more effective?
- What change would make this task more aligned with team or department goals?
- Would it be beneficial to involve others from your area in this initiative or task?

#### **Optional:**

Try this with a team member in your next one-on-one to build their strategic thinking too.

### **Supplemental Resources:**

If this topic is interesting to you, and you wish to learn more, consider one of these resources for furthering learning:

- Watch this LinkedIn Learning course on [Leading Strategically](#) by Eric Zackrison (55 minutes).
- Read this [article](#) on different strategic planning frameworks from Atlassian.
- Review the [website](#) for the Society for College and University Planning, or SCUP, a higher education-focused strategic planning association.
- Listen to a “[OnStrategy](#)” how-to video for step-by-step information on developing different pieces of a strategic action plan.