NotesOn: IT Management – Strategic vs. Tactical Roles

Introduction (V1.0):

This post is the result of a fascinating discussion with an IT Executive on the subject of Strategic versus Tactical responsibilities for different roles. While the subject center is IT, the ratios described herein apply to any type of company that I can think of. The "who does which" ratio, who is strategic versus who is tactical, isn’t at all one way or the other, i.e. execs are not just Strategic and technical folks are not just Tactical. It varies by role. The ratio does vary by role but in ways you might not suspect. Understanding the ratio and applying it will help build a top flight IT organization (or any organization).

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Background:

If you have ever skimmed my “About” page you will know that I’ve held quite a number of IT roles during my career (plus a number that were non-IT). For some time now I have recognized that some folks, particularly some executives have a black-is-black-white-is-white point of view when it comes to strategic and tactical responsibilities and skills. And also that other execs who worked their way up “from the ranks” have forgotten what “lower” was like and what it takes to “do” lower.

All of which came into sharp focus during my aforementioned fascinating conversation. The executive in question was locked in on a particular manager who they deemed wasn’t strategic enough, one who, they thought, was spending too much time being tactical. I knew at once that this executive had either forgotten, or never knew, about the strategic-tactical ratio and how it can and must flex depending on the situations the individuals in each role are facing: particularly true for managers.

You are the beneficiary of that conversation as we are going to explore this ratio, taking at look at what you may have “known” or “known about” but never realized and understood to the degree necessary to be more successful in your career and organization; IT or otherwise.
**The Strategic-Tactical Ratio Diagram**

Before we begin the discussion allow me to present the following graphic as, sometimes, pictures are indeed worth a thousand words. I tried to explain this ratio to the executive in question but I’m pretty sure they didn’t get it. Perhaps, when they see it in picture form they will. Try it on for size, study it and then we’ll chat:

![Strategic-Tactical Ratio Diagram](image)

So. Do these ratios seem about right to you? Or are you not quite sure. Maybe you have run into situations where there are wild (perhaps even psychotic) swings in them (ex: a senior executive who goes 20%/80% on you) but, unless it is a small company where everyone does everything, such out-of-kilter oscillations should be the exceptions and not the rules for they are detrimental.

How did I come up with these? Experience. I’ve garnered these ratios from years of observing, listening and living them so even if you are in doubt right now keep them in mind as you move forward in your career. You might be surprised at their accuracy.

Did you notice that at the top of the Left Side you have the C-Level Executives (CEO, CFO, CIO …)? Heavily, heavily strategic. And that at the bottom of the Right Side are the junior role, the team members just getting started in their careers? Heavily, heavily tactical. Did you happen to remark that neither is 100%? This is because I have yet to find any position in any company at any level that is ever 100% strategic or ever 100% tactical. And that is as it should be.
Left Side: A Lesson Long Since Learned

I learned long ago that any executive who isn’t willing to roll up his or her sleeves isn’t much of an executive. Dilettante, yes. True executive, no. Going tactical means getting ones hands dirty, getting grease and grime under ones fingernails.

Anyone in an organization, no matter what their position, who is not willing to do so, is not worth much to the organization. As a rule, the position above should know how to do the tasks, should know how to take on the responsibilities of the positions one level below; preferably more than one. This is why “working one’s way up” is so very valuable to the organization, and to the individual.

Take a closer look at the top of the left side, the Strategic Side. There is a “rule of thumb” ratio for the C-Level too. If they are to be any good to the company, they need to be able to dive down a level or two, on an as needed basis, to “see what’s what” or “help sort out a mess” or “find out what really happened”. The best CEOs, in my humble opinion are those who have worked their way up the ladder and know “the ropes” of their company. One of the very best I’ve ever worked for was Lod Cook, the now years ago retired CEO of ARCO. Starting out as an engineer he literally worked his way up from the oil fields and so knew the oil business. To make a point of it, this graphic holds true, consistently true, for all levels on the left.

Management Hint

If you find you have someone in the executive stack who is constantly more tactical, going down too far too often ... without good reason ... you have a problem. Why? Because they aren’t building up their team, they aren’t mentoring and teaching and guiding, they aren’t setting long and longer term directions or looking for the speed bumps (i.e. doing their risk management due diligence). Each level has their reason for existence. If they are doing another’s more than their own then they are creating a vacuum in the organizational structure that could weaken the organization – if it doesn’t, the position may not be necessary.

Right Side: Tactical Comes First

On the Right Side of the graphic, the ratio inverts. Here, the primary focus of the majority of the roles must be Tactical. With one exception, sleeves are (as a general rule) always rolled up and only turned down on occasion. The more junior the position the more the cuffs are up, the dirtier the hands and nails should be – figuratively speaking. Except not always figuratively. I’ve run my share of electrical and computer cable through walls, in attics, under floors and so forth and crawled under desks and counters to “hook things up”. I’ve hauled in and racked and stacked more servers than I can remember and stayed up for days at a time until “things” were right again. I’m hardly the exception in this regard in the IT world so, yes, even IT gets its hands literally dirty. You want to build an IT organization that is successful be willing to get sweaty.

Management Hint

As a manager, you want your technical/operational team members to think strategically, when they have time. You need them to obtain knowledge of the areas outside their own immediate zone of responsibility, to obtain a breadth of experience. This is a good thing for you and them to work on.
You can and should mentor them, you can and should be willing to listen to them and entertain their ideas. But. Be leery of taking action on their latest strategic brainstorm as these rarely have taken into account all of the data, all of the points of view, all of the stakeholders, all of the possible outcomes including potential unintended consequences.

The lesson is that if you have a junior person (to pick on newbies for a moment) in a junior role who is consistently trying to go strategic on you, rather than staying tactical and doing their job ... you have a problem. They may think otherwise but they do not know enough, yet, to make sound strategic decisions.

**A Curious Thing About Managers**

Did you notice something “curious” on the diagram? The exception I mentioned above? If not, go and look.

Notice that the Manager role is on both the Left and the Right side?

They are at the bottom of the management stack.

And.

They are at the top of the operational (technical) stack.

For a reason.

Managers are the bridge between the two “worlds”. So they must be flexible. They must be capable of being both strategic and tactical. Sometimes within moments of each other.

When things are “going to heck in a hand-basket”, when their operational/technical team is having “issues”, when their projects are going sideways, they must, must, must roll up their sleeves and dive in. If a manager is not willing to do so, they are utterly useless. Completely useless. To anyone. Including themselves.

And. They must stay tactical until “it begins to come right”, whatever “it” is. Using their experience and know-how their number one job is to get “it” back on track. And if there is no track they need to make sure one is built, building it themselves if needed as a demonstration to their team members of how it is done.

Then.

When the dust settles. When “things” begin to smooth out. When Life and Production return to normal.

They swing back the other way and try to go more strategic and less tactical. Or at least balance them out.

Here’s a rule that often gets missed by executives:

*More than any other role, a Manager must be able to rapidly swing either way on the strategic-tactical ratio.*

When everything is sunshine-and-puppy-dogs they’d better be looking into the future and preparing for the unknowns, and working on contingency plans, and reinforcing their team to make them stronger, and
developing their succession strategy(s), and polishing up the budgets for the next year, and sitting down with their business partners and doing long range views, etc. Under these conditions, they could be running on a 70%/30% ratio, or even higher at times.

On the other hand:

When most everything is black-and-bleak and the walls are about to cave in, when the troops are panicking and about to bolt, when the business users are beating on the door with torches and pitch-forks in hand ... that manager had darned well better be tactical. Even to pulling their boss down several percentage points if needed on an all-hands-on-deck basis. In such an event the ratio flips. Could be 30%/70% or 20%/80% or, heaven forbid if the roof and foundation are about to go as well, 5%/95%.

For the duration of the “incident” they must and do stay majorly tactical.

The smart executive supports them and backs them up and covers the strategic side as much as they are able. And then pats their manager on the back when they and the team have recovered “things” back to normal.

The smart executive also publicly acknowledges and bonuses the manager, too. The team is a reflection of the manager, if they have had them for a while, and the good manager always puts the focus on the team not on themselves (so rarely draws the kudos).

By the way, the military equivalent of the Manager role is the Sergeant or Master Chief or Chief Of The Boat, etc. Good officers know the value of these seasoned veterans and support and promote them accordingly.

One more thing. An experienced manager is willing and able to go tactical but always, always, always has an eye on the strategic impact of their decisions. Often they don’t think of their decision process as containing strategic elements but if an unbiased observer takes a closer look they will find it is so.

Unfortunately, this is what bosses who have been away from their own prior manager roles for a while, or a long time, sometimes forget: particularly when considering a manager for a promotion. “But you aren’t strategic enough for the role” is often a demonstration of the executive’s lack of remembrance that a good manager is always both.

Summary:

Does this make sense, more sense, now? Was there an “ahh-hah!” moment while reading? Understanding that the Strategic-Tactical Ratio is dynamic with an approximate workable range for each class of positions can go a long ways towards improving the success level of an (IT) organization. If you are just starting out your career, understanding that good managers swing either way at the drop of a staple is an invaluable insight.

Hope this helps,

DP Harshman

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