

# Embracing Strategy as Learning

## Examine, empathize, explore, exchange: The Path to Becoming a 21st Century Association



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It is the start of a new year, and we watch with a combination of amazement and apprehension as powerful forces of societal transformation continue to reshape every field of human endeavor. We know that new and even bigger waves of profound reinvention are yet to come. These developments are not accidental, and the volatile and uncertain operating environment they combine to create for all legacy

organizations, including associations, will not be going away any time soon. Association decision-makers must confront these uncomfortable truths and, once and for all, abandon stale planning-centric approaches to strategy better suited to a world that no longer exists. In their place, associations must implement the next practices of strategy as a process of learning, co-created with and directed by the stakeholder cohorts with which associations wish to establish meaningful relationships in the years ahead.

Embracing strategy as learning begins with associations focusing their attention on a challenging yet essential conversational pathway. This approach situates the past in its proper context and listens to, learns from and collaborates with a full range of internal and external stakeholders whose personal and professional choices will be a major factor in determining the future thriving of associations. There are four core steps in this conversational pathway, which follow.

**EXAMINE:** What beliefs/ways of doing business are preventing your association from thriving in the years ahead?

Associations will find it difficult to learn what they don't know (much less what they don't know they don't know) if they are unable to examine the orthodox beliefs that may be holding them back. Orthodox beliefs are deep-

seated and largely invisible assumptions, inculcated into legacy organizations over time, that influence the way staff and voluntary contributors think about their work, make decisions and take action (or not). For the most part, orthodox beliefs are the noise of the past, an insidious form of inertia that must be overcome to make new thinking possible. Questioning orthodoxy is a potent and necessary form of "unlearning" that makes strategy a truly learning-oriented process.

In addition to orthodoxy, associations must closely examine their existing business models to build a shared understanding of how those models function today and how they will need to adapt and shift tomorrow. A business model is the rationale of how an organization creates, delivers and captures value. The full and effective integration of these three logics, i.e., value creation, value delivery and value capture, is what makes it possible for business models (and organizations) to thrive. Through stakeholder conversations, associations can develop fresh ideas and insights to facilitate the move away from membership-centric business models and toward business models that make stakeholder value creation their primary focus.

**EMPATHIZE:** What short-term problems, intermediate-term needs and long-term outcomes must association stakeholders address to thrive in the years ahead?

The second step in the conversational pathway concentrates on developing a richly empathic understanding of how stakeholders are working toward realizing their full potential. In their personal and professional lives, stakeholders will confront issues, challenges and opportunities that emerge along overlapping timeframes. Even as they seek to solve short-term problems (12 months and less), they will strive to meet intermediate-term needs (24-48

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months) and work to achieve long-term outcomes (60 months and beyond). By identifying “value pathways” that connect problems to needs to outcomes, associations can build more lasting and value-based relationships with both current and future stakeholders.

At this step in the strategy as learning process, strategy conversation contributors collaborate to develop specific and meaningful stakeholder “personas.” Such personas are real-world representations (with fictionalized details) of specific individuals whose problems, needs and outcomes usefully represent those of broader stakeholder networks. Personas are a vital tool for putting stakeholders first and keeping subsequent conversations focused on how associations can provide stakeholders with an actual experience of value in all future interactions.

**EXPLORE: What distinctive solutions, services and support can your association co-create with its stakeholders to help them (the stakeholders) thrive in the years ahead?**

Working with stakeholder personas, the next step in the conversational pathway explores the various forms of value that associations can co-create with current and future stakeholders. In order to build long-term stakeholder relationships, associations must have value offers on which they can deliver in each of the three timeframes. Many associations think only about addressing the pain of their

stakeholders’ short-term problems. While this approach may be conventional wisdom for membership-centric business models, it is an unhelpful orthodox belief for value-centric business models.

For stakeholders, an increasingly digital world has transformed value into a continuous flow, in part because there are seemingly endless options for accessing different forms of value through various content, learning, social and other platforms, as well as through their own network relationships. And yet while stakeholders enjoy the benefits of abundance in many areas, they also must manage the limits of certain intangible and finite resources, including their time, energy and attention. Associations can support their stakeholders by developing platforms that create meaningful value flows for solving problems, meeting needs and achieving outcomes, while also maximizing the impact and conserving the supply of their most precious resources.

**EXCHANGE: What assets/resources can association stakeholders and their networks contribute to value creation?**

The final step in the pathway is identifying how strategy conversation contributors, as well as their personal and professional networks, can collaborate with associations on co-creating value for themselves and their peers. At the heart of this phase is the idea of exchange. Associations often expect contribu-

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tors to part with their intellectual capital and other assets for the exclusive benefit of the organization and without any meaningful value offered in return. To build strong value flows, however, collaboration and co-creation must benefit both associations and stakeholder networks.

The assets and resources residing within stakeholder networks, including technical expertise, social capital and even financial resources, are typically hidden from view and unknown to those outside of these networks. Associations seeking access to these resources must be willing to negotiate for it by offering relationships other than membership. Membership cannot be the default position since that offer may be inappropriate for many network participants and may not resonate with others. By identifying and agreeing to mutually beneficial terms for collaboration within the structure of the strategy-making process itself, associations can accelerate the pace of work and begin trying out new approaches without delay.

### And Finally, **EXPERIMENTATION**

Following the four steps of the strategy as learning conversational pathway will bring associations to the next “E” in the process: experimentation. Strategy lives in doing, not in documents. The immediate opportunity for associations is to design and conduct small-scale experiments, including mockups,

prototypes and service tests, to evaluate the upside potential and downside risks of emerging ideas and concepts. This learning is critical to future decision-making, and working directly with strategy conversation contributors on experimentation will create a more effective and generative process, build confidence among all stakeholders and ensure that the richness of learning sustains the momentum for continued experimentation.

### An Ongoing Process

To make this process function well both in the short run and over time, associations need to take three critical actions. First, boards need to entrust strategy as learning to their potential successors, i.e., the younger and more diverse demographic cohorts their associations are working hard to attract. While certain to be a controversial choice, there are many reasons why it is the right choice, including the need for boards to focus their attention on the duty of foresight, as well as the chance to have strategy crafted by the universe of contributors whose lives and careers will be most deeply affected by societal transformation.

Second, associations must fully capitalize on the power of technology to support distributed conversation, collaboration and experimentation. Strategy as learning is about bringing together a variety of voices and listening with intention to diverse perspectives. Well-designed technologies can nurture that

inclusion and amplify its impact.

Finally, associations need to support strategy as learning as an ongoing process for building organizational capacity. In strategy as learning, decision-making and action take place within an 18-36 month always-shifting window, not a fixed time period on the calendar, as is the case in planning. Since learning is always happening, strategy as learning must happen at all times as well, and associations need to invest their resources accordingly.

More than any other capability, it will be the capacity for learning (as well as unlearning and relearning) that will determine which individuals, organizations and networks will be able to thrive in a world experiencing relentless transformation. Strategy as learning is an excellent opportunity for associations to discard unhelpful orthodox beliefs and replace them with more forward-looking ways of thinking and acting, develop enduring and high-impact relationships with stakeholders who

might otherwise never give their organizations a second thought, and gain access to surprising sources of imagination and unexpected resources for innovation. In short, it is the right approach for associations interested in taking their work to “the next level” and becoming truly 21st century organizations. Now is the time to act on it. 

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