



Online Only

ROBERT SCHMIDLE

Can Strategy be taught?

A comment

Abstract

The purpose of teaching strategy is to develop designers not craftsman. The craftsman's skills can be taught like the tactics to which Lawrence referred. The designer, on the other hand requires an interdisciplinary education. That education is a holistic process, which is conducted horizontally, not vertically and begins with incorporating the tenets of design thinking. Among the more relevant of those tenets are: honestly confronting the facts, breaking through the noise to discover what is truly important and scaling for impact at an appropriate time and place.

Table of contents

	Page
Abstract	1
Table of contents	2
Can Strategy be taught?	3

In the Seven Pillars of Wisdom T.E Lawrence held, like Clausewitz before him, that wars were fundamentally irrational activities and any attempt to understand what caused them or how to fight them needed to pay homage to the reflexive practices and beliefs of the warring parties. This is not to say that there was not a place for calculations in war, e.g. in matters of logistics or the tactical application of artillery.

Rather and most importantly, Lawrence proposed that those calculations were not the key factor in deciding the outcome of a war.

Famously Lawrence wrote that “Nine-tenths of tactics were certain enough to be teachable in schools; but the irrational tenth was like the kingfisher flashing across the pool, and in it lay the test of generals”. The test of generals, which very few but the greatest would pass, was their ability to understand and tap the true source of power—the irrational tenth. It is the seemingly irrational decision of a great commander going against the conventional wisdom of the day that confounds his enemy while inspiring his own forces to victory.

Lawrence explains further about the essence of the irrational tenth “It could be ensued by instinct (sharpened by thought practicing the stroke) until at the crisis it came naturally, a reflex.” Lawrence’s perspective on irrationality, far from seeing it as something to be avoided, was that it should be understood as providing a horizon of possibilities not evident otherwise. Of note, the irrational tenth was something that could be developed by study and critical thinking and was not something that came merely from experience.

The focus of his strategy was on using ‘irregular’ as opposed to regular or conventional uniform-wearing forces. Lawrence believed that it was important to think of war, at least his war, in terms of asymmetric presentations by his irregular forces to the regular forces of the Turks. He goes so far as to say “In a real sense maximum disorder was our equilibrium.” Disorder was for Lawrence not something to be avoided or tamed. Rather, it was the natural order of his war; it was in fact the state of equilibrium.

Throughout his campaign on the Arabian Peninsula Lawrence continued to redefine the Western way of war in terms of his new way of war. He fundamentally sought to embrace uncertainty and develop his strategy of resistance, informed by an understanding of the irrational in human decision-making. He took issue with the traditional model of warfare and the ensuing strategies that were employed by both sides on the Western Front in France in 1916. In his mind, the protagonists were treating war as if it were one large Newtonian formula to be solved by calculation.

Lawrence, on the other hand saw his war against the Turks not as a mathematical calculation to be solved by arithmetic. Instead, he believed it to be a fluid and chaotic enterprise, unique to its historical context, to be exploited and made evident in the guise of the 'irrational tenth.'

When we think about the pedagogical methods used to teach strategy it is important to begin by distinguishing between strategic thinking and strategic planning.

The initial consideration when developing a strategy should start by incorporating design thinking into the process, proceeding the follow-on stage of constructive planning. Unfortunately, that sequence is not always the case and when the activity of planning is not informed by the logic of design the consequences can be disastrous. The U.S. strategy in the Vietnam War is an example of the lack of design. The ultimate results of that war were evidence that the strategy (using overwhelming firepower to attrite the enemy) failed because it obviously ran counter to achieving the desired end state (a stable and democratic South Vietnam).

The point here is that strategic thinking and strategic planning are fundamentally two different mental activities and need to be understood as discrete but horizontally integrated activities. In this paper, I have been exploring the issue of teaching someone to think strategically. Importantly, strategic thinking is a type of design activity; it is an intuitive, creative activity not a reasoning and calculating one. Planning on the other hand is an arithmetic activity. Said differently, one mental activity, that of planning - is analytic, the other mental activity, that of thinking - is synthetic.

I would further suggest that there are three fundamental characteristics of strategic thinking - creativity, synthesis and perhaps most importantly - character.

Determining the method for teaching these characteristics begins by thinking about how one would teach creativity, i.e. answering the implied question: can you teach someone to be creative? While there are techniques for teaching creativity the extent to which they are effective in developing a truly creative mind is not certain. Although, I would suggest that we can encourage creativity in strategists through an understanding of synthesis (thinking) as the fundamental mental process of the design phase of developing a strategy. Therefore, a frame of reference that enables someone to incorporate a different perspective in the development of a strategy is an essential for enabling the creativity required in the initial stage of strategy development.

The first step in changing our perspective is to fundamentally change the model used to inform that perspective from one that privileges vertical integration to one that privileges horizontal integration. This new perspective relies on the model of the rhizome (from botany - a mass of roots that grow

perpendicular to gravity, emanating new roots from nodes in root structure). In other words, synthesis, the design thinking that proceeds planning must focus on horizontal synthesis. The third characteristic I proposed -that of character is perhaps the hardest to teach, at least if one thinks in terms of traditional pedagogy. Much like the Socratic arguments about virtue, it may only be possible to show what character is and what it is not by example and not by education of the intellect.

If we assume for a minute that strategy can be taught, how would we teach it?

Is it like trying to teach virtue or creativity? Should we think about a person's moral development as an analogy? In the case of moral development empathy is an obvious requirement. This, in turn, brings up the question: how would you teach the quality of empathy to a person so that it becomes unconsciously reflexive in her actions? On the other hand, if we assume that strategy cannot be taught, that good strategists are only born and never made, then we are left with but one option for developing strategists.

That option is to screen potential candidates to determine which ones would make the best strategists. This option subsequently raises the question - what are the desired qualities that we would screen for in potential candidates? Leaving this question unanswered for now, let us transition to a historical example of how a strategy was developed and the end result of the implementation of that strategy.

The strategy that resulted in the German Schlieffen Plan for the invasion of France, initiated in August 1914, is a case in point. In her book *The Guns of August* Barbara Tuchman contends that the strategy that gave birth to the Schlieffen Plan was an amalgam of cultural predispositions. "A hundred years of German philosophy went into the making of this decision in which the seed of self-destruction lay embedded, waiting for its hour." While she may have been right about the power of the narratives that a country tells itself, and believes to be true, she was wrong to blame only the Germans.

The French belief in 'elan' - in the will to win, exemplified in the unquestioned belief in the power of the 'spirit of France' resulted in a strategy fundamentally based on prioritizing offensive military action. This strategy was embraced by French military leadership in spite of the evident developments in modern weapons. A strategy based on 'elan' was translated into the tactics of frontal assaults by infantry across open terrain and into deadly machine gun fire. These tactics yielded nothing more than high casualties and bloody stalemate on the Western front during the First World War. This strategy would not defeat the German Army until years later and only then by the addition of tremendous amounts of additional resources.

Importantly, the new weapons in that war such as tanks, airplanes, machine guns, poison gas, etc. would not prove to be a key factor in the outcome on the battlefield.

It was in the end not the empirical, objective factors that formed the strategic thinking and operational execution in the World War I. Rather, it was the stories the sovereign leaders told themselves. It was those 'cultural narratives' that captured their thinking about their enemies and rationalized their actions for war. It was fear that gripped the protagonists, just as Thucydides had predicted. Fear colored the assumptions those strategists made in their planning as they were confronted with the possibility of war in Europe and beyond.

The third characteristic of strategic thinking is owed to the ancient Greeks.

Among them, Heraclitus was famous for saying that "character is fate." Character is made up of the personal values and traits that define someone; the word character is also used as a measure of merit when describing another. For example, a person of good character is one who is ethical and honorable and a person of bad character, the opposite. Above all, character is a choice, but a choice formed and constrained by the context of the culture in which someone lives. If character is fate then 'good' character is essential in a sovereign leader and fundamental to the coherent development and execution of any national strategy.

With this as background, a question naturally arises like it did in our discussion of virtue, about how (or whether) character can be taught. If one is to have the 'right' character it would entail a perspective that necessarily comes from a deep understanding of one's own culture as well as another's. However, and most importantly for strategic thinkers, character is what enables someone to transcend the conventional wisdom of their culture. Right character is evident when it fosters a clear sense of skepticism sharpened by continuous reflection about the assumptions upon which a particular strategy was developed. In August of 1914 all the key players in the unfolding drama were filtering the world through narratives built on their individual and collective experience. Those filters were colored by the same three things that Thucydides proposed were responsible for the Peloponnesian war - fear, hubris and (self)interest.

Thucydides was also giving play to the distinction, illuminated centuries later by T.E. Lawrence between the rational and the irrational. In this case it could be argued that honor and hubris are driven by seemingly irrational forces and that national interest is driven by more rational forces. In fact, I would argue that there is ample evidence to suggest that even ostensibly objective and rational concerns for national self-interest of a particular country are frequently cast aside in favor of the irrational forces of fear and hubris. Even a cursory view of history shows that it is not uncommon for nations and people

to make strategic choices that are clearly at odds with their own self-interest. The attack on France by the Germans in 1914, driving through Belgium, which began World War I in earnest, is but one example.

In our consideration of the efficacy of teaching strategy it is useful to recall other past examples. One such example is the Prussian / German Kriegsakademie as it was reformed in 1810 to give military officers a general education in strategy in addition to teaching tactics. Although it provided a more diverse academic curriculum for its officers, the Akademie was mainly focused on instruction in military tactics and staff work. It was designed to produce exceptionally high-quality officers for the Prussian, later the German, General Staff. Upon graduation from the Akademie those officers would then be charged with guiding whatever political leadership was in power toward the optimum strategy for ensuring the continued dominance of the Prussian State. One of the most well-known graduates of this school, Alfred von Schlieffen was the strategist who created the plan that carried his name and was the model for the German invasion of France in 1914. Interestingly, in spite of his schooling at the Kriegs Akademie, Schlieffen was purported to have said, "A man is born, not made, a strategist."

Another example that we can draw on to answer the question "Can strategy be taught?" is from Plato's Meno Dialog in which he has Socrates address the question "Can virtue be taught?" The story begins with Socrates asking for a definition of virtue.

After much back and forth he provides some illustrative examples involving the not-sovirtuous sons of two virtuous Athenians (Pericles and Thucydides). Based on the dialog, Socrates comes to the conclusion that virtue is not knowledge and therefore cannot be taught. Virtue, according to Socrates comes from divine inspiration. Virtuous men in his view are like the prophets and oracles that speak wisdom only in this case it is wisdom that has not been acquired by education.

From Aristotle we get a slightly different view, he initially agrees with Socrates but then proceeds to develop a way for a person to become virtuous without relying on divine inspiration. To begin, Aristotle proposes that moral virtues are not innate in humans although we do have some natural capacity for their development. Virtues are attained like all habits by practice, "... we learn by doing them ... we become brave by doing brave acts." The important connection here is between the act of repeating an action until it becomes a habit and the subsequent and reflexive actions of a person displaying that virtue, i.e. bravery.

Aristotle believed that we become virtuous by practicing virtuous behavior and when that behavior becomes a habit, we are more apt to choose to act in a manner that displays virtuous behavior. The implication of all this is that Aristotle believed that moral virtues could be taught. Furthermore, he

believed that humans are neither good nor bad but have the capacity to be either. It is through a proper education that a person attains virtues such as bravery, moderation, justice, generosity, etc. Aristotle contends that virtues are the result of habitually practicing virtuous behavior. If he is right what does that mean for the development of strategists? What kinds of habits would you teach someone to make them a strategist?

The British historian Liddell Hart, a thoughtful student of strategy himself, believed that a great strategist must first have experience in the world. However, he also held that experience alone was not enough to make a great strategist. He insisted that by itself an individual's empirical experience would actually limit the bounds of imagined possibilities. Instead a deep study of history, which is vicarious experience, would expand the bounds of imagined possibilities. He also believed that part of an effective foundation for a strategist was an in-depth understanding of other academic disciplines, in particular - psychology. With this in mind we might wonder if the best strategists are more like Isaiah Berlin's famous fox, who knows many things; seeing interconnected patterns from seemingly disconnected events by sensing and understanding nuance.

The opposite of the fox according to Berlin is the hedgehog, who understands one big thing and sees the world through the lens of that one great idea. Arguably, the hedgehog has less room for flexibility and agility in thought and actions but does have the admirable quality of having a simple, singularly focused world view. I would suggest that the best strategists are part fox and part hedgehog. They are able to find that elusive balance between the two world views through an understanding of the nuance of each one's epistemological framework.

Let us now go back to the original question, "Can strategy be taught?" The answer in my mind is - well it depends. I begin examining this question by going back to the question Socrates asked in the beginning of the dialog in the Meno, "Can virtue be taught?" However, instead of trying to define virtue I will try to define the idea of strategy. I would propose that strategy is the activity of aligning resources to a postulated end state in order to identify the inherent risks in the execution of the actions necessary to achieve that end state. The activity of developing a strategy has two parts; the first is the analysis of the problem the strategy is trying to address. This part requires in-depth knowledge of the mechanical and arithmetic calculations regarding friendly force capabilities as they relate to adversary capabilities. This is the analytic phase and the skills necessary to collect and analyze data can, as T.E. Lawrence advocated, clearly be taught in schools.

However, it is that last 'irrational tenth' that is of greatest interest and is what requires the mental activity of synthesis. This phase brings together our experiences in the world and the results of our study of history, literature, psychology, etc. Synthesis in this context should not focus on gaining

tactical insights into weapons and force dispositions. Rather it should focus on gaining insight into the consciousness of the opponent, who should be the object of intentionality of our gaze.

The fundamental model of the world view that informs our current thinking about teaching strategy must change if we are to guide people to think critically about strategy. I mentioned earlier in this paper the use of the rhizome model to foster creativity in the design phase of strategy development. Now I will pick up that thread to address the problems inherent in using the current hierarchical and traditional causal model. To that end I propose that the concept of the rhizome from Deleuze and Guattari's *A Thousand Plateaus* provides a rich analogy. They describe a rhizome in the following manner: "it is unlike trees or their roots, it connects any point to any other point, and its traits are not necessarily linked to traits of the same nature." The important characteristic in this definition is that the rhizome is the opposite of the conventional model of a tree. The tree model is most often used to describe the relationship of things in the world. The tree has a clear beginning (roots) and ending (leaves) and follows a logical pattern to its growth, whereas the rhizome does not. The rhizome is a horizontal root structure that expands from its nodes, it is capable of creating new root structures that grow horizontally, not transitioning to a vertical, hierarchical plant structure. The rhizome provides a model infused with the characteristics of the 'irrational tenth.'

The tree analogy is the traditional mental model in Western thinking and is evident in the structures of our institutions whether they are military, government, schools or business organizations. There is a clear rationality to this model but it is restricting and confining. It limits a more complete understanding of events because of its causal, vertical nature. Accordingly, the tree model acts as a constraint in limiting the possible courses of action or options made evident to a strategist.

The rhizome on the other hand is more like the Internet, with no real beginning or end. It has no logical growth pattern and no clear rationality to inform a hierarchical connection of any one part with any other part. The rhizome cares not for the similarity or even the difference of those parts. Uniquely, in the context in which I am using the term, rhizome is not a thing but a process. It is a process that calls into question the relevance of hierarchical organizations as models for strategy development. Rhizome is more like a map, which can be opened to any point, anywhere and show a path to any other point, anywhere. It has no beginning or end but is always in the middle. Therefore, a rhizome is never something that is or something that was, but it is always something that is in the process of becoming, it is not this or that but, and, and, and ... The strategist must focus on the act of becoming, not on the stasis of being.

The education of a strategist should take place within the context of the rhizome.

The purpose of teaching strategy is to develop designers not craftsman. The craftsman's skills can be taught like the tactics to which Lawrence referred. The designer, on the other hand requires an interdisciplinary education. That education is a holistic process, which is conducted horizontally, not vertically and begins with incorporating the tenets of design thinking. Among the more relevant of those tenets are: honestly confronting the facts, breaking through the noise to discover what is truly important and scaling for impact at an appropriate time and place.

The designer envisions the integration of many things, even many seemingly dissimilar things. He does not need the tactical skills of a craftsman because he does not so much need to know how to make something, as he needs to know the myriad ways it can be used. In fact, a strategist who focuses primarily on tactical actions is not an effective strategist. This is because his world view is not aligned with the limitless horizon of strategic design. An effective strategist will generally not be a good craftsman because he lacks the propensity, skills and different world view of the craftsman. The craftsman pursues the excellence that comes from vertical integration while the strategist looks for the ephemeral possibilities of increased horizontal integration. Finally, the strategist must also be comfortable seeking to integrate empirical, practical capabilities with concepts in order to inform the employment of those capabilities.

A strategist should always be searching for that 'irrational tenth,' trying to find the indirect or asymmetric approach to the challenges he faces. Lastly, he must be careful not to think of the world and therefore not to design a strategy, which succumbs to inflexible but well known hierarchical models. Those models are likely to be mirror images of his culture and experience and are as comfortable for him as sitting in the shade of a tree on a hot summer day. Instead, the strategist should use the model of the rhizome, its roots twisted and random, challenging his senses and causing him to squint uncomfortably in the bright sunlight as he tries to focus. It is only then that he can uncover the assumptions that underlay his developing strategy, exposing them to the light.