Strategy, Planning, and Tactics

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Purpose of this doc

In this doc, I will lay out how I view both strategy (along with tactics) and planning, and their differences. Most of the intelligence scaling community uses definitions that are extremely arbitrary and have no basis for why they define them as they do. This is not a terrible thing, as people are free to make and define their own words. However, I would like to make a doc that takes into account the principles that are applied in the real world and uses them along with my own interpretation to give my definitions of both.

Foreword

I would like to clarify that there is no formal literature that distinguishes between a strategy and a plan. Both bleed into each other, and this distinction is completely an invention by the SCD community. However, since people do use them both separately, and being in this community, I have somewhat come to understand the shared intuition that people have regarding both of these categories. Thus, I have no choice but to use cross-domain definitions for both in order to create a grounded but outsmarting oriented distinction between both. I want to use official definitions from different domains to make this accurate and logically consistent instead of an arbitrary intuition dump. But at the end of the day, I do think both should be combined into one single category because of how interconnected both are.

Strategy

What is a Strategy?

In formal game theory, a strategy is the complete decision set or algorithm available to a player to play a game. In other words, it is the collection of all the actions a player takes in a game based on the history, opponent's choices, game states, rules, payoffs, etc. I use this definition as game theory is the only domain that defines strategy so comprehensively. The examples of this are as follows:

1. A strategy of a player is a complete description of what that player would do in her turns, given every possible history
2. The term strategy is typically used to mean a complete algorithm for playing a game, telling a player what to do for every possible situation.

3. A player's strategy completely specifies the action he is going to choose in each of his information sets, if it is reached during play of the game.

There are also other domains, like military literature and business literature, that define what a strategy is:

1. Business strategy is defined as the course of action or set of decisions that support entrepreneurs in achieving certain business goals.
2. A set of ideas implemented by military organizations to pursue desired strategic goals.

This can apply to real life and, more specifically, outsmarting situations as well. In outsmarting, **I view a strategy as the complete collection of all the actions the user has taken in a given situation.**

A good strategy in game theory is defined as one that maximizes the payoffs of the player or improves the position of the player. The goal of any player (assuming rational) in a game is to win it. Translating this to outsmarting, the best strategy would be one that takes the best possible actions based on the goals set by the character or any other entity or situation. These sets of actions would obviously depend on fluctuating conditions, variables, and choices made by other characters in the situation that the user is in, be it a teammate or opponent. Any situation inevitably has a lot of choices. Each subsequent choice you make brings you closer to or pushes you farther from the goal. The decisions you make in each stage, how well they come together, and how effective they are in approaching the best outcome, are what make a good strategy.

What does the category of strategy aim to measure?

Since I have used game theory in my definition and have defined a good strategy as one that maximizes the user's payoffs, the category of strategy, according to me, measures:

1. How well is the set of actions taken by the user aligned with the goal at hand? This is strategy alignment.
2. How well does the algorithm account for all possible changes or variance caused by others? How does the strategy fare in fluctuating conditions? This is basically what is known as strategy resilience/fortitude/adaptability.
3. How well does the strategy maximize the payoff for the user? How good is the strategy at improving the position of the user? How relevant or effective are these actions? This is strategy effectiveness.
4. How much does the strategy allow the user to remain in a dominant position? This is strategy control.

There are also measurements directed at the user as opposed to the strategy itself:

1. How well can the user create strategies? This is strategy formulation/building.
2. How well can the user create strategies for complex situations? This is strategy complexity.
3. Is the strategy created by the user efficient or needlessly complex? This is strategy efficiency.

Essentially, it is the overarching quality and robustness of the actions that are important in a good strategy.

For example, if a character needs to prevent someone from killing people, they have multiple ways of doing this. They can get them arrested, expose them publicly so everybody can avoid them, kill them instead, make sure they are rendered unable to kill anyone, etc. One of these choices will yield the best possible outcome for the character (which would be based on their personal goals, external context, and circumstances. For example, the character might be unable to kill the potential killer because they themselves will be arrested). The best strategy is simply one that chooses the best possible outcome and effectively reaches it, while adapting to or accounting for the choices that the opponent or anybody else makes. This means that the set of decisions accounts for the opponent's actions as well and contains optimal decisions.

Tactics

What is a Tactic?

In game theory, a tactic is simply the individual decision or action taken at any given point in time. It is limited in scope and can only account for a few factors.

"A tactic, in contrast, tells a player exactly how to move given only the current board position, that is, the current state of affairs on the playing board, without knowing the game-playing history of how we got to that state."

Tactics are the building blocks of an overarching strategy. If a strategy is the complete set, then a tactic is one element in it. A good tactic is one that:

1. Is the most effective in dealing with the target at hand.
2. Aligns well with the overarching strategy.

Due to it being more local than a strategy, a tactic is much more adaptable and flexible. In chess, if the entire game is the strategy followed by the player, then tactics are the pins, forks, checks, etc that the player makes throughout the game.

Should tactics be a separate category from Strategy?

In my opinion, it can be. Unlike other categories, tactics and strategy are linked in a way that they can never be looked at separately. It is not merely an overlap like strategy and planning, or reasoning and insight. Nor is it a sub-set relationship like thinking and any other category (because every category utilizes thinking, but thinking can exist separately from them). Strategy cannot exist without tactics because it is the fundamental unit of strategy. So if someone wants to consider tactics as a subcategory of strategy, that would be fair.

However, tactics can exist on their own without being tied down to a strategy. The category leans heavily into adaptability and flexibility. Therefore, I think it is fine to consider it a separate category even if it is given less weight compared to other categories.

Planning

What is a Plan?

In business, engineering/project management, and urban planning literatures, a plan is a predetermined course of action or sequence of events that needs to be followed in order to achieve the goals in the decided-upon timeframe. A plan is always time-sensitive or time-bound. It is about using foresight and deciding in advance to avoid failure in achieving the goals on time. In all the articles, there is an emphasis on words like schedules, timelines, forecasting, predetermination, details, logistics, and thinking in advance.

1. A plan is a predetermined course of action. It is a blue print for goal achievement. Simply stated, it is setting goals and deciding how to achieve them. Planning is deciding in advance what to do, how to do it, when to do it and who is to do it.
2. In more detail, urban planning entails drawing up, evaluating, and forecasting an organized, coordinated, and standardized physical arrangement of a city
3. Planning means looking ahead and preparing for the future. It means peeping into the future, analyzing it and preparing for it. Managers plan today with a view to flourish tomorrow. Without planning, business becomes random in nature and decisions would become meaningless, ad hoc choices.

4. Project planning is defined as the process of setting the scope, objectives, resource allocation timelines and execution steps to ensure that the project is completed successfully and efficiently.

In outsmarting situations, a plan simply is a clear and comprehensive sequence of events, scheduled in advance to achieve the set goals in time. The time frame can be self imposed or imposed by an external entity. The best plan is one that can perfectly predict future events and design a course of action in advance that one can follow to reach the goals set. It is predetermined, and in case of fluctuations, it should ideally already have contingencies or flexible parts in place to handle them. The emphasis on time, predetermination, and foresight in the various definitions provided makes planning a function of time and foresight.

Why is foresight important?

Planning has a similar relation to foresight as strategy does to tactics (however, the relationship isn't exactly the same). While foresight isn't exactly the building block of a plan, it is a core element. A plan cannot exist without foresight. However, foresight itself can be a separate category because it can be used independently without being a part of a plan.

What does the category of planning aim to measure?

Based on the definitions given above, planning, according to me, measures the following aspects:

1. How well can the planner formulate and prepare before the plan starts to unfold? This is planning formulation and preparation.
2. How well can the planner foresee future events, environments, and actions of others? How well can the planner time the sequence of events perfectly? This is planning accuracy.
3. How well can the planner account for all the factors, possible setbacks, and prepare contingencies or flexible sections in advance? This is planning coverage, contingencies, and flexibility.
4. How well can the planner calculate risks? This is risk calculation.
5. How well can the planner lay out detailed plans? This is planning intricacy.
6. How well can the planner allocate resources? This is planning efficiency.

So, it is the ability to foresee events, factors, setbacks, and the premeditation of actions and backups that is important in a good plan.

For example, a character needs to prevent someone from killing people. They already know that they want to get them arrested by exposing them in front of the police. They need to predict when the potential killer is going to make their move, prepare all the tools necessary, scope out the location in advance, make a blueprint of all the actions they are going to take, account for potential deviations by incorporating contingencies, position the police at the location, and time it all perfectly. The best plan is one that can predict as much as possible, design the sequence of actions and contingencies, and time everything in advance, in a way that the set goals are accomplished in time, while minimizing the need for real-time adaptation.

Planning Flexibility: Planning flexibility is not the same as adaptability. Flexibility of a plan is defined as the planner predicting the possible conflicts or hurdles to the plan in advance and leaving out flexible parts so that the plan isn't derailed. Adaptability is the person thinking in real time to adapt to setbacks to the plan.

Planning Contingencies: Contingencies are the predetermined backup plans (Plan B, C, D, etc) in place to counter or account for possible setbacks in the overall plan. Unlike planning flexibility, contingencies are more specific and defined. It tells us what to do in case X happens, or what to do in case Y happens. Flexibility on the other hand is a predetermined slack incorporated in the plan. It is fluid and not as specific or defined. The user has the freedom to find an alternative at the time of execution because the plan was designed to be flexible in that section. Flexibility can also appear in the form of having more time in a section than calculated for that specific section because the planner suspects some possible conflicts.

Strategy vs Planning

What is the relation between a strategy and a plan?

They measure different aspects of the same feat. For an analogy, imagine a ball. The ball will have mass and volume. However, mass and volume measure different aspects of the same object, the ball. They coexist and also combine to give rise to physical quantities like density. It is similar in the case of strategy and planning.

Imagine a character performs a feat that is essentially setting a goal and accomplishing said goal. This feat can be both a strategy and a plan at the same time. This is because there is nothing in their definitions that prevents them from coexisting. The choices or decisions taken to accomplish the goal, their alignment, quality, and their ability to maximize the payoffs are measured by strategy. The sequencing of events in advance,

taking into account possible setbacks, future factors, and timing to accomplish the goal in time, is measured by planning.

What are the differences between a strategy and a plan?

Strategy is a function of decision making and optimal outcomes. Planning is a function of timing and foresight. Strategy gives the “what”, “why”, and “how”. The plan gives the “when”, “where”, and “who”. They both measure different aspects and can coexist in a single feat. What strategy measures is how good (quality) the decision set is at accomplishing the goal and maximizing payoffs. Basically, it is the best way of getting to the goal. So it takes into account “what” or which path out of all the options should be taken, and “why” this path is the most effective in improving the position of the user. This can also be looked at as “how” a goal should be approached. Planning, on the other hand, measures how good the plan is designed such that whichever way is chosen to accomplish the goal can be executed in time. It is a forward looking function that utilizes foresight, meticulous details, flexible sections, and contingencies to make sure everything goes exactly as planned in advance. It is basically the best scheduling of events to minimize real time disarray or confusion. Thus, it takes into account “when” and “where” certain actions should be executed, and the possible setbacks that can happen. It also takes into account “who” is involved in both execution and setbacks. All of these help in designing a detail-oriented schedule with contingencies attached. Of course aspects of both bleed into each other like I said in the beginning.

Strategy can be both premeditated or flexible/adaptable (pure vs mixed strategies). Plans are mostly premeditated. In game theory, there are pure and mixed strategies. **Pure strategies** are completely deterministic plans or paths that the player can follow to win the game without fail. This assumes no randomness or specified probabilities. In outsmarting terms, a pure strategy would be a strategy and a plan both. So it is a **myth** that a strategy needs to always be adaptable, involve real-time critical thinking, and can’t be premeditated. **Mixed strategies**, on the other hand, involve specified probabilities in every branch of the decision tree. So the user needs to think critically about what the opponent would probably choose and act accordingly. This aligns with the popular idea of strategy. A strategy can also have little premeditation aside from a general direction and rely heavily on tactical proficiency. **Plans**, on the other hand, need to, by definition, be majorly premeditated. Of course, unexpected things happen, and people need to adapt while executing a plan. But a perfect planner wouldn’t need to adapt; they would already have contingencies and/or flexible sections in place, showing us that they predicted the setback in advance and designed the plan accordingly. **However**, if a character is accomplishing a goal and adapts a bit, that doesn’t make the overall feat less impressive. This is because while it might lose some

points in the planning aspect because of not having contingencies or flexible parts, it gains some as well in the strategy aspect because it shows overall strategy resilience.

Strategy is like a computer code. A plan is like a yearly schedule. This is an analogy I like to use to describe the difference in purpose between the two. A computer code takes inputs from others and returns the best and most accurate results. It runs on if-else decision trees, loops, recursions, stacks, etc, to give the most optimal results. A year-long schedule, on the other hand, takes into account everything that needs to be done, what possible problems can occur, and designs a schedule accordingly, in advance, so that every deadline can be satisfied.

What is a good strategy but a bad plan?

A good strategy but a bad plan is, in layman's terms, a good way to accomplish the goal and achieve a good outcome, but it is not timed well and needs real-time adaptation to accomplish the set goals. In the real world, such a person is good at making decisions but is not predictable and thus might have difficulty convincing people of his track record because of how in-the-moment his decisions are. After all, no matter how good someone is at aligning their actions to the target at hand, the execution might require some preparation, without which they might fail.

What is a good plan but a bad strategy?

A good plan but a bad strategy is, in layman's terms, a well-timed roadmap to the goal that gives alternate paths to avoid possible failures in reaching the goal itself, but it is not the best way forward and gives a suboptimal outcome. In the real world, such a person is consistent in delivering results and has good foresight, but the results themselves could be much better and more rewarding.

What is a good strategy and a good plan?

A good strategy and a good plan is, in layman's terms, a good way to accomplish the goal and achieve a good outcome, and is timed well with fair predictions and appropriate contingencies/flexible sections to ensure everything goes as planned in advance. This is what most feats of “accomplishing goals” tend to be. Most feats in strategy/planning tend to be aimed at improving the position of the user while having a fair amount of premeditation.

Do they need to be separate categories?

What if strategy, planning, and tactics were one single category? Well, it depends. They can be if that's how the scaler wants to look at the feats. However, tactics, in my opinion, need to be separate from strategy and planning. This is because tactics also measure aspects such as flexibility and adaptability that are independent of how strategy and planning are evaluated. Just like in the case of foresight. A good chunk of tactics can be independent of strategy and planning. Same for foresight.

If the scaler wants to give equal weights to strategic thinking and planning ability as the other major categories, then keeping them separate makes sense. However, most plans are strategies and vice versa. That's why it makes more sense to join strategy and planning into one category. As I mentioned in the earlier section, it is very challenging to find a feat that is purely a strategy (with no premeditation, and the ad hoc decisions happen to be the best approach) or purely a plan (with no aim of finding the best approach, but is completely premeditated). That's why an all-encompassing category that covers both planning and strategy makes the most sense, considering how interconnected these concepts are. As for what to call that category, I prefer to leave that to the individual scaler. A good alternative that is pretty popular as well, is "scheme". According to most dictionaries including Britannica, a scheme is defined as a clever plot as well as an organization or arrangement of things. These definitions capture both strategy (clever) and planning (arrangement or organization) aspects of accomplishing goals.

Afterword

This is how I view both strategy and planning. I know the majority of the community might disagree with me on this. However, this is how I could make sense of both concepts based on what I have studied in other domains. I think it is important to make definitions logically consistent internally. Established domains are a good starting point, but some modifications are needed to make the terms more outsmarting relevant while still not completely abandoning what the words actually mean.

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