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Impact of generative AI on the ideation phase of strategic planning

Impacto de la IA generativa en la fase de ideación de la planificación estratégica

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ABSTRACT

This qualitative research is based on grounded theory methodology with a rigorous, comparative analysis. It is noteworthy that its purpose is to analyze the impact of generative Artificial Intelligence (AI) on the quality, diversity, and viability of strategic options co-created by university planning teams. Currently, the use of strategic planning is crucial for organizational survival and growth (Porter, 1985), and it also faces the challenge of diminution due to cognitive biases and traditional approaches when innovating in the ideation and formulation stages (Kahneman & Tversky, 1979). Likewise, Generative Artificial Intelligence (GAI) presents an emergence, representing a technological disruption offering new strategic options (Brynjolfsson & McAfee, 2014). In turn, through in-depth interviews and thematic analysis, the perceptions and experiences of academic leaders and planners were examined. To achieve the aforementioned objectives, specific objectives were achieved, such as: identifying the main use cases as a "disruptive idea engine" and simulating feasibility scenarios. However, this research achieves cognitive advancement, which creates tension in team dynamics, changing the role of the planner to that of a "strategic curator," posing challenges regarding authorship and intellectual property of ideas. In conclusion, the increase in strategic potential is due to generative AI; long-term success will depend on universities' ability to effectively manage the new cultural, ethical, and governance challenges posed by human-machine co-creation.

Keywords: Artificial Intelligence; Ideation; Strategic Planning.

RESUMEN

Esta investigación cualitativa está sustentada en la metodología de la teoría fundamentada con un análisis comparativo y riguroso. Es de hacer notar que tiene como fin el análisis del impacto de la Inteligencia Artificial (IA) generativa en la calidad, diversidad y viabilidad de las opciones estratégicas co-creadas por equipos de planificación universitaria. En la actualidad es de carácter decisivo para la supervivencia y el incremento organizacional, el uso de la planificación estratégica (Porter, 1985), así mismo también se enfrenta el desafío de la disminución por sesgos cognitivos y enfoques tradicionales al innovar en las etapas de ideación y formulación (Kahneman & Tversky, 1979). Así mismo, la Inteligencia Artificial Generativa (IAG) presenta una emergencia lo que representa una disrupción tecnológica ofreciendo nuevas opciones estratégicas (Brynjolfsson & McAfee, 2014). A su vez, mediante entrevistas a profundidad y análisis temático, se examinó las percepciones y experiencias de líderes académicos y planificadores. Para lograr lo anteriormente descrito se sustentó en cumplir objetivos específicos, tales como: Identificación de las modalidades de uso principales como el "motor de ideas disruptivas" y la "simulación

de escenarios de viabilidad". Sin embargo, esta investigación logra el avance cognitivo lo cual genera una tensión en la dinámica de equipo, modificando el rol del planificador a un "curador estratégico", planteando desafíos de autoría y propiedad intelectual de las ideas. En conclusión, el aumenta el potencial estratégico es debido a la IA generativa, el éxito a largo plazo dependerá de la capacidad de las universidades para gestionar efectivamente los nuevos retos culturales, éticos y de gobernanza que implanta la co-creación humano-máquina.

Palabras clave: Inteligencia Artificial; Ideación; Planificación Estratégica.

INTRODUCTION

Strategic planning is the primary mechanism for an organization's adaptation and success (Porter, 1985). It should be emphasized that the ideation phase is critical for generating novel and disruptive options. However, cognitive biases and the rigidity of traditional methods are the result of process barriers (Kahneman, 2011). On the other hand, a powerful tool for co-creation at the service of strategy is offered, allowing a universe of possibilities to be explored at unprecedented speed through the emergence of Generative Artificial Intelligence (GAI) using advanced language models (Brynjolfsson & McAfee, 2014). GAI plays a fundamental role in the quality, diversity, and viability of strategic opportunities generated by human teams, with impact analysis.

University strategic planning has resurfaced amid rapid change, with institutions facing unprecedented challenges that require superior agility and foresight (Mintzberg, 1994). Traditionally, in this process, human cognition has relied heavily on the ideation phase, which is limited to the experiences and inherent biases of leadership teams (Kahneman, 2011).

Generative Artificial Intelligence (GAI) has been significantly transforming strategic planning processes, thereby serving as a device for organizational adaptation and acceptance (Porter, 1985).

Traditionally, the ideation phase was part of human cognition, which is inherently biased and limited, but advanced language models (Kahneman, 2011) can overcome these limitations. However, with the emergence of GAI, this is a powerful tool for strategic co-creation. It should be recognized that it allows for the deepening of an extensive universe of capabilities, accumulating massive volumes of data to simulate scenarios and generate disruptive options (Brynjolfsson & McAfee, 2014).

In this context, AI acts as a "cognitive co-pilot" that should not be compared to human decision-making, increasing the quality, diversity, and viability of strategic ideas (Davenport et al., 2023). In the university setting, it is essential to confront the challenges posed by rapidly changing circumstances, where technological disruption and new labor-market demands require agility and a highly forward-looking vision (Mintzberg, 1994). The adoption of IAG by academic planning groups becomes a crucial research objective, seeking to examine how this instrument defines creativity and decision-making, and how its integration promises a prototype of adaptive, forward-looking governance.

However, systems capable of producing novel and coherent content are the product of the maturity of generative Artificial Intelligence (AI), which can shift how institutions conceive of their future. Tools can enhance strategic creativity (Davenport et al., 2023) by analyzing large volumes of internal and external data, enabling the simulation of future scenarios and the

generation of disruptive strategic options. This is an observation that human planners might overlook (Susskind & Susskind, 2020).

The practices of adopting generative AI by planning teams aim to determine the magnitude, modalities, and ethical implications. The aim is to establish how this technology influences the quality, originality, and speed of the strategic ideas produced, and whether its integration leads to a more forward-looking and adaptive model of academic governance. More specifically, the goal is to provide a robust analytical framework for effectively integrating generative AI into the core of academic leadership and management to fill an empirical gap.

DEVELOPMENT

Strategic planning has traditionally been defined by authors such as Porter (1985) in terms of competitive advantage and positioning, or by Mintzberg (1994), who criticized its excessive formality and advocated a more emergent, flexible approach. The ideation or option formulation phase is critical but intrinsically vulnerable to cognitive biases that limit the exploration of novel alternatives (Kahneman, 2011). Therefore, any tool that mitigates these biases and broadens the spectrum of options is relevant. The challenge is to assess whether technological assistance promotes genuinely strategic creativity or merely generates an "illusion of diversity."

The advent of generative artificial intelligence (GAI), primarily through Large Language Models (LLMs), has radically changed the way content is created and problems are solved. Brynjolfsson and McAfee (2014) point out that these technologies are transforming tasks, noting that collaboration between people and machines will be fundamental in what they call the "second machine age." The main idea is that GAI helps to expand options and think outside the box, although the quality and feasibility of these ideas still need to be analyzed and validated by humans in each context.

Susskind & Susskind (2020) argue that digital disruption requires examining models of academic leadership and strategic planning. Regarding the empirical gap in understanding how generative Artificial Intelligence (AI) impacts the quality and dynamics of strategic ideation in higher education, a sector characterized by institutional inertia, Mintzberg (1994) points out that it does so. Similarly,

Davenport et al. (2023) recognize that the potential of AI remains unexplored in the university context, thereby increasing operational efficiency and its role in disruptive strategy and the generation of strategic knowledge.

The theoretical framework for this research is based on an approach to three essential pillars:

1. Strategy and its development: Analyzes Strategy Theory, understanding it from a design to a cognitive approach, establishing ideation as a process that combines logic and intuition.
2. Technology-Assisted Cognition: Examines the interaction between human and algorithmic (AI) abilities, with the application of Artificial Intelligence functioning as a "co-pilot" that helps reduce cognitive biases such as anchoring and confirmation (according to Kahneman, 2011).
3. Ethical Regulation of AI in Education: Covers the governance of Artificial Intelligence, focusing on the ethical, equity, and transparency implications of making strategic decisions with algorithmic support.

The research goes beyond a mere technical analysis of Generative Artificial Intelligence (GAI). Its purpose is to elucidate the profound organizational and cultural effects resulting from its integration into the university environment.

The expected results are:

1. Theoretical value to the discipline of strategic university management.
2. A practical and responsible model for the adoption of GAI.

This framework seeks to enhance the vision of the future and strengthen institutions' adaptability in the 21st century.

Research on the Impact of Generative AI on University Strategic Ideation requires an active, committed methodology that goes beyond passive measurement to seek reflective intervention and transformation in the real-world environment of university management.

Qualitative Approach

Depth and Human Meaning. This research, rooted in the qualitative paradigm (Creswell & Creswell, 2018), aims to investigate the depth, context, and human meaning of the phenomenon. In determining this, the introduction reorganizes thinking, creativity, and power dynamics within the strategic planning process. To achieve this rich, context-rich learning, the methodological development is critically directed at the expectations of key actors: leaders, planners, and academics who experience the tension and potential of AI in decision-making.

Research Design

Voice and Contrast of Experiences: the research project is based on Grounded Theory (Corbin & Strauss, 2015) using a Case Study approach, which allows for deep immersion:

Case Study as Living Narrative: three universities were selected not as objects of study, but as institutional settings with different cultures of technological maturity and AI governance models. The objective was to link the wealth of experiences and contrasting perceptions (Yin, 2018) between institutions that are just adopting AI and those that have integrated it ethically.

Theory for Interpretation: this perspective ensures that the theory emerging from the study is not imposed but is built inductively from the voices, dilemmas, and practices of the actors. This argument supports the ecological validity of the findings and resonates with the human complexities of strategic ideation.

Semi-structured interviews were used as a data collection technique, focusing on interviews with high-level leaders and members of strategy teams. The questions explored experiences with generative AI, the meaning attributed to it, and how this technology reconfigures power dynamics and the culture of ideation. Additionally, documentary analysis of meeting minutes or draft strategic plans was used to contextualize the actual use of AI.

The information was analyzed using thematic analysis to identify patterns and emerging categories, and to develop a conceptual framework to understand the interaction between generative AI and strategic cognition. Rigor was ensured through the triangulation of sources and participants' verification that the interpretations reflect the realities of the institutions studied. The final product was an understanding of the transformation of university strategic ideation through this new technology.

The research on the impact of generative AI on the ideation phase of strategic planning used

a qualitative methodology, specifically Grounded Theory (GT).

This theory is justified by its ability to build a theory from data, rather than testing a pre-existing theory. This perspective is suitable for delving deeper into an emerging phenomenon, such as the integration of generative AI into strategic planning, discovering the dynamics, processes, and experiences in which the actors involved coexist. This methodology is iterative and reflective, and FT aligns well with the need to understand how this new technology is reconfiguring ideation practices in institutions, beyond what the current literature provides.

Sample and Theoretical Sampling

The sampling process was carried out as follows:

1. *Implementation:* The researcher began with a general notion of purposive sampling. The first key informants were identified in academic institutions that have experimented with generative AI tools across various strategic processes.
2. *Iteration and* adjustment: Initial data were collected and analyzed through semi-structured interviews and document analysis, yielding conceptual categories. These categories led to the selection of subsequent informants.
3. *Theoretical finding:* The theory is developed with the contribution of the categories. Subsequently, confirming and disconfirming cases were observed, which contributed to conceptualizations and strengthened the emerging theory.

Qualitative Data Analysis

Data analysis was carried out in conjunction with data collection, with constant comparison, a characteristic method of Grounded Theory. It should be noted that the coding process will be carried out in several stages:

1. *Open coding*: The interviews and documents were broken down line by line, *identifying* and labeling key concepts. Initial labels were created to reflect the participants' experience and language.
2. *Axial coding*: At this stage, connections were established between the categories. Within the categories, it was possible to relate and highlight causes, consequences, context, and strategies used by the informants.
3. *Selective coding:* A central category was then determined that integrates all the others, constructing a coherent theoretical narrative that explains the impact of generative AI on strategic ideation. This process led to analytical memos that documented the researcher's written reflections.

Limitations of the Methodology

It should be noted that among the limitations encountered are:

1. Biases may influence the way categories are constructed.
2. Validity depends on the emerging theory's capacity.
3. A thorough analysis was carried out to ensure that no important information or perspectives were overlooked.

The choice of Grounded Theory provided detailed research into the complex and dynamic impact of generative AI in the strategic ideation phase, allowing for an assimilation of the phenomenon from the perspective of the actors themselves.

Likewise, the findings were related to the observations themselves and to the studies of interest, pointing out their contributions and limitations without reiterating data already discussed in other sections. The inferences from the findings and their limitations should be

presented, including implications for future research, and the conclusions should be linked to the study's objective, avoiding gratuitous statements and conclusions that are not fully supported by the data.

The qualitative thematic analysis, based on the direct voice of university leaders and planners, has revealed the complexity of the impact of generative AI. The findings demonstrate the technical description and how the technology performs cognition, team dynamics, and ethical structures, thereby validating the quality, diversity, and viability of co-created strategic options.

1. Modalities of Use: AI is a "Human Vision Accelerator."

Teams is a high-level strategic assistant. With three functions that demonstrate a symbiosis:

- *Generation of* Disruptive *Options*: AI is a creative catalyst, with solutions to propose new models of organizational programs.
- *Strategic Impact Simulation*: The tool is an accelerated financial viability projection that provides the team with feedback on the potential consequences of their ideas.
- *Mapping Global Trends*: AI reduces the time needed to identify labor market needs and educational trends, freeing leadership to focus on interpretation.

Finally, AI increases leaders' scouting capabilities, freeing up their cognitive capital for strategic judgment and value-based decision-making.

2. Cognitive Changes and Team Dynamics: Empowerment and Intellectual Property.

The introduction of AI has had a polarizing impact on the human capital of the strategy, where the following could be observed:

- *Cognitive Benefit (Quality):* AI combats inertia in strategic thinking, reducing confirmation bias and increasing the diversity of initial ideas.
- *Tension in Dynamics (Ownership*): A crucial division was observed. Technophiles feel creatively empowered. However, other members reported a sense of "loss of intellectual property" or authorship over the ideas generated.

The challenge lies in managing authorship and ownership. It is important to establish new policies that ensure creativity is a collective achievement.

3. Challenges and Governance: Trust, Legitimacy, and Algorithm Ethics

The final problem with AI adoption is the institutional resources and ethical legitimacy of strategic decisions: The Need for Enhanced Ethical Governance. The way to overcome this "legitimacy crisis" is through action. "Enhanced Strategy Audit Committees" must be created.

Ultimately, Susskind & Susskind (2020) point out that the long-term viability of generative AI depends on whether the institution manages to engage with the technology by enhancing human vision with inclusion, equity, and transparency, rather than nullifying it with incomprehensible opacity. Improvements in ideation lie in ethical and governance frameworks and in safeguarding the human essence of decision-making (table 7.1).

Specific Objective	Emerging Central Category (Substantive Theory)	Key Subcategories/ Properties (Axial Coding)	Consequences/Explained Phenomenon (Related to Ideation)
Analyze the impact of using generative AI on the quality of co-created strategic options.	A. Transformation of the Strategic Quality Standard	A.1. Analytical Depth: Greater or lesser rigor in the base diagnostic.	AI raises the "acceptable" threshold, forcing human teams to focus on contextual viability and ethical judgment beyond mere logic or coherence.
		A.2. Internal Coherence: Degree to which options align with mission and resources.	Breakdown of cognitive biases in formulation, but risk of homogenization if AI is not guided by diverse prompts.
		A.3. Empirical Foundation: Speed and breadth of data support for the option.	Trust in the source of the AI's input (transparency) becomes a critical factor of perceived quality.
Analyze the impact of using generative AI on the diversity of co-created strategic options.	B. Expansion of the Cognitive and Thematic Horizon	B.1. Thematic Scope: Inclusion of previously unconsidered topics (e.g., emerging risks).	AI acts as a "provocateur agent," injecting "disruptive ideas" or "outside perspectives" (e.g., from other sectors) that break the inertia of university strategic thinking.
		B.2. Variability of Approaches: Number of conceptual frameworks or strategic paradigms used.	The ease of generation drives a larger quantity of initial options (volume), but the challenge lies in managing information overload.
		B.3. Inclusion of Voices: Reflection of external or minority perspectives in the options.	A "democratization of inspiration" is observed by allowing less experienced members to contribute robust options thanks to AI support.
Analyze the impact of using generative AI on the viability of co-created strategic options.	C. Reconfiguration of the Evaluation and Validation Process	C.1. Operational Realism: Estimation of necessary resources, time, and infrastructure.	AI accelerates pre-validation, filtering out unfeasible options in early stages by simulating scenarios, which reduces ideation time and increases team efficiency.
		C.2. Risk and Resilience: Early identification of threats and mitigation plans.	Human teams reorient their effort from basic creation towards critical evaluation, fine-tuning, and political negotiation of the generated options.
		C.3. Stakeholder Acceptance: Perception of the options by the university community.	A new reliance on AI's predictive capabilities emerges, but the need for the "Human Seal" remains to legitimize and obtain the community's commitment.

Table 7.1. Analysis of responses

CONCLUSIONS

The integration of generative AI is of great importance in the ideation phase of university strategic planning, as it represents a turning point by increasing the quality and diversity of strategic options, placing critical demands on governance and academic leadership.

AI has shifted from being an analytical tool to becoming an "engine of strategic co-creation." Likewise, key uses such as the reproduction of disruptive program models and feasibility simulations confirm the broadening of the institution's strategic horizon. A cognitive transformation in teams is confirmed.

AI reduces human bias by considering radical strategic options. However, the improvement in strategic quality creates cultural tension, with the change in the planner's role to "strategic curator" marking a milestone in the authorship of ideas.

Finally, one limitation is emphasized: the ideas generated by AI regarding strategic viability are intrinsically linked to their legitimacy. Algorithmic opacity and the need to audit input data are perceived as direct threats to inclusion and transparency in decision-making. In conclusion, the positive impact of generative AI will be realized if universities establish ethical governance and transparency frameworks grounded in accountability, thereby transforming AI from a technical tool into a reliable strategic partner.

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CONFLICTS OF INTEREST

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