Lean and Agile Strategic Planning: Reframing Organizational Strategy for Competitive Advantage

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Abstract—**Traditional strategic planning, rooted in mid-20th-century corporate practice, relies on exhaustive forecasting, centralized control, and bulky documentation that quickly becomes obsolete in contemporary markets. The resulting rigidity, resource intensity, and hierarchical decision-making inhibit responsiveness, stifle innovation, and distract organizations from emerging opportunities. Integrating change theory, dynamic capabilities, and behavioral science, a framework based on clarity, focus, and action is presented as a practical tool for adaptive strategy. The approach distills planning into three iterative phases: (1) clarity, articulating concise, measurable objectives that align stakeholders; (2) focus, prioritizing the few high-leverage initiatives that create disproportionate value; and (3) action, embedding short execution cycles, real-time feedback, and decentralized decision rights to enable rapid course correction. Lewin's change model, Kotter's eight steps, the McKinsey 7-S, OKRs, and research on psychological safety are integrated to show how leadership behavior and organizational culture underpin successful implementation. Evidence is provided demonstrating how organizations that embrace lean and agile strategic planning achieve faster decision-making speed, higher employee engagement, and greater resilience during shocks such as digital disruption and the COVID-19 pandemic. The intent of this article is to position agile strategic planning as both a governance mechanism and a learning system, transforming traditional strategic plans into living documents that continuously and iteratively align intent with reality. Successful adoption necessitates adept transformational leadership, a climate of psychological safety, and cross-functional transparency, thereby fostering iterative learning and sustained strategic alignment within today's volatile, complex, and often ambiguous organizational landscape.**

Keywords—**agile strategic planning, clarity-focus-action framework, transformational leadership, psychological safety, dynamic capabilities, decentralized decision-making, living strategic plan**

I. INTRODUCTION

Strategic planning has historically served as a cornerstone of organizational management, facilitating informed decision-making processes, practical goal-setting, and efficient resource allocation [1]. Originating from military strategy and later adapted by corporate entities in the mid-20th century, traditional strategic planning emphasized detailed forecasting, comprehensive documentation, and centralized control [2]. As organizations grew more complex, strategic planning methodologies evolved, giving rise to frameworks such as SWOT analysis (strengths, weaknesses, opportunities, threats), competitive positioning [3], and scenario planning [4].

Despite its widespread adoption, conventional strategic planning faces critical scrutiny due to its inherent rigidity and resource-intensive nature. Contemporary criticisms include that traditional methods often fail to keep pace with the rapid advancements in technology, market volatility, and societal changes [5]. Hiam [6] and Mankins and Gottfredson [7] specifically highlight common misconceptions that plague organizational strategic planning, including the belief that complexity equates to effectiveness, comprehensive documentation ensures clarity, and fixed, long-term goals guarantee organizational stability. These misconceptions contribute to strategic plans becoming static documents rather than dynamic tools for continuous adaptation and organizational growth.

The contemporary business landscape is characterized by unprecedented levels of uncertainty, driven by globalization, digital transformation, and fluctuating market conditions [8, 9]. Organizations now operate within environments where adaptability and agility are not merely advantageous but essential for survival and sustained competitive advantage [10]. To respond effectively, organizations must reconceptualize their strategic planning processes, shifting toward lean, agile methods that emphasize responsiveness, simplicity, and real-time adjustments [11].

This article advocates a lean and agile approach to strategic planning, incorporating clarity, focus, and an action framework as a practical and effective tool for implementation. This framework, grounded in empirical findings from leadership studies, behavioral science, and resilience theory, streamlines strategic processes, enhances adaptability, and promotes enduring organizational success. Subsequent sections of this paper critically explore the limitations of traditional strategic planning, detail the theoretical and practical dimensions of agile strategy formulation and execution, and illustrate their efficacy through real-world organizational examples. In this manuscript, agility refers to rapid organizational pivots in response to change; adaptability denotes the capacity to evolve business models, processes, or strategies over time to fit new conditions; and responsiveness reflects the speed and efficiency with which an organization detects and reacts to immediate signals or disruptions. These distinctions are maintained throughout the manuscript to improve conceptual clarity. Thus, the guiding question of this manuscript is: How can organizations replace traditional, rigid strategic planning approaches with a lean and agile framework based on clarity, focus, and action, thereby enhancing adaptability, responsiveness, and sustained strategic alignment in complex and uncertain environments?

II. STRATEGIC PLANNING: LIMITATIONS AND CHALLENGES

Traditional strategic planning, deeply rooted in structured and prescriptive methodologies, is characterized by comprehensive documentation, extensive forecasting, and hierarchical decision-making processes. Historically, strategic planning involved rigorous data collection, analysis, and projection to predict future organizational scenarios, assuming that markets were relatively stable and predictable [1]. One fundamental limitation of traditional strategic planning is its inherent rigidity. Plans formulated under this paradigm often follow a linear progression, assuming that future circumstances will unfold as anticipated. However, empirical studies reveal that rigid plans typically become obsolete shortly after implementation due to unforeseen changes in market conditions, technological advancements, or competitive actions [12, 13]. Consequently, organizations bound to these rigid plans experience reduced agility and responsiveness, limiting their capacity to pivot and adapt quickly. Moreover, the complexity of traditional strategic planning often results in overly detailed and cumbersome documents, diminishing their practical utility. Porter [14] underscored that extensive documentation can obscure clarity, leading to confusion and misalignment among organizational members. Complex plans can thus detract from strategic focus, making it challenging for teams to distill actionable insights and prioritize activities effectively.

Resource intensiveness is another critical issue associated with traditional strategic planning. Developing and maintaining elaborate strategic plans requires significant investments in terms of time, human resources, and financial capital. Organizations may find themselves allocating substantial resources to strategic planning activities, diverting attention from critical operational tasks and immediate strategic opportunities [5]. It is worth noting that traditional strategic planning methods are often predicated on centralized decision-making. Such hierarchical structures can impede information flow, slow down decision-making processes, and stifle innovation [15]. Centralized control mechanisms often limit the engagement and input of frontline employees, reducing the organization's ability to leverage diverse perspectives and respond rapidly to emerging issues and opportunities.

III. REFRAMING STRATEGIC PLANNING: SIMPLICITY, AGILITY, ADAPTABILITY, AND RESPONSIVENESS

To effectively navigate the limitations inherent in traditional strategic planning, organizations must adopt frameworks emphasizing simplicity, agility for rapid pivots, adaptability for evolving processes over time, and responsiveness for swift reactions to immediate challenges. Lean strategic planning methodologies prioritize streamlined processes, minimalistic documentation, and rapid implementation cycles, significantly enhancing an organization's ability to adapt swiftly to changing environments [11]. These methods reject the notion that complexity equates to strategic rigor, instead advocating clear, concise, and action-oriented planning documents [16].

Agility in strategic planning incorporates iterative processes and continuous learning cycles, characteristics central to the Objectives and Key Results (OKRs) methodology popularized by [17]. OKRs facilitate goal alignment and performance tracking through clearly defined, measurable objectives and key results that are regularly reviewed and adjusted. While agility focuses on structural and cultural capacity for rapid pivots, adaptability emphasizes longer-term evolution of processes, strategies, or business models to fit changing conditions, and responsiveness reflects an organization's immediate speed and efficiency in reacting to specific external or internal triggers. This approach promotes organizational responsiveness by embedding flexibility into strategic processes, allowing plans to evolve in alignment with ongoing changes in external and internal conditions [13]. Responsiveness further requires organizations to adopt decentralized decision-making models, empowering teams at operational levels to respond proactively and promptly to emerging challenges and opportunities. Decentralization enhances the organization's capacity for innovation and rapid adaptation by ensuring that strategic decisions are informed by frontline insights and operational realities [15]. By synthesizing simplicity, agility, and responsiveness into their strategic planning frameworks, organizations significantly enhance their capacity to adapt and thrive in the face of uncertainty. The following sections will delve deeper into these agile methodologies, exploring their theoretical foundations, detailed application practices, and illustrative organizational case studies that demonstrate successful agile strategy implementation.

IV. THEORETICAL FOUNDATIONS OF AGILE CHANGE

Agile change theories are deeply rooted in foundational models of organizational change and development [18, 19]. Seminal frameworks, such as Lewin's Three-Step Change Model, Kotter's Eight-Step Process, and McKinsey's 7-S Framework, provide critical insights into the theoretical foundations of agile methodologies [15, 20, 21]. Lewin's Three-Step Change Model [20] emphasizes the importance of managing transitions through unfreezing, changing, and refreezing phases. In agile strategic planning, the *unfreezing* phase aligns with recognizing and breaking from traditional, rigid strategic paradigms. The *changing* phase involves iterative testing, learning, and adaptation, which are central to agile practices. The final *refreezing* phase corresponds to embedding new, agile behaviors into organizational culture, promoting resilience and responsiveness.

Kotter's Eight-Step Process offers a structured yet flexible roadmap that supports agile principles by emphasizing urgency, coalition building, clear communication, and empowering broad-based actions [15]. Kotter's process emphasizes the importance of creating a clear vision for change, removing obstacles, and achieving short-term wins, all of which are crucial for sustaining momentum in agile environments. The iterative nature of Kotter's steps aligns seamlessly with agile methods, providing continuous feedback loops crucial for adaptive planning. The McKinsey 7-S Framework [21] integrates strategy, structure, systems, skills, staff, style, and shared values into a holistic view of organizational effectiveness. In agile strategic planning, this framework underscores the interconnectedness of internal organizational factors. Effective agile change requires alignment across all seven dimensions, with a particular

emphasis on shared values, culture, and staff empowerment as critical factors that facilitate agility and adaptability.

These foundational theories collectively inform agile strategic planning by highlighting key principles such as iterative learning, continuous improvement, decentralization, and organizational alignment. Empirical research supports the effectiveness of agile methodologies, demonstrating increased innovation, enhanced decision-making speed, and improved organizational resilience [9, 10]. Thus, leveraging these theories provides organizations with a robust framework for navigating the complexities and uncertainties inherent in contemporary strategic environments. A conceptual model summarizing these relationships is presented in Fig. 1, visually depicting how the clarity-focus-action framework integrates with supporting constructs to achieve agile strategic planning outcomes.

While substantial research exists on individual frameworks such as Lewin's model, Kotter's steps, and McKinsey's 7-S, few studies have synthesized these diverse theoretical streams into a cohesive, practical framework explicitly tailored for lean and agile strategic planning. The literature lacks an integrated model that translates these theories into an actionable cycle of clarity, focus, and action applicable across sectors and organizational sizes. This article addresses this gap by offering a unified framework that bridges theory and practice for organizations navigating dynamic and uncertain environments. Additionally, although studies such as those by Kotter [15], Lewin [20], and Hubbart [18, 19] explore components of change and agile methodologies, none to date have presented a consolidated framework that integrates these concepts into a unified approach for agile strategic planning.
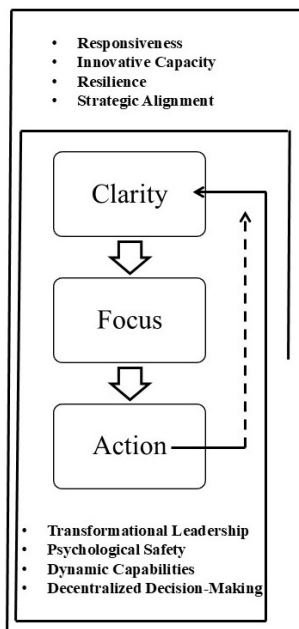

Fig. 1. Conceptual model of lean and agile strategic planning.

V. CORE FRAMEWORK: CLARITY, FOCUS, AND ACTION

A clarity, focus, and action framework for strategic planning provides a structured yet flexible approach for organizations to implement agile strategic planning effectively. This framework distills complex strategic planning processes into three clear, interconnected phases,

each grounded in robust theoretical and empirical foundations. While this framework is designed to be broadly applicable, the author recognizes that its practical implementation may vary across industries, organizational sizes, and regulatory environments. Factors such as market volatility, resource constraints, and sector-specific dynamics will influence how organizations tailor each phase of the clarity-focus-action process to their unique contexts.

A. Clarity

The initial phase, clarity, emphasizes setting precise, measurable, and actionable goals. According to Locke and Latham's goal-setting theory [22], clear and specific goals significantly enhance motivation and performance by providing organizational members with a definitive sense of direction and purpose. Lean strategic tools, such as one-page strategic plans, further reinforce clarity by distilling complex strategies into easily understandable and communicable formats [16]. By clearly articulating strategic objectives, organizations facilitate alignment and coherent action among employees, minimizing confusion and maximizing strategic coherence.

B. Focus

The focus phase involves identifying critical strategic levers and prioritizing initiatives that will deliver substantial impact. Strategic prioritization frameworks, such as the concept of "good strategy" by Rumelt [23], emphasize the importance of identifying core strategic issues and allocating organizational resources to these areas. Effective environmental scanning methods [24] enable organizations to systematically evaluate external and internal contexts, allowing strategic planners to pinpoint opportunities and threats accurately. By focusing attention and resources on high-impact activities, organizations enhance their strategic agility, enabling them to respond more effectively and efficiently to dynamic environmental changes.

C. Action

The action phase translates clarity and focus into concrete, iterative activities that will achieve strategic objectives. This phase leverages insights from habit formation and behavioral science, particularly those articulated by Clear [25] and Duhigg [26], who emphasize the significance of regular, incremental actions in creating sustainable organizational habits. Embedding strategic actions into daily and weekly routines encourages consistency and continual progress. Mintzberg and Waters [13] emphasized the necessity of iterative strategic adjustments, recommending frequent evaluations and adaptive modifications of strategies to account for feedback and dynamic circumstances. This iterative cycle of action, feedback, and refinement ensures continuous alignment with strategic objectives, enhancing organizational responsiveness and agility.

VI. LEADERSHIP AND CULTURE IN AGILE STRATEGY EXECUTION

Leadership behaviors and the prevailing organizational culture have a profound influence on the effective execution of agile strategies. Agile strategic planning cannot thrive in environments that are hierarchical, opaque, or rigidly structured. Instead, it requires leadership that champions

adaptability, psychological safety, and distributed decision-making [27, 28]. Common barriers to adopting agile strategic planning include cultural resistance to change, leadership misalignment regarding agile principles, and operational inertia that can hinder the timely execution of iterative processes. Transformational leadership plays a pivotal role in fostering conditions conducive to agile strategy. This leadership style, characterized by vision-setting, individualized consideration, intellectual stimulation, and inspirational motivation, aligns closely with the dynamic demands of agile environments [29]. Transformational leaders cultivate a commitment to change and build the trust necessary to engage teams in continuous strategic iteration [30]. They model resilience and openness, encouraging teams to view setbacks as opportunities for learning rather than failures.

Psychological safety, a shared belief that the team is safe for interpersonal risk-taking, is foundational to effective agile planning and execution. According to Edmondson [27], psychological safety enables candid feedback, innovation, and experimentation, which are essential components of the adaptive cycles central to agile strategy. In psychologically safe environments, employees are more likely to voice concerns, contribute novel ideas, and challenge assumptions without fear of reprisal. This openness accelerates learning loops and enhances the quality of strategic decisions. The role of culture is equally significant. Agile strategy thrives in cultures that value transparency, collaboration, and continuous improvement [31–33]. Organizational cultures oriented around learning and flexibility, often typified by adhocracy or clan culture types, are more adept at executing agile strategy than those oriented towards control and stability. Consequently, leaders must cultivate a culture defined by shared values, established rituals, and constructive feedback systems to promote adaptive strategic action.

Decentralization is another cultural shift that supports the execution of agile strategies. Rather than relying solely on top-down directives, agile organizations empower mid-level managers and frontline teams to make decisions aligned with strategic priorities [12, 13]. This empowerment fosters responsiveness and accountability, enabling faster reaction times and localized problem-solving. Importantly, agile leadership also requires comfort with ambiguity. Leaders must guide their organizations through complex, evolving conditions without always having clear answers. Leading through sometimes ambiguous change demands a high level of emotional intelligence, tolerance for risk, and strategic foresight [34]. Such leaders create coherence amid complexity by articulating clear strategic intent while allowing flexibility in execution.

VII. BUILDING ORGANIZATIONAL RESILIENCE THROUGH AGILE PLANNING

Resilience in organizations refers to their ability to anticipate, absorb, adapt to, and recover from disruptive events and environmental changes while continuing to function and thrive [35]. In volatile and uncertain environments, strategic resilience becomes a critical capability, distinguishing organizations that merely survive from those that transform adversity into an advantage. Agile planning is crucial for developing resilience through adaptability, decentralized structures, and continuous learning. Agile strategic planning enhances resilience by shifting the paradigm from fixed, long-term forecasting to iterative, short-cycle planning. This approach aligns with theories of dynamic capabilities, which emphasize an organization's ability to sense, seize, and reconfigure in response to changing environments [10]. Through the facilitation of rapid reassessment and realignment of strategic priorities, agile planning allows organizations to remain responsive to emerging risks and opportunities. For example, using short planning cycles, often quarterly rather than annually, allows leaders to course-correct based on real-time data, stakeholder feedback, or environmental changes [9]. Decentralized strategic engagement fosters resilience. Decentralized decision-making frameworks, distributing authority across team networks instead of concentrating it within upper management, enable organizations to respond more rapidly to disruptions. This approach fosters local autonomy and accountability, enabling micro-level responsiveness that complements macro-level strategic coherence [36]. The COVID-19 pandemic underscored the value of this decentralization, as many resilient organizations leveraged empowered teams to rapidly adapt their operations, communications, and service delivery in the face of uncertainty [37].

Agile strategic planning methodologies facilitate ongoing learning and iterative feedback mechanisms, which are crucial for organizational resilience. They foster a culture where experimentation, learning from failure, and iterative improvement become the norm. Senge [38] presented a framework of the learning organization that supports this perspective, indicating that adaptive capacity hinges on transparent information exchange, double-loop learning processes, and interdepartmental cooperation. These cultural attributes allow agile organizations to evolve in concert with changing environments. Moreover, psychological resilience at the organizational level is reinforced through strategic clarity and cultural alignment. Clear strategic intent, communicated through simplified agile frameworks such as OKRs, provides a stabilizing force during volatility, helping employees remain focused and motivated [17]. Cultures demonstrating resilience emphasize transparency, inclusivity, and a mission-driven approach, thereby fostering both internal cohesion and external confidence [31]. Ultimately, agile strategic planning functions as both a tactical tool and a strategic enabler of resilience. With effective implementation, the approach enables proactive, adaptable, and responsive organizational management. The integration of agile principles, short planning cycles, decentralized decision-making, responsive adaptation to feedback, and a cohesive organizational culture enables organizations to withstand and succeed through disruptive change.

VIII. STRATEGIC PLAN AS A LIVING DOCUMENT

The concept of a strategic plan as a static document is increasingly obsolete in a world defined by continuous disruption and rapid change. In agile organizations, the strategic plan is a dynamic, evolving instrument, often referred to as a "living document." This approach shifts the function of planning from predicting and prescribing to iterating and adapting, ensuring that the plan remains aligned

with organizational goals and external realities. A living strategic plan is revisited frequently, typically on a quarterly or monthly basis, rather than annually or biannually, as in traditional models. These regular reviews are grounded in real-time data, stakeholder feedback, and lessons learned through experimentation and reflection [39]. The iterative nature of these updates enables leaders to identify emerging trends, detect underperformance, and make informed adjustments, maintaining strategic relevance and momentum.

Strategic plans that function as living documents are typically structured around agile methodologies such as Objectives and Key Results (OKRs) or strategic sprints. These structures emphasize short-term goals tied to long-term vision, allowing flexibility in how objectives are pursued while maintaining consistency in strategic intent [17]. They also incorporate rolling planning horizons, which provide a structured yet flexible window for adaptation. This approach avoids the trap of locking organizations into outdated trajectories and instead fosters continuous alignment with shifting priorities. A key feature of living strategic plans is the integration of multiple feedback loops. These include quantitative metrics, such as key performance indicators (KPIs), as well as qualitative inputs gathered from team retrospectives, stakeholder dialogues, and user feedback. Such mechanisms enable organizations to identify barriers, reassess assumptions, and recalibrate strategies swiftly [9, 40]. Culturally, treating the strategic plan as a living document reinforces a mindset of continuous improvement, shared ownership, and ongoing organizational change. When plans are visible, regularly discussed, and broadly accessible, they serve not only as coordination tools but also as engagement platforms. Employees understand how their daily activities align with strategic objectives, increasing motivation and accountability [27].

Living strategic plans require disciplined administrative structures to remain effective. Agile administrative frameworks necessitate regular progress assessments, transparent reporting mechanisms, and empowered, self-directed teams responsible for achieving clearly defined goals. Effective leadership is crucial for preserving the integrity of the process, preventing both over-engineering and neglect, and promoting its use for collaborative sense-making and strategic development. The living strategic plan fundamentally facilitates agile planning by shifting the strategic approach from a fixed model to a responsive, learning-focused system that adapts to the organization's development.

IX. BENEFITS OF LEAN AND AGILE STRATEGIC PLANNING

Organizations that implement lean and agile strategic planning may realize a broad range of benefits, many of which directly enhance their competitiveness, responsiveness, and long-term sustainability. These advantages emerge from simplifying complex processes, embedding adaptability into accelerated planning cycles, and fostering a more engaged and empowered workforce. One of the most significant benefits is improved responsiveness, which enables the organization to detect and react quickly to real-time developments. This nimbleness differs from agility, which refers to the organization's capacity for broader, rapid pivots in strategy and structure, and from adaptability, which

reflects gradual evolution of practices and business models over time. All three capabilities are vital in environments characterized by volatility, uncertainty, complexity, and ambiguity [41]. Lean and agile planning enables continuous environmental scanning, faster decision-making, and dynamic resource allocation, all of which help organizations capitalize on emerging opportunities and mitigate threats more effectively. Another key benefit is increased strategic clarity and alignment. Agile planning emphasizes transparency and short-term objectives, ensuring that employees at all levels understand how their work contributes to broader organizational goals [17]. This alignment fosters coherence across organizational units and functions, reducing duplication of effort and reinforcing a shared sense of purpose. Clearer goals and tighter feedback loops also enable more accurate performance tracking and course correction [39].

Lean and agile approaches also drive organizational productivity and efficiency. By focusing on the most impactful activities and minimizing unnecessary bureaucracy, these methods reduce wasted effort and enable quicker implementation cycles. Collis and Rukstad [16] argued that an effective strategy is not about doing more but about making deliberate choices. Agile planning embodies this principle through prioritization and iterative execution. Agile planning also creates more inclusive and participatory strategic processes, giving employees greater ownership of outcomes. Empowered teams are more motivated, innovative, and committed to executing the plan [27]. When paired with a culture of psychological safety, this inclusivity encourages risk-taking and experimentation, which are essential for innovation and long-term adaptability. Ultimately, lean and agile planning enhances organizational resilience. By embedding continuous learning, feedback, and adaptation into strategic processes, organizations develop the capabilities necessary to navigate disruption and emerge stronger. Agile planning allows for rapid scenario testing, real-time risk management, and faster recovery from setbacks, all of which strengthen the long-term strategic position [10].

X. CONCLUSIONS AND FUTURE DIRECTIONS

The shift from traditional to agile strategic planning is more than just a change in method; it reflects a fundamental rethink of how organizations handle complexity, change, and opportunity. As this article has shown, lean and agile approaches provide practical, evidence-based alternatives to outdated models that often hinder responsiveness, drain resources, and limit innovation. Agile strategic planning encourages a dynamic balance between long-term vision and short-term actions. Built on clarity, focus, and action frameworks and guided by core organizational change theories, it helps organizations simplify planning, stay aligned with changing conditions, and empower teams through shared leadership and cultural support. The use of feedback loops, adaptive governance, and iterative decision-making transforms planning into a strategic skill that supports ongoing learning and resilience. Leaders who adopt agile methods are likely to be more effective at fostering psychological safety, sparking innovation, and maintaining strategic alignment within complex

organizations. In today's fast-changing business landscape, successful companies demonstrate clarity, agility through quick pivots, adaptability via evolving strategies and structures, and responsiveness to immediate challenges. All three qualities are distinct yet interconnected, collectively ensuring sustained strategic alignment. To succeed, modern strategic planning must be both lean and agile.

Future research should empirically test the clarity-focus-action framework in diverse organizational settings to evaluate its effectiveness, identify practical challenges, and measure outcomes. Methods such as case studies, surveys, and quantitative analyses would provide critical evidence of the framework's applicability. Additionally, studies should examine how traditional frameworks, such as Lewin's model, Kotter's eight steps, and the McKinsey 7-S model, align with contemporary agile practices, assessing their limitations, contextual relevance, and potential adaptations for dynamic environments. It is equally important to explore how the clarity-focus-action framework may need to be tailored for specific sectors, such as manufacturing, services, public institutions, and non-profits, each with unique operational and regulatory demands. Furthermore, research should investigate how organizational size and resource constraints influence the practical adoption of agile strategic planning, highlighting differences between small enterprises and large corporations. Another vital area for inquiry is understanding strategies for overcoming barriers to agile planning, including cultural resistance, leadership misalignment, and operational inertia, with emphasis on change management techniques, leadership development, and cultural transformation. This manuscript serves as a conceptual synthesis grounded in established theories, assuming that the clarity-focus-action framework offers practical value across various contexts. While it does not involve new empirical testing, it provides a sound theoretical basis for future empirical research to validate, adapt, and refine its practical applications.

CONFLICT OF INTEREST

The author declares no conflict of interest.

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