

Strategy finder

GUIDE - GETTING STARTED
PARTICIPANT ACCESS

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Strategyfinder
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Getting Started: Participant Access

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Getting Started with *Strategyfinder*: Participant Access

This manual provides guidance on setting up users (workshop participants) and SuperUsers.

You may have just been given access to Strategyfinder: either as a purchaser or as someone with access to someone else's Strategyfinder. In either case, you will have been given access via a given email address and password.

You will have been given access either as an Administrator or as a SuperUser (if, as a purchaser, you have been given access as a User - Participant - ask to have your access changed to SuperUser so that you have access to all the functions of Strategyfinder).

This manual works in conjunction with 2 other manuals: Strategyfinder - The Basics manual and Strategyfinder - Getting Started (with an example).

Types of Users

Administrator

These users have full control over a Strategyfinder server. In particular, they can create Users and SuperUsers and change passwords. They can also deactivate Users. They can do everything a SuperUser can do.

SuperUsers

These users can create models and use all the Strategyfinder capabilities to edit a model. They can create users, add users to a model, change the editor of a model.

SuperUsers are typically the facilitator/manager of a workshop. Although sometimes a SuperUser may be an observer who has all of the capabilities of a facilitator.

Users

Users are participants in a modelling workshop. They have limited control over Strategyfinder processes and can only access models that have been assigned to them by a SuperUser or Administrator.

Editors

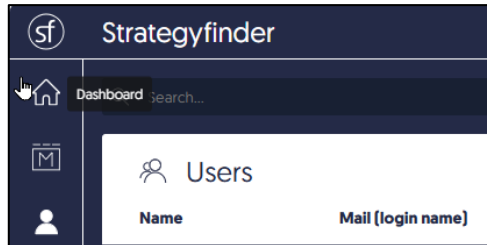
A SuperUser can transfer some control of the model to one of the participants (an Editor), who can then transfer control to another User (a Participant).

SuperUser Setting up a User (participant)

If a User is already registered on a Strategyfinder server

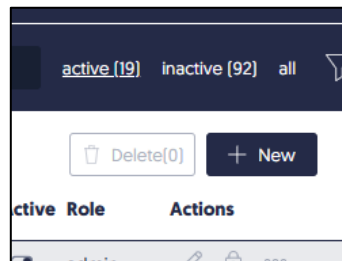
They will appear in the Users list either as an active User or inactive User:

Select the User icon and a list of Active Users will appear.



Users can be listed by first name or email.

If a User cannot be found it may be because the User has been made inactive. Select 'inactive' at the top right to view a list of inactive users, or select 'all' to view all registered Users:



If a User is active then they can be attached to a model (see below), if they are inactive they can be switched to active.

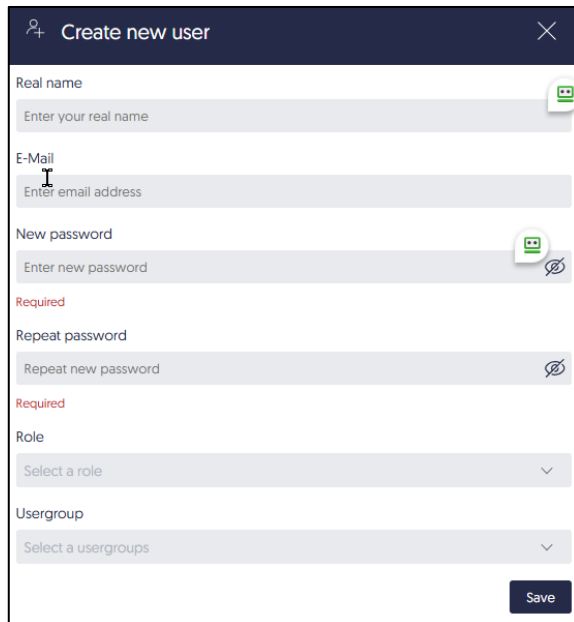
If a User is NOT already registered on a Strategyfinder server

Then they will need to be registered or invited as a User (participant).

Registering a new user

Select the User icon on the left

Click on 'New' at the top right (see above). The 'Create new user' box will appear:



Fill in the form and click 'Save'.

NOTES:

'Real name' can be any set of characters you wish to use to identify/search the user.

'E-mail' does not have to be a real email address, but of course it usually is.

'Password' is usually something very simple as the User will be able to change it to their own choice if they wish.

'Role' and 'Usergroup': both entries will be the same. A SuperUser can only setup other SuperUsers (if the licence allows it) or Users (possibly a limited number based on the license), while an Administrator can also setup Administrators.

For example:

Here a User will be invited to use the login details of 'realname@anything.net' regardless of their actual email address.

Inviting a new User to a Model

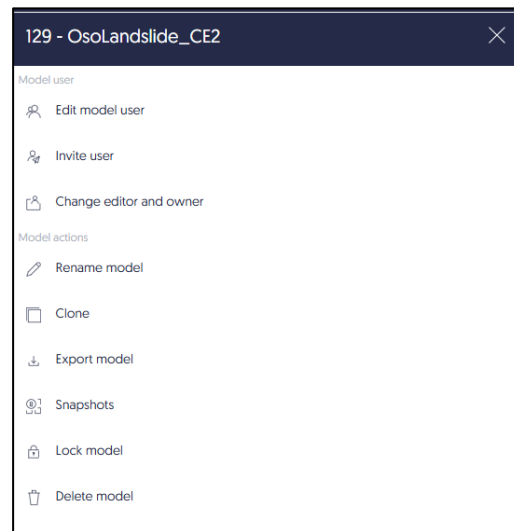
Select the Model icon and a list of models will appear:



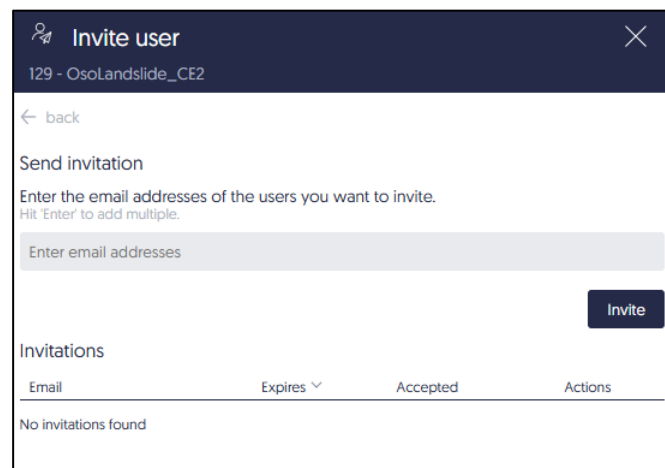
Click the three dots to the right of the name of the model you want to invite the User to open (under 'Actions' (note that a model must already have been created):

| Edited | Actions |
|-------------------|---------|
| 2024-09-21, 11:36 | 🔒 🗑️ ⋮ |

This will open the options for that model:



Click on 'Invite user':



In this case a real email address must be used as Strategyfinder will send an email to the user.

After clicking 'Invite', the User will receive an email with an invitation containing a URL to click on. When the user clicks on the URL, Strategyfinder will open and the participant will be invited to log in with their email address and a password of their choice. Once logged in, the model they have been given access to will be listed and clicking on the model name will open the model.

Once a user has accepted an invitation, they will remain an 'active' User unless deactivated by a SuperUser or Administrator. Once a user has accepted an invitation then they will remain as an 'Active' user unless they are deactivated by a SuperUser or Administrator.

CATALOGUE

STRATEGYFINDER MANUALS AND GUIDES

MANAGING THE SOFTWARE PLATFORM

Strategyfinder CASE EXAMPLE - TEAM SOLUTION FINDING

ISBN 978-3-903556-15-7

Shows how a real 45min workshop unfolded to enable the group to develop a consensus around a portfolio of actions. Worth looking at before reading other manuals.

Strategyfinder - GETTING STARTED

ISBN 978-3-903556-01-0

This is the best manual *when using sf for the first time*. It takes you through a single user brainstorming session: including entering statements, linking them, using categories, and some simple but useful analyses.

Strategyfinder – THE BASICS

ISBN 978-3-903556-02-7

Introduces Strategyfinder: functionality, analytical capabilities, main strengths. Goes through what all the icons do: settings, entering statements and links; categorising statements; evaluations – rating and preferencing; analysis; managing views; archiving, synchronisation and export/import.

Strategyfinder –EVALUATION RATING AND PREFERENCING

ISBN 978-3-903556-06-5

An important and very useful feature of Strategyfinder is the ability use two different types of evaluations: rating and preferencing. These enable all participants to evaluate statements in a variety of ways and for the facilitator/leader to gain a sense of the degree of consensus within the group. This manual provides detail of how-to setup rating and preferencing evaluations.

Strategyfinder – GUIDE - GETTING STARTED: PARTICIPANT ACCESS

ISBN 978-3-903556-17-1

Describes the different ways of giving participants (and others) access to a Strategyfinder model.

Strategyfinder – ANALYSIS TOOLS

ISBN 978-3-903556-03-4

Introduces all the analysis tools available, with examples.

Strategyfinder – BACKGROUND THEORIES, RESEARCH AND CONCEPTS

ISBN 978-3-903556-00-3

Presents the background, research, and concepts to the development of Strategyfinder and the associated methods over the past 40 years. The methods have been in use in a wide range of organisations across the world for several decades and these experiences have provided an important research base for the development of the software and methods.

STRATEGYFINDER PRIMARY USES - METHODS***SYSTEMIC RISK MANAGEMENT***

Strategyfinder tool and method is the only known way of acknowledging risk as a system of interconnected risks. The method has been particularly successful in major project risk management and pandemic risk management, as well as many other messy risk situations.

Strategyfinder - METHOD - SYSTEMIC RISK ASSESSMENT AND MANAGEMENT SUMMARY

ISBN 978-3-903556-11-9

Capturing risks and showing causal links models a risk system. This manual shows, in summary, the process for constructing the model of the risk system and developing effective risk mitigation strategies and action programmes.

Strategyfinder - METHOD - SYSTEMIC RISK DETAIL

ISBN 978-3-903556-07-2

Shows, as a step-by-step guide, all stages of the process for constructing the model of the risk system, conducting appropriate analyses of the system, and developing effective risk mitigation strategies and action programmes.

STRATEGIC MANAGEMENT

These set of manuals show different aspects strategy making. Each method can be used independently of others, however together they work a portfolio of highly important parts of strategic thinking and strategic management.

Strategyfinder – METHOD - TEAM STRATEGY FINDING SUMMARY

ISBN 978-3-903556-10-2

Strategic management needs to be practical and capable of implementation. Thus, it must address the key issues the organisation faces in creating strategic success. This method has been used extensively by top management teams in many countries and many industries in public/not-for-profit organisations as well private/for-profit companies. It is based on a series of 4 half day workshops with the members of the management team connected to Strategyfinder from the own chosen location.

Strategyfinder – METHOD - TEAM STRATEGY FINDING DETAIL

ISBN 978-3-903556-09-6

Shows, as a step-by-step guide, all stages of the process for strategy development and the creation of agreed strategies and action programmes.

Strategyfinder – METHOD - DISCOVERING AND EXPLOITING COMPETITIVE ADVANTAGE

ISBN 978-3-903556-12-6

Competitive advantage is known to follow from exploiting distinctiveness, and distinctiveness comes from understanding and exploring the network of distinctive competences and distinctive assets. This method shows how to discover and explore distinctiveness and so develop effective strategies to exploit and develop competitive advantage. The method has been used not only in the commercial sector but also the public sector (including police forces, health service, etc).

Strategyfinder – METHOD - STAKEHOLDER MANAGEMENT

ISBN 978-3-903556-08-9

A crucial part of any effective strategy or problem solution is understanding the responses of key stakeholders and developing strategies to manage them. Stakeholders are often a social and influence networks with various levels of power and interest in managing their own responses to your strategies and solutions. This method uniquely helps develop effective stakeholder management.

There are also brief manuals available for using Strategyfinder to help manage strategy delivery and monitor progress, and also some effective ways of presenting an agreed Strategyfinder strategy. In addition, organisations often favour starting strategy making with a SWOT analysis – Strategyfinder is very effective at moving a SWOT analysis to strategy development. These guides/documents are available on request.

TEAM SOLUTION FINDING – MANAGING MESSY AND COMPLEX PROBLEMS**Strategyfinder – METHOD - TEAM SOLUTION FINDING**

ISBN 978-3-903556-13-3

Many, if not most, organisational problems are a system of interacting issues that have soft as well as mathematical relationships. This method enables the ‘owners’ of the problem, as well as possible experts able to help suggest solutions, to get together to understand the systemic nature of the problem and so develop an effective and practical solution. Significantly the participants need not be in the same location and are able to bring together a team perspective and to co-create a jointly owned systems view. With this method and Strategyfinder there deliberations can be fast and highly productive (see the example real case: ‘Strategyfinder – a real case example of team solution finding in 45min).

The Strategyfinder 10min video shows how a manager was able to get the views of his team, without the need for a meeting, prior to attending an important meeting (see YouTube “Strategyfinder Briefing Workshop@).

When analysts address problems by constructing mathematical models or simulation models it is crucial they understand the nature of the problem as seen by those who will have the responsibility to implement any solution. This method enables analysts to undertake fast problem construction with the client group. (24pp)

The manual assumes familiarity with Strategyfinder – the getting started manuals.

OTHER TRIED AND TESTED USES FOR STRATEGYFINDER

Strategyfinder – REVERSE ENGINEERING TEXT INTO A STRATEGY MAP

ISBN 978-3-903556-23-2

Reverse engineering a published mission statement/strategy statement can provide a good to revisiting strategy development. It can also ‘test’ a mission/vision statement for thoroughness and logic. This method helps gain clarity in understanding a report/documents(s). The manual illustrates the process using a published mission statement and provides a set of ‘rules’ for reverse engineering.

Strategyfinder – ESTIMATION USING AN ADAPTED DELPHI TECHNIQUE

ISBN 978-3-903556-14-0

A range of experts in the estimating topic produce independent estimates of the likely cost of a new and probably complex project (using the rating facility in Strategyfinder), they then explain the key factors that impacted their estimate (using the ‘blind gather’ facility in Strategyfinder), everyone now re-estimates in the light of knowing these factors, and the process is repeated until the range of the estimates gets smaller and the average and median moves to what can then be regarded as the best estimate. An important outcome is a range of possible risk factors and factors crucial when undertaking the traditional estimating.

Strategyfinder – METHOD - BRAINSTORMING ISBN 978-3-903556-04-1

Brainstorming can easily be done using ‘sticky-labels’ on a wall, however using Strategyfinder can offer benefits of i) anonymity and so opening up possible ideas that would not surface otherwise, ii) show causal, or other, connections between ideas, and so iii) analyse the structure the inter-related ideas, iv) use categories to help see different characteristics of ideas, v) undertake anonymous evaluations of the ideas against a variety of criteria. This manual describes a simple process for doing brainstorming.

Focus Groups

The Team Solution Finding and Team Strategy Finding methods each provide a basis for fast and highly effective focus group work. With Strategyfinder, participants in the focus group can be located anywhere with an internet connection. The early stages of these methods offer little more than other ‘whiteboard’ software. However, Strategyfinder allows for causally connecting statements from participants, and most importantly both during and after a focus group workshop the material can be analysed in a variety of ways.

In addition, the methods allow for the focus group to go beyond expressing view and the linkages. The group can be facilitated to providing their own agreed solutions.

FACILITATOR GUIDES

Strategyfinder – GUIDE - MULTI-ORGANISATION COLLABORATION GUIDE

ISBN 978-3-903556-16-4

Based on extensive experience, the guide introduces a range of issues to pay attention to if using Strategyfinder for Multi-Organisation Collaboration when faced with messy problems, or the need to construct a joint strategy, when an input from a collaborative multi-organisation group is required.

The Strategyfinder Team Solution Finding and Team Strategy Finding methods are particularly effective for addressing ‘Grand Challenges’ and ‘Future Shocks’. These require commitment from many organisations agreeing to work together. Many features of Strategyfinder methods help: high group productivity, anonymity when appropriate, able to explore degree of consensus on potential agreements, and participants can join from their own organisational location.

Eden, C., Paulsen, S., Gonzalez, J. 2024. Breaking the Cycle in Norway. In Resilience in Action. IBM Institute for Business Value (accessible from IBM web site) provides a brief summary of multi-organisational collaboration in Norway. And, Ackermann, F. 2024. Managing grand challenges: Extending the scope of problem structuring methods and behavioural operational research European Journal of Operational Research 319, (2), 373-383 discusses some of the issues.

Strategyfinder - GUIDE - IDENTIFY AN OPTIMUM GROUP OF PARTICIPANTS

ISBN 978-3-903556-05-8

Getting together an optimum group of participants is important for all strategy, risk, solution finding workshops. Ensuring both an adequate range of expertise is represented and crucial power-brokers (implementers) are present is crucial. This guide uses Strategyfinder to help with the identification of the best group of participants and helps with getting the group size to a reasonable level.

Strategyfinder – GUIDE - FACILITATION NOTES

ISBN 978-3-903556-22-5

This guide provides a set of notes about the role of a facilitator/leader/manager when using Strategyfinder. A workshop checklist is provided. The guide also includes suggested further reading.

THE STRATEGYFINDER WEBSITE

<https://www.Strategyfinder.com>

The web site provides a variety of video support.

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