Strategy finder

THE BASICS

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Strategyfinder - The Basics

Contents

Introduction to *Strategyfinder*

There are a series of manuals, some of which provide guidance in different facilitated workshops that each use a *Strategyfinder* method and can be obtained on via mail@Strategyfinder.com

'USING STRATEGYFINDER' MANUALS

'STRATEGYFINDER WORKSHOP' MANUALS

Introducing Strategyfinder

Strategyfinder is a Group Support System (GSS) developed to create a systemic strategy for carefully selected representatives of an organisation or multi-organisational group addressing complex and messy problems. It is software for collaboratively working on, for example, messy problems, strategy, and risk management over the internet. It uses a process and set of 'rules' that have been developed over 30 years in face-to-face working with management teams. The focus of the process is to explore causality –means-ends – so that agreed action is negotiated with a full understanding of expected outcomes and ramifications.

Strategyfinder is particularly helpful in situations where the complexity is, in part, attached to differing perspectives. *Strategyfinder* allows each participant to be adding their own views to the growing risk system via their own laptop/tablet at the same time, thus increasing productivity as well as providing all participants the fullest opportunity to ensure their own views are represented. The participants add links between the views representing causal influences, which often lead to discovering feedback loops (vicious and virtuous cycles and controlling feedback). *Strategyfinder* has powerful analysis tools to detect loops and find the parts of the system that are most central. *Strategyfinder* serves two purposes: collecting and organising knowledge as causal network and analysing the causal network to produce systemic strategies.

The approach used allows participants to directly (and anonymously) enter their views through the laptop/tablet that is in use for the video conference. The individual contributions are simultaneously collected and displayed on each of the participant laptops. The facilitator works with the group to help ensure that the different individual perspectives are structured to reveal significant causal chains of argument that allow for further reflection, extension, and debate amongst group members.

The approach also allows individuals to express priorities/importance etc with respect to the risk system. In this way the degree of consensus about aspects of the risk system can be evaluated.

Some of the advantages of using *Strategyfinder* are:

- It allows members of a group to appreciate differing perspectives and helps to generate constructive dialogue and debate.
- By enabling users to enter information anonymously, it facilitates blunter, and more pointed, comments about what are root causes of the problem without the interpersonal issues that can sometimes mean these are never discussed. Thus, it assists in removing barriers to individuals expressing a view through fear of the consequences of being seen to hold that view.
- The software platform enables a large number of views to be worked with by the group, hence lending itself to understanding and managing complex situations where there are a wide variety of factors impacting on the end outcomes.

The system is seen as a causal structure.

Main purpose:

The list of manuals shows the common uses for Strategyfinder.

Functionality:

- statements are entered by any participant and can be edited by the participant

- when a statement is edited the edited statement is used throughout all views on which that statement appears: somewhat like a relational database where all statements are stored in one place and thus when edited are changed in the database
- similarly for all causal links, for example if a link is deleted in one view of a sub-system of the total causal map then it will be deleted everywhere else the arrow was used
- single user (driven by a manager/facilitator) and multi-user (participant driven) modes of interacting with the emerging strategy model
- ability for participants to do anonymous evaluations/prioritizations (for example, rating and preferencing) and review the results (turn on and off) enabling the degree of consensus to be viewed
- allows for easy navigation of complex (detailed) models
    - creation of a practically unlimited number of views (windows onto the model's contents) and statements/links
    - colour coding of statements using a default strategy making category set: goals, strategies, central, option, actions, default
    - alternative category (colour) sets can be created, and category fonts can be edited as required
- control, of the process (facilitation) can be transferred to another participant

Analytic capabilities:

- analyses can be carried out at a local (view of the model currently being explored) level or at macro (whole of model) level
- enables the identification of potency of actions with respect to goals
- identifies the centrality (core) of statements via calculating the number of links in and out of each statement, and closeness and betweenness
- finds feedback loops – dynamic behaviour - very rapidly i.e. millions of loops in seconds, and identifies 'most potent' loops and statements in loops (those that if strategically managed are likely to have the biggest impact)
    - highlights statements in a chosen loop statements automatically for easy visualization
    - can automatically produce a view of a chosen loop
- provides other means for identifying centrality: social network analyses - closeness and betweenness (for stakeholder analysis, but also other uses)
- summarise map onto key statements in map with paths between key statements found
- highlights all the influences or dependences from a selected statement
- authorship of statements available to the facilitator (as a default setting this function is turned off for full anonymity)
- use of AI to develop a draft report based on the goals/strategies/actions summary structure
- and others…

Main strengths:

- takes a team from consideration of major strategic issues through to agreed and consensual strategy comprising goals, strategy with action packages through to strategy implementation progress monitoring
- based on an established theory of negotiation
- browser-based, so no software or app to be downloaded to the local machine
- editing statements and links where any change to a statement or causal link is reflected instantly everywhere in the model (every view) and for all participants
- high security – browser based with server locally established or use of a server at *Strategyfinder* base location with tight security of all data

Section 1: *Strategyfinder* – the basic basics

Users

There are 3 categories of people with access to *Strategyfinder*: Administrators, SuperUsers, and Users. Administrators are not available on some purchased versions. Administrators (A) are managers/owners of the *Strategyfinder* system. SuperUsers (SU) are usually facilitators. Users (U) are participants in *Strategyfinder* workshops and only have access to those models to which a SuperUser has permitted.

A SuperUser (SU): FACILITATOR/MANAGER/LEADER has full rights:

- can create Users,
- invite Users to a model,
- change all aspects of a model

A User has restricted rights and is a participant in a workshop/meeting.

However, control of the process (facilitator) can be transferred – through a change of 'editor'.

Server:

{server}.strategyfinder.com (depending on which server you have access to: where *{server}* is the name of your server)

Browser:

Strategyfinder works with most browsers, for example Firefox, Edge, Safari, Brave, Chrome.

Basic browser settings

The following are helpful for users to know about:

F11 to use full screen (F11 again takes back). Ctrl/– and Ctrl/+ to size screen

Screen size

For best visibility of the model developed it is advisable to use a large computer screen/monitor. In other words, if possible, add an external larger screen to your laptop.

However, the zoom (scroll wheel) and pan (mouse right click) work effectively to allow a focus on a particular part of the causal network.

Password:

All users can change their password at any time – after logging on go to settings (top right – next to user name)

3 Basic *Strategyfinder* icons – click :

Dashboard shows recent models and option to create a new model. It also provide information about 'Release notes' and 'Manuals' available for your version.

Models lists the models on this server associated with the user logged in. When an Admin is logged in then all models can be seen. When a SuperUser is logged in then only the models 'owned' by that SuperUser are shown. Similarly a User sees a list of only the models they have been attached to.

ONLY an Admin can change the Owner of a model. Log on as Admin and an icon appears to the left of 'Owner'. Click and options for owner appear – possible owners will only be from the list of those Users attached to model.

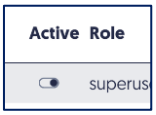
Note that model has an identifier other than name: ID number – this model number appears in URL when model is open.

Categories: this icon ***only shows when logged in as an Administrator***. Unless new categories have been created the list shown will only be of the default categories and these cannot be edited.

User shows list of all users attached to this server. Users are either Active or Inactive

Turns off the inactive/active filter

In the above screen shot we see that there are 23 active users and 59 inactive users. Active users are able to access the models they are attached to, inactive users cannot do so. Active users can be made inactive and vice-versa using the switch:



Note that **Users will only see**:

Models options (only available to a SuperUser or Administrator)

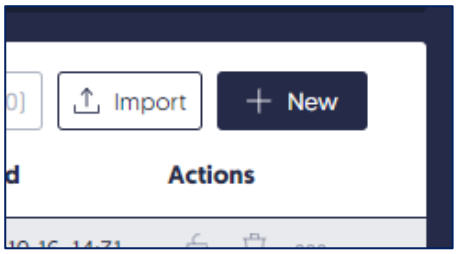
Use an existing Model:

From the list of models you have the right to access
or the list of Recent models (from 'dashboard'):

Click on the model name, or the icon to the left of the model Owner

Create a New Model:

To create a new model go to the '+ New' at the top right.



'Import' is used to import models exported from another server.

The blank *Strategyfinder* 'Default' view/tab will appear.

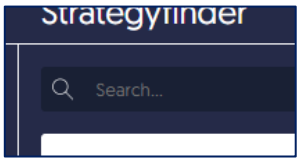
It is important to **rename this new model**, otherwise lots of models will be on the server all called 'Model'. To do this ***at least one statement must be in the model***.

To rename model:

The model can be renamed from the Models list: hover over model name and a 'pencil' appears to the right of the model name; click the 'pencil' and change the model name. **Do NOT use special characters in the model name (eg +, -, ., &, $, !, etc).**

Alternatively, if in the model, then go to the 'sf' icon at the top left and on the drop down menu choose the icon second from the top:

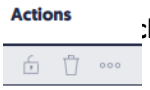
Search model by name: use the search option



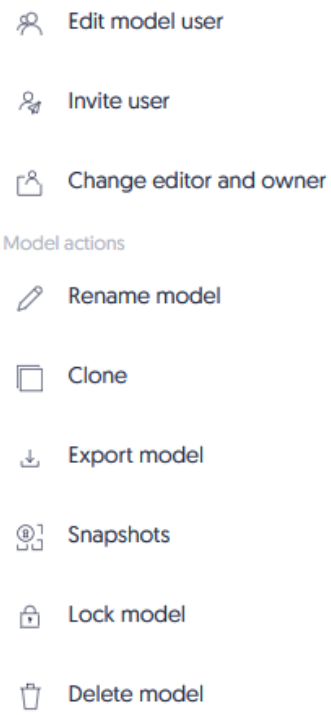
Other Model Options

Change model owner and/or **Editor** (an Editor has the right to change the model as if SuperUser)

Select from 'Actions': Edit model user, Invite user, Change editor and owner, Rename model, Clone model, Export model, Snapshots, Lock model, Delete model

Are all available using the ellipsis at the end of a model listed 

click



Edit model user (also see above): adds or subtracts users from accessing the model

Invite user: sends an email invitation for a user to access the model. An invitation can only be sent to a non-registered user. This option also shows all users that have **already been invited** to the model.

Change editor and owner (also see above): an editor can use the model as if SuperUser. This is particularly useful when a group has created a model and the facilitator wants to give access to a participant after the workshop, so that they can check/edit/correct/add. The new Owner or Editor MUST be registered to use the model.

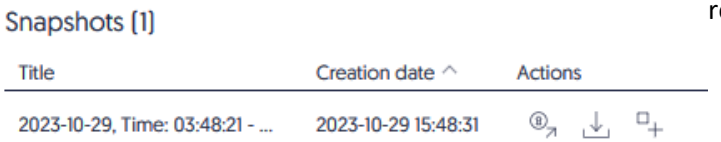
Rename model (also see above for initial naming of the model). The model can also be renamed from the Models list: hover over model name and a 'pencil' appears to the right of the model name; click the 'pencil' and change the model name.

Clone model: takes a full copy of the model. Useful to enable playing with a model without changing the original.

Export model: to a SF .json file for importing on another Sf server; as a text (.txt) file to be used in, for example, WORD EXCEL – the file lists all statements and links; to *Decision Explorer* (an alternative mapping software). The exported file appears in your 'downloads' folder. This is an effective way of archiving models.

Snapshots: a snapshot of a model is a 'read-only' copy. It is useful when participants are allowed access to a model for review but are not permitted to change the model. It is also useful as a record

of a model at break points during a workshop (eg a coffee break). Thus, keeping a history of model developme reate a new model from the Snapshot



Lock the model (also available under the direct options for a model): so that 'Users' of this model cannot change it until unlocked, but they can view it.

Delete model [only a Superuser or Admin can delete a model]

User options (only available to a SuperUser or Administrator)

For an Administrator the list shows all SuperUsers, Users and Administrators. Administrators have all privileges – they are able to create SuperUsers.

For SuperUsers the list shows Users and SuperUsers that are registered with the SuperUser models.

Superusers can create new SuperUsers and Users (limited by the version of Sf that was purchased). SuperUsers can delete Users but cannot delete other SuperUsers.

SuperUsers/Users may be 'active' or **Active**'.

SuperUsers/Users who are inactive can be made active and so attached to a model. If a User/SuperUser is not active then they cannot be attached to a model.

If it is not possible to attach a known past User to a model then it may be that they are currently inactive, and so the User will need to be activated. A SuperUser is able to see whether a User is Inactive or Active.

When facilitating (as SuperUser) it is useful to also be logged in as a User to be aware of what participants in the workshop are seeing. When logged in as both SU and U u**se a different browser for each or a different computer** or, if using Chrome, then open an **'incognito'** version (three dots top right). If logged in for both roles then required to actively participate as a user in a small number of activities (for example, what are referred to as 'rating' and 'preferencing' activities).

As a Superuser use 'create new' to **create yourself as a User(s)** (MUST be **with a different email address** to that used for SuperUser), but can be the same password as for SuperUser (which means you are less likely to forget passwords!).

Typically SuperUsers use 'name SU' and 'name U' (for example: JamesSU and JamesU) as identifiers on the user list to help find themselves!

Section 2: After opening a model – settings, entering statements and links

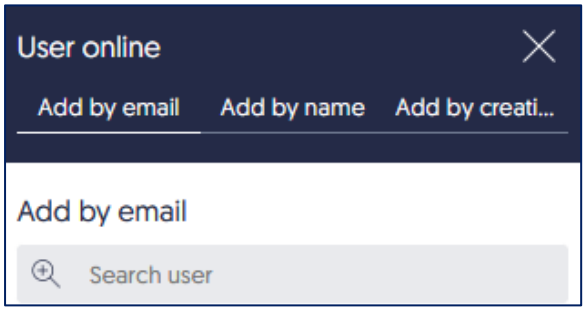
The top level of icons are clustered according to different parts of typical workshop:

The Model Settings menu

When in a model click the SF icon  . Clicking this icon (top left) opens a drop-in settings menu.

The drop-in menu enables a SU to set up their basic wishes as a facilitator – usually prior to a workshop.

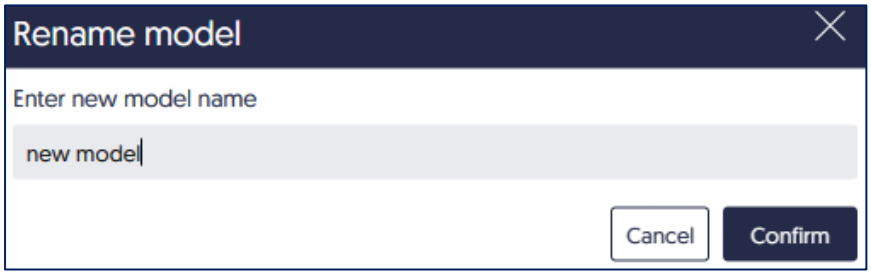
The first down from the top  enables the ***attachment of users to the model***, and to show the user currently on-line. Other Users can be attached to the model by email, name, or creation.



When facilitating the manager/leader may wish to log in as both 'SuperUser' (as facilitator) and 'User' (participant), so that you are fully aware of what a User is seeing. When doing so it is best to use a separate laptop connected as 'User'.

The second icon from the top: 

permits ***renaming of the model***. Note that a model name cannot be changed until at least one statement has been added to the model. Once a new model has been established (requires at least one statement) then rename the model from the default name 'new model' so that there is no confusion with other models:

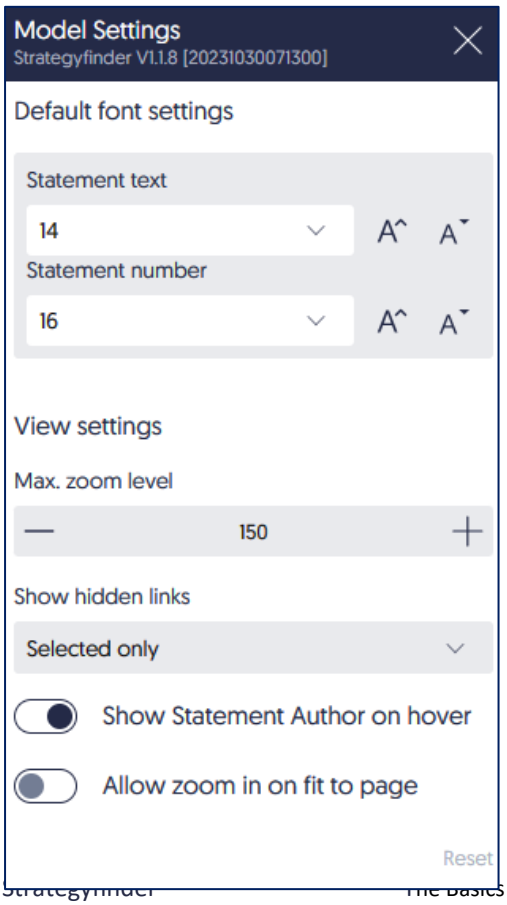


The third icon from the top enables a '*snapshot*' of the model to be taken .

A 'snapshot' of the model creates a 'read-only' version of the model at the time the snapshot is taken. This useful for keeping a record/history of the model development. Thus, it is usual to take a snapshot at the end of each session in a workshop (for example, at a 'coffee' break).

The fourth icon from the top enables *export of the model* to a SF .json file for importing on another Sf server; as a text (.txt) file to be used in, for example, WORD EXCEL – the file lists all statements and links.

The *model settings* icon (almost at the bottom) allows changes the default font size for each of statement text and statement number as well as setting the default zoom level and default setting for seeing or not unseen link arrows.



The settings menu is straightforward except for 'Show *Statement Author on hover*' and 'Allow zoom in on fit to page'.

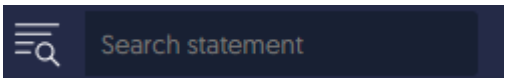
Strategyfinder permits the facilitator to hover over statement to see the authorship of a statement. The switch turns this option off or on (the default is off). Anonymity or not is both a practical and ethical issue. For a facilitator it is very helpful to know whether clusters of statements have been dominated by one participant. This setting can be changed during a workshop, although a *browser refresh will be required* for the change to be implemented.

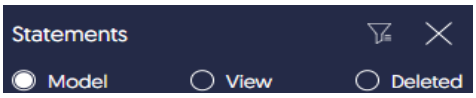
'Allow *zoom in on fit to page*' – this option makes the statements fit to the screen and so, for example, when only one statement then this will fill the screen. This option can be helpful if any Users are using a poor resolution laptop or a tablet. As more statements are added then the screen will automatically add these to the screen and so the statements get increasingly smaller.

The final icon in the main list  *closes the model* and returns to the model list and also allows logout from *Strategyfinder* (top right). This icon is used often in *Strategyfinder* and usually indicates a return to the previous activity.

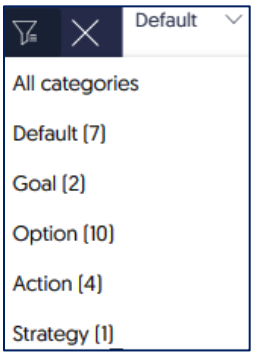
Model Control Icons – at the top

The icons are clustered as follows, and those with a chevron create drop down menus:

List and Search 

The list 

can show all in the model, all on the current view, and those deleted. Selected statement will show with an ALL grey background (Goals show wu=ith a grey background to the text only).

Statements can be listed by category by using the funnel/filter: 

Note that listed statements can '*Edit statement*' in list or '*Bring statement*' to the current view using one of the 2 icons next to the text:  Using the left icon brings the statement to the current view. If there is no 'Bring statement' icon then it means that the statement is on the current view.

'*Search statement*' allows search by number and/or any text.

Mapping cluster of icons: entering statements, changing the map format, 'blind gather', and working with tabs/views on the model: 

Analysis cluster of icons: categorise, evaluate, and analyse: 

Control the screen/view:

fit the map to the screen size '*fit to view*': 

'*reset view*' after, for example, seeing the results of analyses (eg 'collapse'): 

Entering statements

Any User/SuperUser can enter statements by double clicking anywhere in a view (the model opens with a tab/view labelled 'Default'), entering some text and hitting the 'enter' key. The statement is given a reference number. The reference numbers are in the sequence that statements are entered.

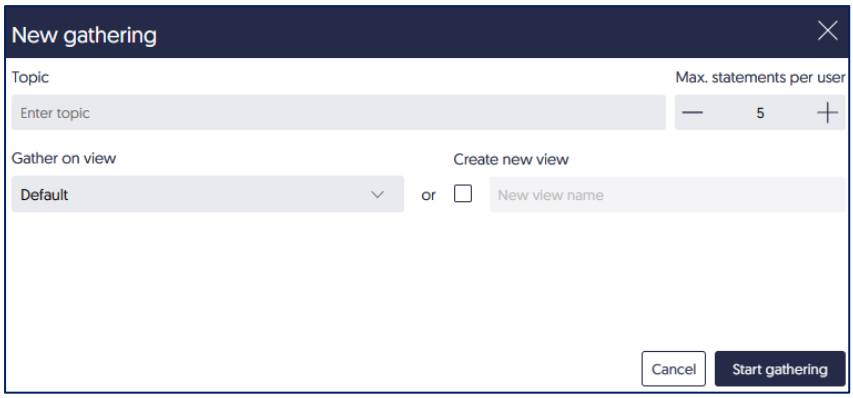
NOTE: a model cannot be given a name until at least one statement has been entered.

Blind gather

A SuperUser can setup the gathering of statements where Users are blind to the contributions of other Users.

The SuperUser sees all contributions.  This is called 'start new [blind] gathering'. When the 'eye' is open then gathering occurs 'in public' where users enter statement directly on to a tab/view. When the 'eye' is closed then statement are entered via the 'blind gathering' mode.

The process of 'start new gathering' (blind gathering) is determined by the SuperUser:

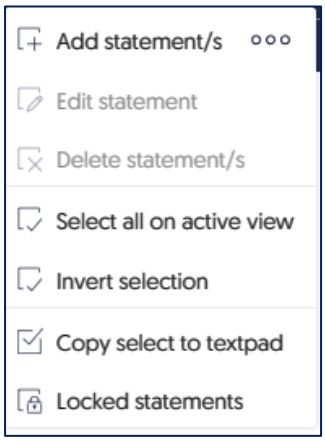


Note that the SuperUser can set: which view/tab the statements will be gathered on (and this could be a 'new view' created on request); and set the maximum number of statement that a User can enter. Once 'start gathering' has commenced the SuperUser sees the statement being entered and can organise them and/or edit them.

Note that the 'eye' icon turns red while blind gathering is active. The SuperUser stops the 'blind gathering' by clicking the 'eye' icon.

Gather statements by text input

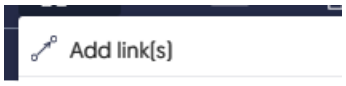
Statements can also be added from the 'statements' icon  and then 'add statements.



Linking statements

Hover over the statement number. A rotating dashed circle and cross appear. Hold the mouse button down, and move the mouse over the top of the statement that is to be linked (an arrow follows the mouse). Unclick the mouse button.

A causal link can also be added using an ‘x+y’ method, where 12+ 63 provides a link FROM statement. 12 TO statement 63. This is done via the ‘mapping’ icon  and then ‘add links’



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Panning/Moving and Zooming the map on a view

The mouse wheel will zoom the map in and out. The map will focus on that part of the map on which the mouse was positioned before zooming.

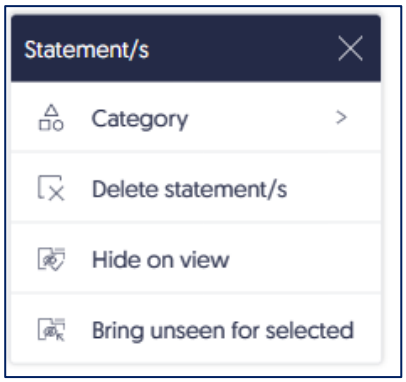
The map can be panned/moved around the view by clicking the right mouse button and moving the map.

However, note that clicking  will re-centre the map on the screen.

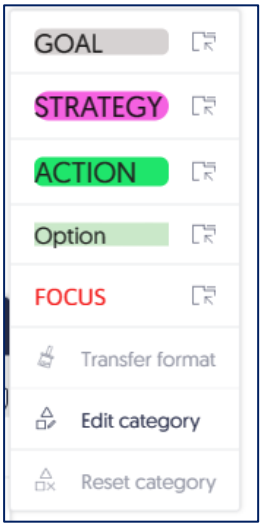
Section 3: Categorising Statements

Statements can be categorised against a set of preset font styles. These categories are those used in the Strategyfinder method manuals about strategic problem solving, strategy development. Systemic risk management.

Right click on the statement to be categorised.



Click 'Category'.



Click the category required.

The category 'FOCUS' is intended to mark a likely temporary stattement that is a focus of attention – often a central statement or potent statement, etc.

'*Transfer format*' allows several statements to be given the same category. Riight click on a statement that is coded with the category to be used for other statements. Click 'Transfer category' and then click other statements to be given that category.

'*Reset category*' turns any selected statement back to the default font. This can also be done by swiping across those statements to be reset – this makes them selected (red flashing border) - and then right click on one of the selected statements, choose 'category'/'reset category'.

Section 4: Evaluations: Rating and Preferencing

Detailed instructions and advice on the use of the rating and preferencing evaluations can be found in the '*Strategyfinder – Evaluation Using Rating and Preferencing*' manual.

A selection of statements can be evaluated (for importance, impact, practicality, etc) using a rating scale or preferencing scheme.

The *rating* allows the SuperUser to set a scale against which statements are rated.

The *preferencing* scheme allows up to 3 colours of 'sticky blobs' to be allocated to statements.

Other *Strategyfinder* manuals provide more detailed instructions on their typical use.

However, the following provides a basic guide:

Setting up and using rating – the basics

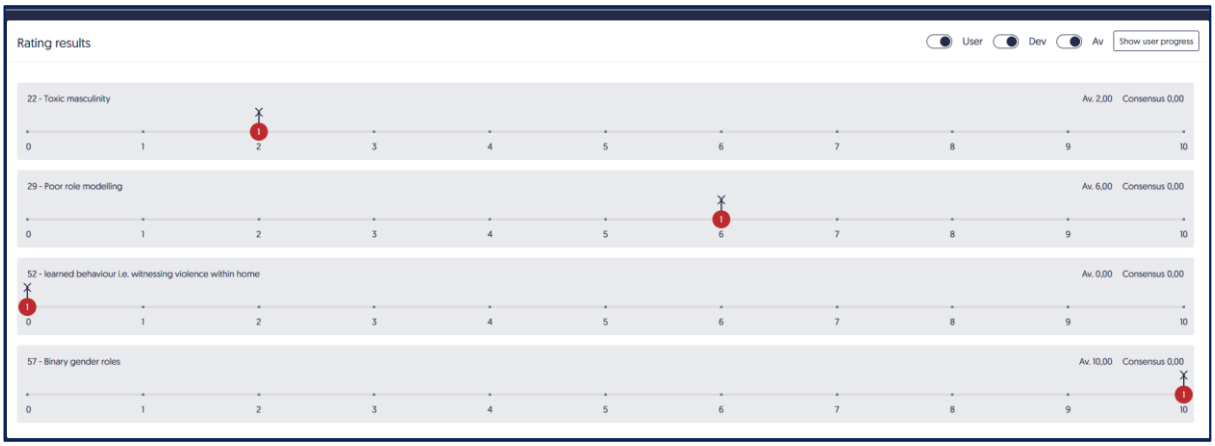
Click on '*Setup rating*' ooo

The default settings show a rating range of 0-10 at intervals of 1. This scale is used in most cases.

It is crucial to provide clear 'anchor points' to participants. This means **instructing** participants to ensure that at least one statement is set at zero and at least one at ten. Without anchor points the results can be meaningless. When asking for relative importance, for example**, it is important to state that setting at zero does not necessarily mean that a statement has no importance**, rather that it is the least important.

The SuperUser sees the Rating results as they are submitted. Here one User has 'confrimed' their rating (the red blobs).

If the authorship of statements has been set in settings then hovering over a rating red blob will show the facilitator who made the rating.



At the top right of the SuperUser screen the facilitator is able to see whether a participant has started their rating, is in progress, or completed – 'Show User Progress'.

The final results of the rating (using 'display rating') will shows on the map under each of the statements rated: i) numerically by average score and degree of consensus (using standard deviation as a rough measure); ii) using a coloured bar where green indicates good agreement and red poor agreement; iii) an option to see the individual ratings (anonymously).

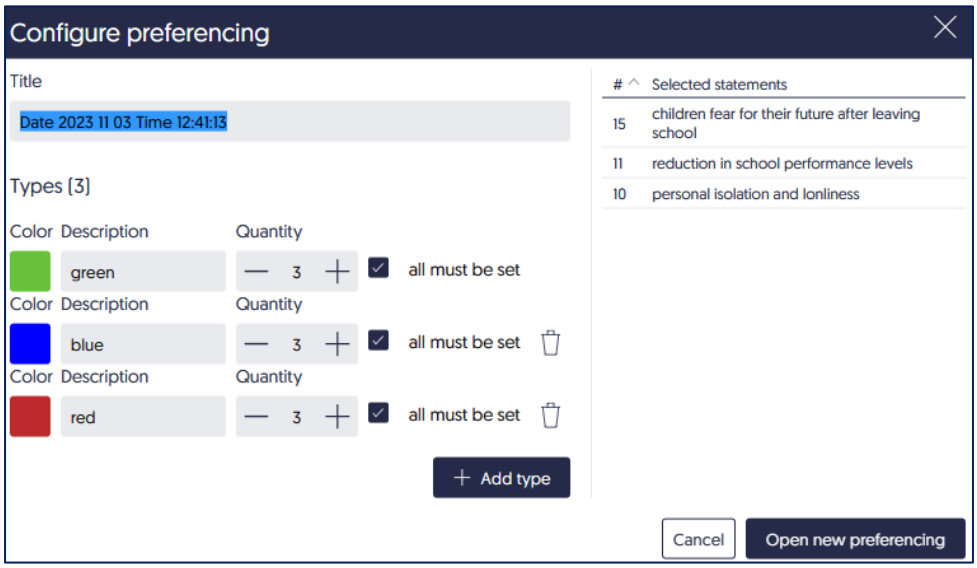
It is useful to advise participants to use ctrl- in their browser so that they can see more of the material to be rated; similarly the SuperUser might also use ctrl- to see more of what is being collected. Remember to remind all to use ctrl+ to move back to a more normal setting.

Setting up and using preferencing – the basics

Preferencing is a form of voting, but the terminology is deliberate in calling it preferencing as the process involves distributing resources between chosen statements. The process is akin to using sticky dots when making preferences on flip chart options.

The default settings are for the use of 3 different coloured 'blobs' (sticky-dots) and 3 blobs for each colour: green, blue and red. Typically green is used for practicality, blue for impact, and red as a veto. The label can be edited (for example, the word 'green' edited to say 'practical').

Note that more colours can be added, or subtracted. There is an option to enable 'all must be set', meaning that participants cannot confirm their preferences unless they have used all the 'blobs' For example, if using red as a veto then it is also appropriate to untick the 'all must be set' to allow for no use of the veto.



The SuperUser sees as below. Note that 'Show User Progress' (top right) enables the SuperUser to see User progress.

If the authorship of statements has been set in settings then hovering over a result 'blob' will show the facilitator who made the preference.

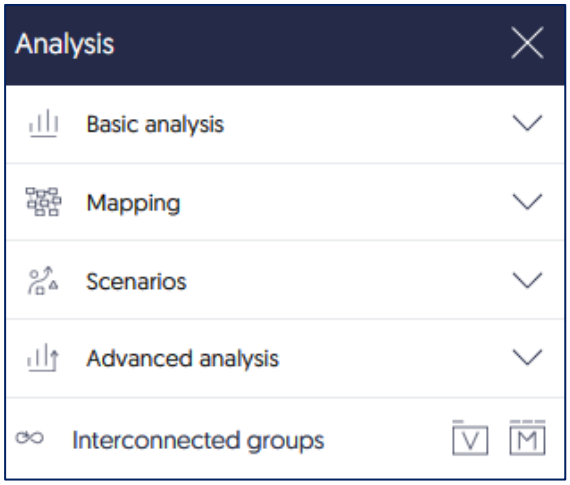
The results will show as Users submit their preferences. The results show the degree of consensus (how many Users have submitted blobs to the statement) as well as the number of blobs submitted. The results can be ordered (click on the colour blob, under the 'Show user progress).

Reminder: **Detailed instructions and advice on the use of the rating and preferencing** evaluations can be found in the '*Strategyfinder – Evaluation Using Rating and Preferencing*' manual.

Section 5: Analysis – the basics

The manual ***Strategyfinder* - Analysis Tools** provides details about the analysis tools.

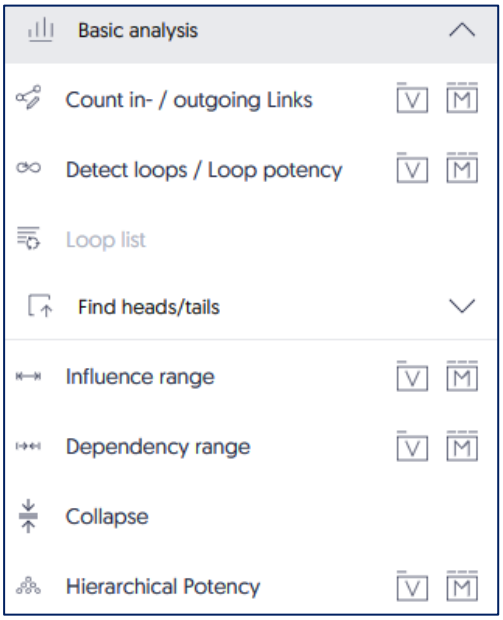
The analysis menu is separated into 4 parts (plus Interconnected groups):



For most analyses there is an option to undertake the analysis on the current view, or on the whole model .

The results can be changed to list by result, by statement number – for example, click on 'statement'.

Basic Analysis:



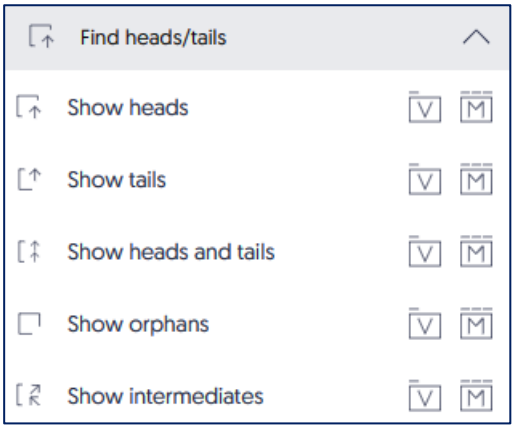
Most of the basic analyses are obvious. Below are notes providing a brief summary of those not necessarily so obvious:

Detect loops/ Loop potency: finds feedback loops and provides the most potent loop statements – those statements in the most loops. Note that from the Loops list it is possible to display the loop in a new view (the left icon with the +). 

The report shows a **summary**, the loops (each can be expanded) and also the relative potency of each loop (100 = highest potency= impacts the most other loops), and potency nodes (those statement that are in the most loops).

'*Loop list*' only shows loops once a loop analysis has been conducted. If the model is changed then the loop analysis will need be redone and so the loop list updates.

'*Find Heads/Tails*' menu extends:



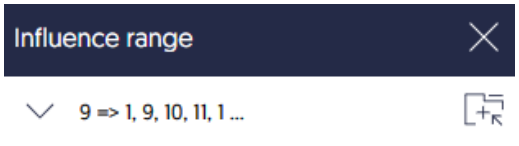
'Heads' are statement with no out-arrows. **'Tails'** are statement with no in-arrows.

'Orphans' are statements with no ins or outs.

'Intermediates' are those statement that are not heads, or tails, or orphans.

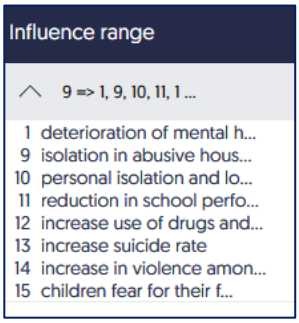
'*Influence range*': for a selected statement the analysis reveals all statements that are influenced by the selected statement.

In this example statement 9 was selected (clicked on to show a red dashed box around it) and the Influence range analysis requested. The results show:



By clicking the  icon the statements influenced by 9 can be shown on a new view as a map.

Clicking the down chevron will list the statements influenced by statement 9:



'*Dependency range*': for a selected statement the analysis reveals all statements which influence the selected statement – the 'drivers' of the selected statement and so options for action to change the status of the selected statement. The results display as for 'Influence range'.

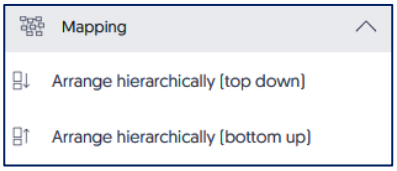
'*Collapse*' looks for paths between selected statements and shows a single arrow wherever there is a path from one selected statement to another. To undo 'collapse' simply click 'Reset view'  . The analysis is very useful for providing a **summary** of key selected statements in the map.

It is useful to use 'Select by category' from the Category menu when a collapse on categories is required, for example, collapsing on Goals, Strategies and Actions.

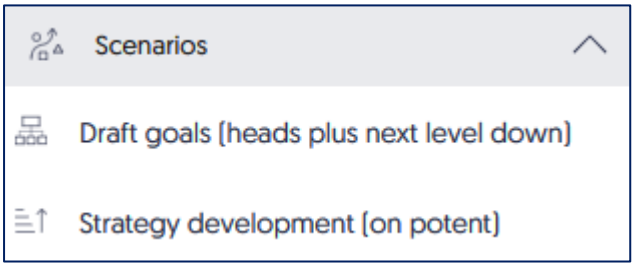
'*Hierarchical potency*': as with loop potency, this analysis calculates that statement which has both i) an impact on the most categorised goals, but also ii) the impact is highly robust – has several paths/routes to goals.

Mapping Analysis

Provides a way of focusing on either the consequences or explanations of selected statement that are on the view of the selected statement. These are automatically placed in a new view. This is similar to influence range and dependency range on view.



Scenarios Analysis



These 2 options each automatically produce new views.

'*Draft goals (heads plus next level down)*': helps identify the possible *goals system.*

Produces a new view with all of the heads (final outcomes for the current whole map – statements with no 'outs') and also shows those statement that impact/influence the heads.

The final outcomes are *currently* the most likely candidate goals. If they are not goals then the team should ask what these impact (laddering upwards) until goals or negative goals (disastrous outcomes that matter) are expressed and entered in the model.

If a head is defined as a goal then it is possible that the statement impacting/influencing that goal is also a goal. If a statement at the next level down does get categorised as goal then the team should explore the next level down (2nd level down) and also ask whether that is also a goal, and so on until the goals system is created.

'*Strategy development (on potent)*': focuses on the most hierarchically potent options and their consequences.

Automatically produces a series of views where the potent option is shown with its consequences.

Used for either i) quickly preparing a set of views that focus attention on the most potent options, and so can be used for validation purposes, or ii) quickly preparing views that focus attention on where strategy development is likely to be a priority.

'*Interconnected groups*'**:** does not need any selected statements. Finds all the statements connected independent of the link's directions. Finds 'islands' – a cluster of statements that are linked but not linked to other statements/clusters in the model.

Advanced Analysis

'*Detect strongly connected*'**:** statements that can reach each other within the component. A strongly connected component will, therefore, contain at least one loop. Very useful to find connected/nested loops.

'*Closeness centrality*'**:** measures the average distance to the other nodes in the network. A statement with high score has shortest distance to all other statements. This is a *centrality measure that is an alternative to counting ins/outs*. It used often when using mapping to undertake social network analysis.

'*Betweenness centrality*'**:** is a measure of how often a node is a bridge between other nodes. Nodes with high betweenness centrality are often important controllers of power or information. Score increases with the number of shortest paths from each statement to any other statement passing through the statement of interest. Those that are highly central *can change the problem definition significantly – so be sure it and its links are correct.*

'*Statement authors*': lists all statements and shows the authorship of a statement. The list can be filtered to show by author. This list will not be meaningful unless the settings menu has been set to 'Show Statement Author on hover'.

Presentation mode 

Presentation mode sends the screen of the SuperUser/Editor to all Users and they are unable to take any actions. This facility is used when the facilitator/leader wishes to ensure that Users do not change the model, but the facilitator does wish to make changes in view of all users.

Presentation mode is most often used when the facilitator wants to display on User screens the outcomes of rating and preferencing.

NOTE: this is not the same as 'shared screen' in Teams/Zoom: the Users do not see everything that the SuperUser is doing. If the menus and results of the menu are to be shared then it is best to use the 'share screen' facility in Zoom/Skype/Teams etc.

This icon toggles presentation mode on/off: showing red when ON (*it is very easy to forget that presentation mode is being used*!).

Lock model 

Locking a model means that anyone registered to the model can view a model but make no changes to it.

When a model is locked the padlock shows in red: 

AI assisted draft report generation (available on some versions only) 

This process generates a draft report based on Goals/Strategies/Actions. It explores all of the paths from each of these categorised statements and seeks to write a report (normal sentences and paragraphs) to explain the strategy.

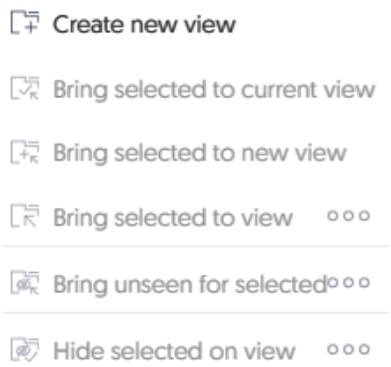
The process can tale several minutes, and the report is shown on the right-hand side of your screen.

A simple version that simply describes linked and numbered statements can be produced quickly and the copy/pasted to be edited.

Section 6: Managing ‘Views’ (tabs)

Creating a new view

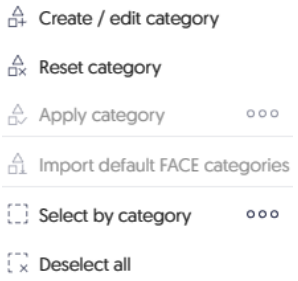
Use the ‘views’ icon:



Or alternatively use the ‘+’ icon under the back icon at top right: 

The other menu items are self explanatory. However selecting statement can be done in several ways. Selected statements show with a red dashed border around them:

i) select each statement in turn by clicking on the statement whilst holding down the shift or Ctrl key.

ii) select using the ‘Select by category’ option on the Categories menu 

iii) swipe across the statements to be selected. If too many have been selected in this way then hold the shift of Ctrl key down and click on those to deselect.

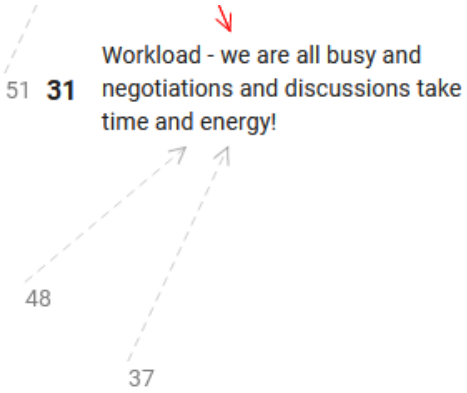
Seeing the ‘hidden’ context to a statement

Use the ‘mapping’ icon and ‘show unseen links’. However the settings menu allows a default setting to show unseen links: ‘none’, ‘All’, or ‘Only selected statements’.

Right click on a statement and use ‘Bring unseen for selected’ allows bring on to the view all ins, or outs, or both ins and outs.

Alternatively Search on the statement number showing on a hidden link and then click to the right of the listed statement.

For example:



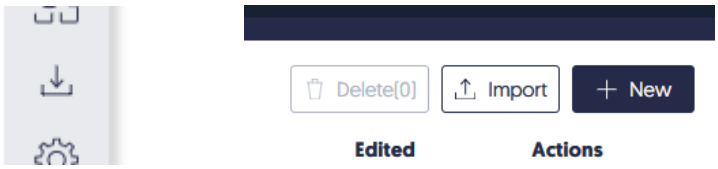
The dashed arrows show links to statements not on the view – thus statements 48 and 37 are linked to 31.

Section 7: Archiving, Slow synchronisation, Export/Import

Models can be **archived on a local computer** using the 'Export' function. Models can be exported as: i) a .json file and at any later time imported to a Strategyfinder server; or ii) a .txt file so that any model contents can then be easily copied pasted to WORD or EXCEL file at a later date.

Slow synchronisation of *Strategyfinder* locally with the server can most often be caused by any of the following: use of a VPN connection, use of a virus checker such as Bitdefender or Malwarebytes. If a virus checker is active then try temporarily turning this off.

Models can be exported to a local computer (go to model settings) so that they can be then imported to a different *Strategyfinder* server (top right in Model menu).



Section 8: Summary

The above provides a **basic introduction** to *Strategyfinder*. It is not designed to provide advice on the variety of uses of *Strategyfinder*.

There is a suite of other manuals about using Strategyfinder:

'USING STRATEGYFINDER' MANUALS

***Strategyfinder* - the basics [this manual]**

***Strategyfinder* - Analysis Tools**

Provides and overview of the different analysis tools available in *Strategyfinder*.

This manual indicates the use for each analysis as well as guidance in how to use a tool.

Method for Identifying an Optimal Group of *Strategyfinder* Participants

Choosing the participants for a *Strategyfinder* workshop is a crucial decision – who participates defines the topic to be addressed and so significantly influences the outcome of workshops. This is particularly important for Systemic Risk Management workshops.

This manual suggests a method that is often used for seeking an optimal group of participants.

***Strategyfinder* - familiarisation session to Users**

Sometimes it is helpful to introduce participants who have never been a part of a *Strategyfinder* workshop to its use, and also how best to optimise the use of a browser. Often this may be simply a 30min 'fun' workshop. This manual describes the design for a familiarisation workshop.

***Strategyfinder* – familiarisation session for SuperUsers with Users**

***Strategyfinder* – theories and concepts**

Provides the background to the development of Strategyfinder: thirty years of developing practice from good theory, and how *Strategyfinder* reflects this practice. Discusses previous software packages and their development.

***Strategyfinder* – the Development Background: History, Theories and Concepts**

Background Reading about the Development of the Methods

(copies of articles can be provided if requested)

Eden C, Ackermann F (2018) Theory into practice, practice to theory: Action Research in method development. European Journal of Operational Research 271:1145-1155.

Shaw D, Ackermann F, Eden C (2003) Approaches to Sharing Knowledge in Group Problem Structuring. Journal of the Operational Research Society 54:936-948

Bryson JM, Ackermann F, Eden C, Finn C (2004) Visible Thinking: Unlocking Causal Mapping for Practical Business Results. Wiley, Chichester.

Ackermann F, Eden C (2020) Group Support Systems: Concepts to Practice. In: Kilgour DM, Eden C (eds.) Handbook of Group Decision and Negotiation, Springer, Dordrecht, pp

Solution Finding (strategic Options Development and Analysis – SODA)

Eden C, Ackermann F (2010) Decision Making in Groups: theory and practice. In: Nutt P, Wilson D (eds.) Handbook of Decision Making, Blackwell, Oxford, pp 2301-272

Ackermann F, Eden C (2010) The Role of Group Support Systems: Negotiating Safe Energy. In: Kilgour DM, Eden C (eds.) Handbook of Group Decision and Negotiation, Springer, Dordrecht, pp285-299

Bryson JM, Ackermann F, Eden C (2016) Discovering Collaborative Advantage: The Contributions of Goal Categories and Visual Strategy Mapping. Public Administration Review 76:912-925

Strategy Development

Ackermann F, Eden C (2011) Making Strategy: Mapping Out Strategic Success. Sage, London.

Eden C, Ackermann F (1998) Making Strategy: The Journey of Strategic Management. Sage, London.

Eden C, Ackermann F (1992) Strategy Development and Implementation - the role of a Group Decision Support System. In: Kinney S, Bostrom RP, Watson R (eds.) Computer Augmented Teamwork: A Guided Tour, Van Nostrand and Reinhold, New York, pp325-342

Eden C, Ackermann F (2001) A Mapping Framework for Strategy Making. In: Huff A, Jenkins M (eds.) Mapping Strategy, Wiley, London, pp173-195

Bryson JM, Ackermann F, Eden C (2014) Visual Strategy. Wiley, San Francisco.

Exploiting Competitive Advantage

Bryson JM, Ackermann F, Eden C (2007) Putting the Resource-Based View of Strategy and Distinctive Competencies To Work in Public Organizations. Public Administration Review 67:702-717.

Eden C, Ackermann F (2000) Mapping distinctive competencies: a systemic approach. Journal of the Operational Research Society 51:12-20.

Ackermann F, Eden C (2011) Making Strategy: Mapping Out Strategic Success. Sage, London.

Stakeholder Management

Ackermann F, Eden C (2011) Making Strategy: Mapping Out Strategic Success. Sage, London.

Ackermann F, Eden C (2011) Strategic Management of Stakeholders: theory and practice. Long Range Planning 44:179-196

Eden C, Ackermann F (2021) Modelling Stakeholder Dynamics for Supporting Group Decision and Negotiation: Theory to Practice. Group Decision and Negotiation 30:1001-1025.

Conflict Management

Ackermann F, Eden C, Pyrko I (2016) Accelerated Multi-Organization Conflict Resolution. Group Decision and Negotiation 25:901-922.

Bryson JM, Ackermann F, Eden C (2016) Discovering Collaborative Advantage: The Contributions of Goal Categories and Visual Strategy Mapping. Public Administration Review 76:912-925.

Systemic Risk Management

Ackermann F, Eden C, Williams T, Howick S (2007) Systemic Risk Assessment: a case study. Journal of the Operational Research Society 58:39-51.

Williams TM, Ackermann F, Eden C (1997) Project Risk: systemicity, cause mapping and a scenario approach. In: Kahkonen K, Artto KA (eds.) Managing Risks in Projects, E&FN Spon, London, pp343-352

Gonzalez JJ, Eden C, Abildsnes E, Hauge M, Trentin M, Ragazzoni L, Berggren P, Jonson C-O, Abdelgawad AA (2021) Elicitation, analysis and mitigation of systemic pandemic risks. In: Adrot A, Grace R, Moore K, Zobel CW (eds.) 18th International Conference on Information Systems for Crisis Response and Management, ISCRAM, Blacksburg, Virginia, pp581-596

Gonzalez, J.J., Eden, C. (2022) Insights from the COVID-19 Pandemic for Systemic Risk Assessment and Management. In: Sasaki, J., Murayama, Y., Velev, D., Zlateva, P. (eds) In-formation Technology in Disaster Risk Reduction. ITDRR 2021. IFIP Advances in Information and Communication Technology, vol 638. Springer Nature. Cham, Switzer-land. https://doi.org/10.1007/978-3-031-04170-9_9

Eden C, Gonzalez JJ (2023). The Strategic Management of Disaster Risk Mitigation In: Radianti J, Gjøsæter T, Murayama Y (eds.) Information Technology in Disaster Risk Reduction ITDRR , Springer Nature, Cham, Switzerland.

Appendix: User Hints

Hint 1: Changing your password

Click the cog  at the top right of the main screen (to the left of your user name) and change password. Here you can also edit your profile name.

If you are in a model and need to get back the main screen then click on the icon top right: the back icon  .

Hint 2: Controlling your computer screen

Use **F11** on top row of your keyboard to go to **FULL SCREEN** (green button on a Mac) – this will provide strategyfinder with the space required. Clicking F11 again returns the screen to include browser tabs	
Check browser scaling – bring to 100% using Ctrl + or Ctrl – (Cmd on a Mac) – for example to zoom in…	
If something appears to go wrong then **refresh the browser**	

Hint 3: Controlling the *Strategyfinder* screen

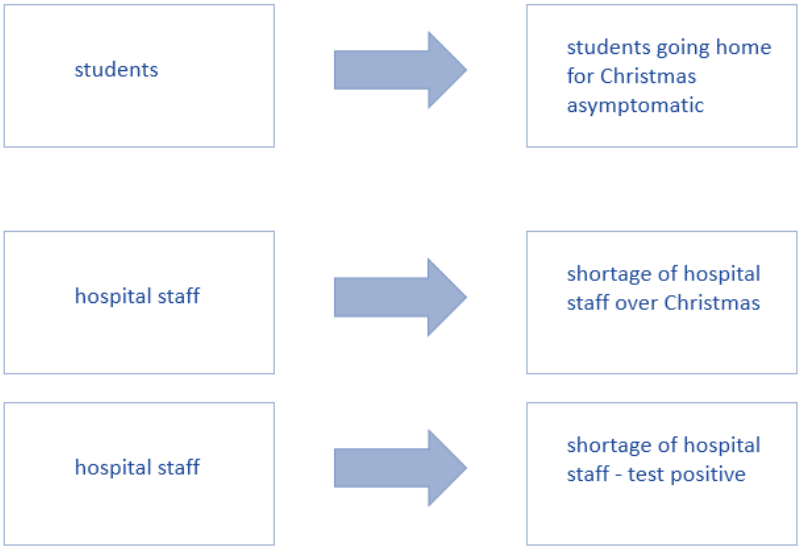
Fit to view – puts all the statements on the view in the view and centres it	
Reset view – when *Strategyfinder* focuses on a given set of statements (for example, after analysis shows just 'heads'/statements with no outs) the rest of the statements are greyed out. Reset view will show all statements with non greyed out	
Zoom in and out – use the mouse wheel to scroll in and out – the focus of the zoom will be where the mouse is positioned when using the scroll wheel	
Moving the map – right click with the mouse and move	

Hint 4: Tips on the phrasing/editing of statements

A well-constructed statement:

about 6-8 words, understandable to others, no more than one outcome in one statement.

But, the statement should have enough words to clearly express to others what is meant, for example:



Any statement entered by a participant can be edited. However, a participant will not be allowed to edit a statement entered by another participant. The facilitator is permitted to edit any statement.

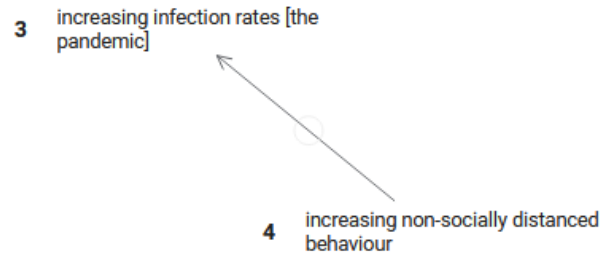
To edit a statement, double click the statement, and when editing is complete click 'enter'.

Hint 5: Causal linking

THE MEANING OF A CAUSAL LINK:

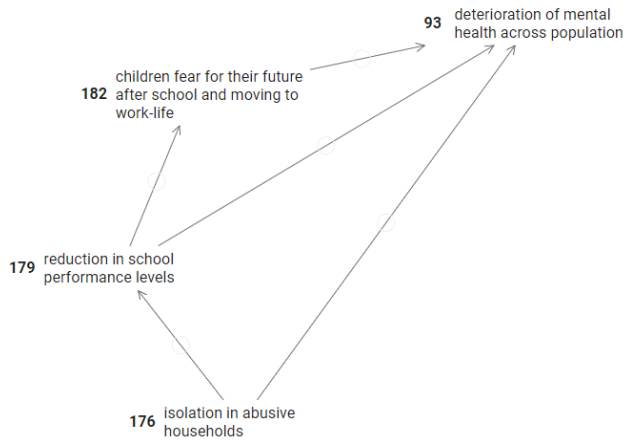
An arrow between two statements represents a causal link.

In the extract below the arrow from 4 to 3 represents the assertion that 'increasing non-socially distanced behaviour' causes 'increasing infection rates'.



TIP: Beware of unnecessary links that show a *summary of other links – leading to excessive linking* – two examples…

EXAMPLE 1:

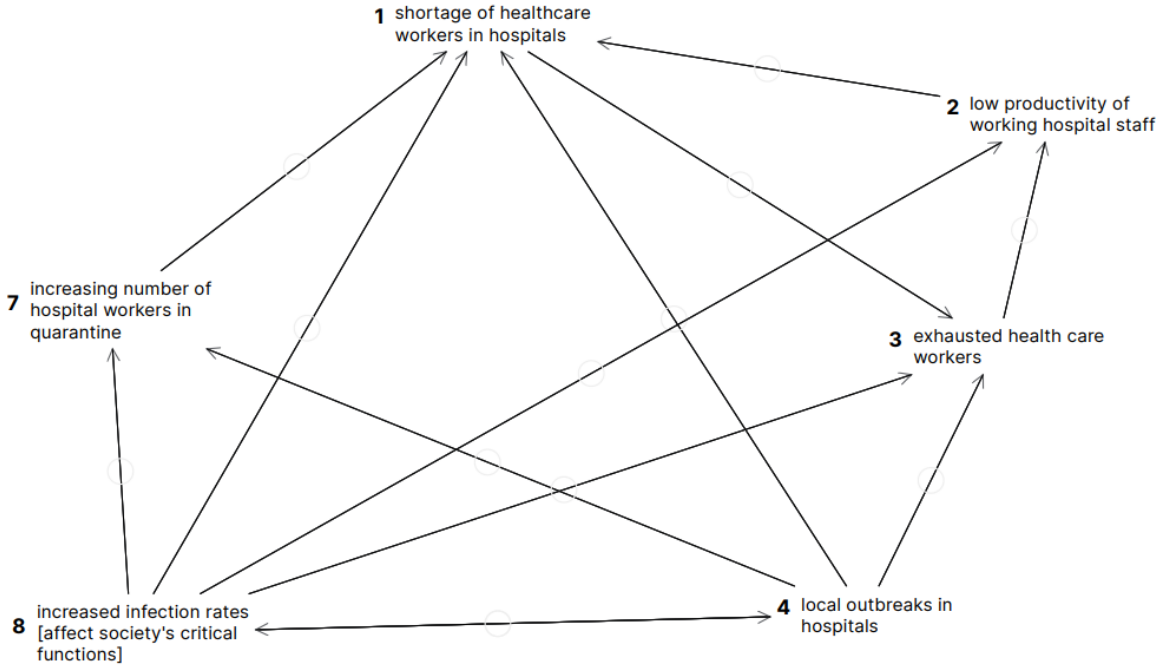


In the above causal map, there are two arrows (causal links) that might be summary links: 176>93 and 179>93. In both cases we need to ask whether these links represent a different assertion from 179>182>93 for the 179>93 link, and a different argument about what causes 93 directly from 176>93 rather than that expressed by 176>179>182>93. If the 'summary' links do not represent a different causality then these summary links should be deleted, or preferably not entered in the first place.

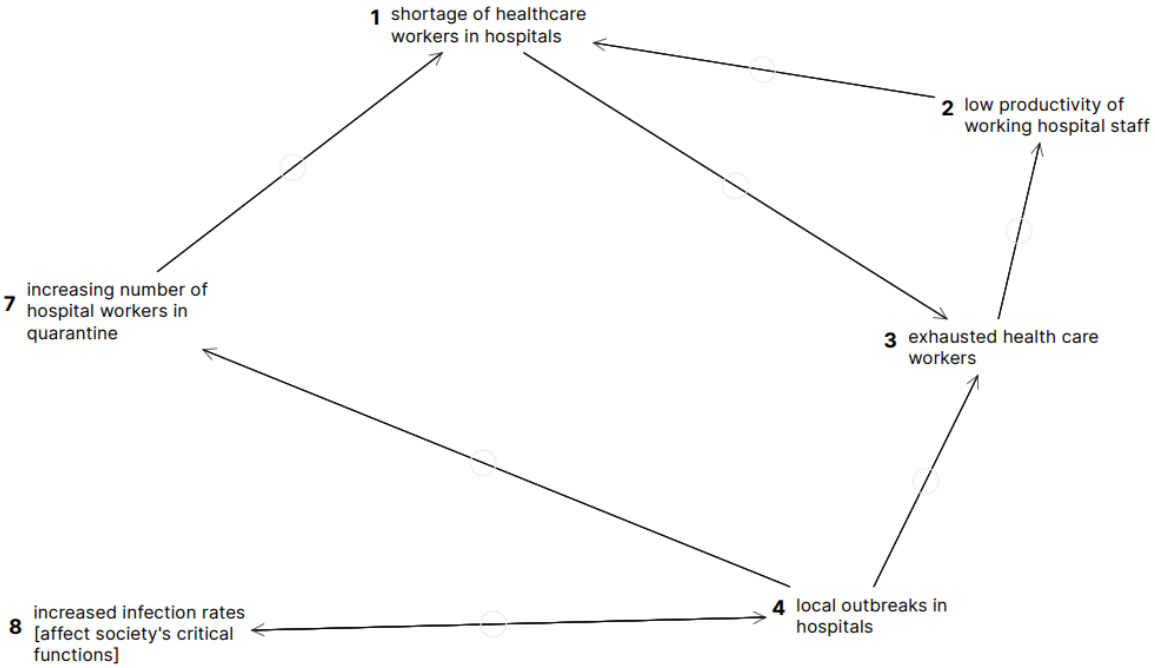
If the apparent **summary links** DO represent an alternative argument, an alternative way in which, for example, 176 can cause 93, then it will help if the participant is able to express the alternative causality by entering that argument, so that at least we have 176>new statement>93 as the second path of causality.

EXAMPLE 2:

Excessive linking…. 12 causal links versus 7 causal links.

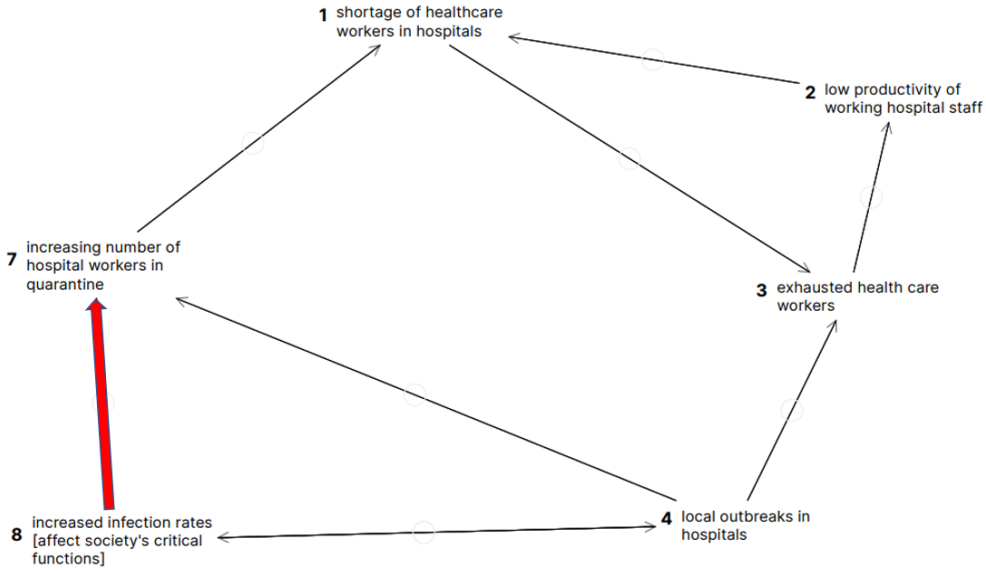


The final map as it likely should be – simpler to read and understand, and also lead to correct analysis of the network of links:

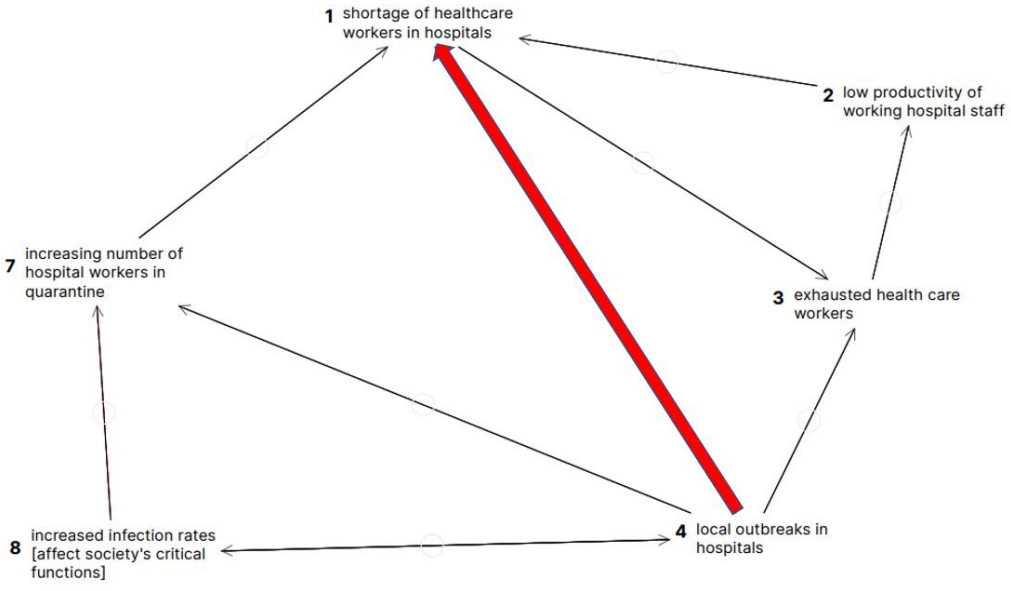


HOW IT HAPPENED:

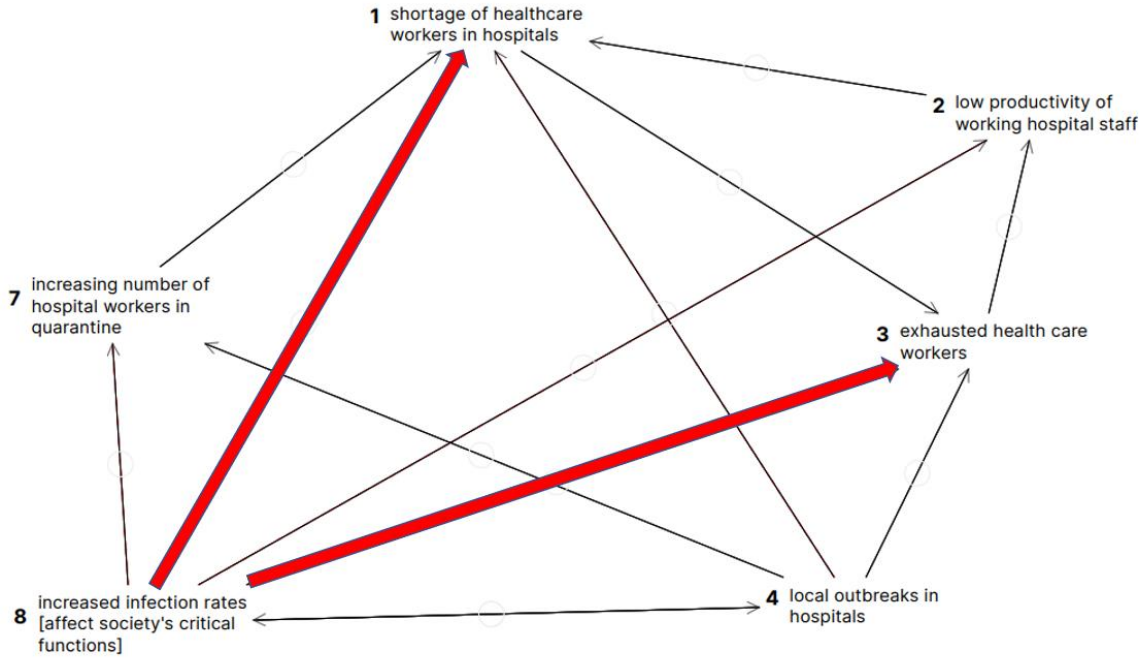
A participant adds the correct summary link 8>7. The causal link from infection rates to workers in quarantine is likely to summarise the links from 'infection rates' to 'local outbreaks *in hospital*' to '*hospital* workers in quarantine'.



Another participant adds a correct summary link from 4>1. It may be an additional valid link rather than just a summary link, but if so the explanation of the link must be added. At present it seems likely that this summarises the path of causality arguing that 'local outbreaks' cause 'exhausted workers' which causes 'low productivity' and so causes 'shortage of workers'. However, the summary link might be summarising 4>7>1 or 4>3>2>1.



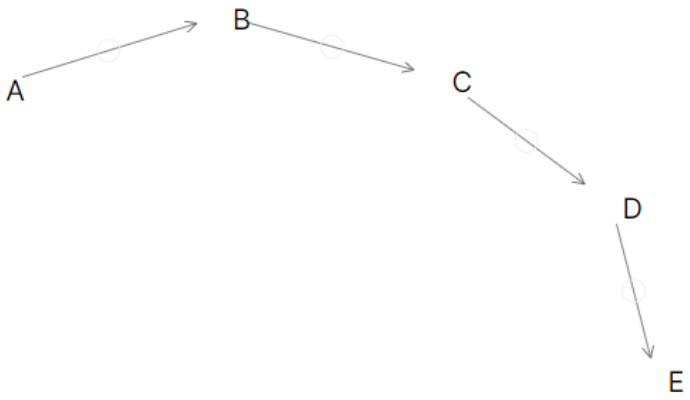
Finally, another two likely summary links are added, arguing that increased infection rates causes exhausted health care workers directly, whereas the indirect link through local outbreaks expresses the fuller causal argument. Similarly increased infection rates is seen as causally impacting shortage of health care workers, which is correct as a summary of 8>7>1, but implies another causal path. In both case if the second causal path is different from the more detailed path then the detail must be elaborated.



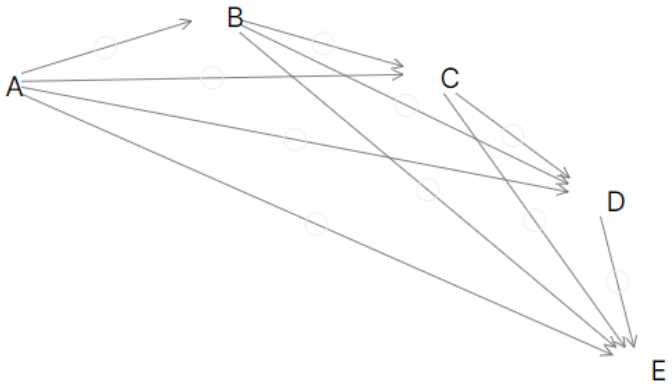
WHY DOES OVER-LINKING MATTER?

1. The map becomes very **messy and so difficult to follow.**
2. When detecting which are the most effective (potent) intervention points the calculation (using 'hierarchical potency' in the analysis menu) looks at the number of goals (or strategies, as specified for the analysis) a potential intervention point impacts BUT ALSO the degree of redundancy. The degree of redundancy considers the number of routes from the potential intervention point to the goals (strategies). Thus, a potential intervention point scores higher if there are more redundant paths of impact – this means that if one path fails then others might still fulfil the impact.
   If there is overlinking, by the introduction of summary links as in the above examples, then the calculation of potency will be incorrect by assuming redundancy in impact that is not there.

IN SUMMARY:
The following path of argument



Could potentially finish up, incorrectly, as a system of summary links in addition to a single causal path. 10 links versus 4 links.



WHAT TO DO TO AVOID OVERLINKING:

As linking progresses, when a likely summary link appears, pause the linking process and discuss the possible summary link – asking whether it is a summary link or another causal path. If a causal path then ask for the elaboration of the link. If there is an elaboration then add the additional statements and links. If it is a summary link then delete the summary link.

Explain why adding summary links matters: over complicates – difficult to read, and messes up analysis of the network to final potent intervention points.

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