STRATEGYFINDER

**TEAM SOLUTION FINDER – 2hr workshop
MANUAL**

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May 2023

Strategyfinder – Team Solution Finder

Contents

Introduction to this Manual

This manual focuses on using *Strategyfinder* for Team Solution Finding when faced with messy problems that require the input from a team.

There are a series of other manuals, some of which provide guidance in different facilitated workshops. (Those marked ** below are in development and those marked * have useable notes/drafts/chapters for reference - sometimes on PowerPoint format and can be obtained on request)

'USING STRATEGYFINDER' MANUALS
Strategyfinder – the Development Background: History, Theories and Concepts

Strategyfinder - the basics

Strategyfinder - Analysis Tools

A Method for Identifying *Strategyfinder* Participants

Strategyfinder - familiarisation session for participants (Users)

Strategyfinder - familiarisation session for participants - facilitated by SuperUser

Strategyfinder – an example of Team Solution Finding: option development and agreement

'STRATEGYFINDER WORKSHOP' MANUALS
Strategyfinder - Team Strategy Finding: a 1-2 day workshop – to develop a first draft of a strategy

Strategyfinder - Discover and Exploit Competitive Advantage

Strategyfinder – project managing strategy implementation

Strategyfinder – ideas for presenting the strategy/actions programme

Strategyfinder - Systemic Risk Management

Strategyfinder for Estimating using Delphi

Strategyfinder for brainstorming

Strategyfinder - SWOT to Action [available as a Powerpoint guide]

Strategyfinder - Stakeholder Analysis and Management

Strategyfinder – creating and agreeing purpose: a goals system

***Strategyfinder* for Conflict Management (SCM)

Team Solution Finding Objective

The process is used when a **team is facing a messy/complex problem where the experience and expertise of a whole team needs to be exploited** in order to find effective solutions.

Time is assumed to be tight, and the problem situation urgent.

A typical situation for Team Solution Finding using Strategyfinder might be, for example, when a team leader becomes aware of an urgent and messy problem face by his/her organisation/ division/ dept. The Team is located in a variety of places: for example, some in the team leader's office, some in their own office, some in other geographical location (perhaps overseas).

The team leader wishes to involve this wide range people in helping to: i) understand the nature of the problem (make sure they are not solving the 'wrong problem'), and ii) develop possible solutions that are effective – impactful and practical.

The facilitator/**team leader may be simply collecting ideas and not necessarily using the workshop to build an action plan** (although this can be done[1]).

Thus, there will likely be relatively short notice for participants, and some might be unable to join the workshop. Quick setup will be required – the facilitator/team leader might simply phone around team members available.

The workshop will be most often conducted with participants who have already used *Strategyfinder* before - they will be already registered Users with a login email and password for access to Strategyfinder.

It is likely be a quick process – 60-120mins.

Background - this manual assumes:

Participants are already familiar with using *Strategyfinder* as a result of previous workshops and/or with the 'basics' included in the manual: ***Strategyfinder* - the basics**, and through their own personal use. Thus, the Tasks are set out in summary form.

For greater detail of the Tasks refer to either the ***Strategyfinder* - Team Strategy Finding: a 1-2 day workshop – to develop a first draft of a strategy** or ***Strategyfinder* - Systemic Risk Management** manuals.

The schedule set out below assumes a 2hr workshop and must be regarded as very approximate and only indicative.

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[1] The manuals: '*Strategyfinder* – ideas for presenting a strategy/actions programme' and '*Strategyfinder* – help managing strategy implementation'

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Possible Workshop Schedule:

	APPROXIMATE TIMING			
Task No	**Start**	**Finish**	**Duration (mins)**	**Problem structuring – defining the nature of the problem**
1	0	2	2	Invite participants to add their name to the default view
2	2	4	2	Introduce the topic – shown on starter view
3	4	17	13	Gather an initial set of issues
4	17	23	6	Summarise clusters to facilitate 'listening' and encourage additions
5	23	30	7	Additions – missing issues.
6	30	40	10	Develop the 'means-ends' structure of the problem
7	40	50	10	Gain an impression of central issues prior to taking a quick break.

	APPROXIMATE TIMING			
	Start	**Finish**	**Duration (mins)**	**During the break (~20mins)**
1	0	5	5	SCENARIOS IN VIEWS: Draft goals (heads plus next level down)
2	5	10	5	Loop checks
3	10	15	5	SCENARIOS IN VIEWS: Strategy development (on potent)
4	15	20	5	Tidy views
WORKSHOP TIME PASSED			**70**	

	APPROXIMATE TIMING			
	Start	**Finish**	**Duration (mins)**	**After the break: Solution finding (~45mins)**
1	0	5	5	Presenting the draft problem goals system
2				*Developing solutions from potent options*
2a	5	15	10	Solutions by addressing potent loops
2b	15	25	10	Solutions by addressing hierarchically potent options
3	25	33	8	Consider practicality and impact of suggested actions
4	33	36	3	Reporting the results of the preferencing
5	36	38	2	Focus on best ideas
	38	45	7	*REPEAT cycle of some of Tasks 2-5 if time*
WORKSHOP TIME PASSED			**115**	
			5	**Summary**
WORKSHOP TIME PASSED			**120**	

Preparation (~4-5mins)

Task 1: Setup 'welcome' statement on default view

As with any workshop using *Strategyfinder*, it is very helpful to use the default view to welcome participants and be assured they are logged on and able to enter statements. However, its main purpose is to allow everyone to see who has connected to *Strategyfinder*. This task might be omitted if time is very short!

Thus, at the beginning, of the workshop setup the following:

- Statement 1 on the default view: "Welcome – please double click somewhere on the screen and type your name, hit 'enter'"
- Create a new view and rename it: for example, 'starter' or 'gather'

Task 2. Decide on a starter question

Such as "what are the issues we face in addressing the xxx problem we face?"

On a new view called 'starter', put the starter question in middle of screen.

Rename the model – use the 'gold Sf' icon and to .

Task 3: Provide access to the model for all participants.

Use one of two options:

i) If in the model then click the 'gold sf' icon. Got to the Users online icon . Go to 'ADD USERS', click on 'USER' to get list of possible users into alphabetical order. Add Users to model.

ii) If in the model list then under 'Actions' for the model click 'Edit Model Users' and choose Users by clicking on their name.

Task 4. Set model 'setting' if required

Decide whether submissions from participants are to be anonymous to the facilitator/team leader. This decision is partly an ethical issue and the facilitator/SuperUser will need to decide whether to inform participants. Go the 'gold sf' icon and select the 'Model settings' cog .

Task 5: Contact Participants and ask them log on to Strategyfinder and to the model named 'model name' (this is likely to be the only model showing on their screen, unless they have been given access to other models in the past).

Problem structuring – defining the nature of the problem (30-60mins)

Task 1: Invite participants to add their name to the default view (~2mins).

Purpose: Allow the facilitator/team leader to establish whether participants have logged on to *Strategyfinder* and the model. If available time is short, skip task 1.

Task 2. Introduce the topic – shown on starter view (~2mins).

"We will address a messy/complex problem that requires input from a variety of experience, expertise and roles."

Task 3. Gather an initial set of issues

Use 'blind gather' for getting issues from the participants. Look for around 40-50 ideas, so divide number of ideas by number of participants to set maximum number of statements in blind gather setup.

Remember, the team leader views are also very important, so add your own statements as the blind gather unfolds.

Remind Users to make their issue statements clear: approximately 6-8 words, action oriented (usually this means ensuring there is a verb – thus, for example: "size of group" might become "reduce size of group") unless statements of fact, etc[2].

Facilitator/team leader clusters similar or related ideas by moving statements around the screen as they appear. Each cluster is created as a relatively differentiated topic.

Stop blind gather when group is running down (usually after ~20mins), or screen is full (>40 ideas). Warn participants that gather will be stopped soon, but that there will be other opportunities to add more.

Task 4. Summarise clusters to facilitate 'listening' and encourage additions

Stop gather to summarise the cluster contents.

Note that the clusters will be very rough, and that it will not be worth arguing about whether they are correct – looking at clusters is a simple way of getting all participants to gain a view of all of the material via 'chunks' of material.

Ask participants to look at, for example, the 'top-right' of the view and briefly 'talk to it', noting the topic it covers. Participants can move their own statements if they are clear that they would expect their statement to be a part of another cluster/topic. However, because the process is aimed at facilitating 'listening' to the views of others, it is not important that clusters are 'accurate'.

Task 5. Additions – missing issues.

Ask participants for any new issues/opportunities that come to mind now they have seen an initial set of issues (not addressing an opportunity is, of course, an 'issue').

Additional material can be added using 'open gather' where all can see the new issues as they are entered. As for entering the name on the welcome view, ask participants to pick an open space, double-click, type statement, press enter. Remind them that they can then move their own statements around the view.

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[2] Appendix 1, Hint 4 is a useful guide.

Ask participants to locate their issue close to the cluster appropriate or start a new cluster.

Task 6. Develop the 'means-ends' structure of the problem

Ask participants to add causal links that show how if one issue (A) is resolved it may resolve another issue (B) – arrow from A to B. How one issue (A) may make another issue (B) worse or better. If the A makes B worse the encourage them to add a -ve sign by right clicking the arrow.

Facilitator note:

Adding a -ve sign (to indicate that a statement may cause the opposite of the statements at the end of the arrow) is not crucial at this stage – most participants will assume the nature of the causality.

The most common problem with adding links is that to get A>B>C and A>C where A>C is not a different causality but simply a summary link – watch for these and check the A>C link is a different causality[3].

Task 7. Gain an impression of central issues prior to taking a quick break.

Do a quick visual check, at this stage, of issues that seem to represent a bundle/cluster of connect issues – for example, high number of ins+outs.

If the participants are used to *Strategyfinder* analyses, then use ins/outs analysis and loop analysis (from the analysis menu[4]) for a quick overview of the problem structure.

Mark them by categorising them as 'Central' – right click 'Category', 'Apply Category', 'Central' (red).

Make sure there are not repeats of topic or 'red' statements that are causally related through a one or two links and are about the same topic – if so reset one to default category.

If there is enough time, then a good way of closing before a break is to ask the group to rate the relative significance of these 'central' statements for "solving the problem being addressed – quick and rough judgments".

Select all the 'Central' (red) statements – use the 'Categories' menu and 'Select By Category'.

'Setup Rating' from the 'Evaluations' menu, using the default 0-10 scale. Ask participants to rate relative importance by moving **at least one rating to 10**, and **at least one to 0** (representing common 'anchor' points and place the rest on the scale on a relative weighting. Indicate that a rating of zero does NOT suggest that it is unimportant, rather that it is the least important.

"This is a quick and rough exercise, so be quick". Remind them to submit.

Close rating and go to 'Display Rating. Use 'Presentation' mode so all can see the results on their own computer screen ('Presentation mode' icon will turn red to remind you that you are in presentation mode).

State that the top-rated topics will be the basis for focus after the break, and after a more careful analysis.

Turn 'Presentation mode' off, and 'Hide Rating'.

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[3] Appendix 1 contains some notes that might be usefully printed out for new users of Strategyfinder – note particularly Hint 5.
[4] See 'Strategyfinder – Analysis Tools' manual.

During the break (~10-20mins)

Use the scenario analysis tools to provide initial drafts of views that might be the focus after the break.

Unsure you use the 'Sf' settings to **set 'Show unseen links' to 'All'**. This will mean that you and participants from now on see all statements in their immediate context of other statements (that may then be brought on to the view or searched for by statement number to see their content.

From the 'Analysis' menu, you will use the 'Detect Loops' and 'Scenarios' menu:

Task 1: SCENARIOS: Draft goals (heads plus next level down):

Go to 'Scenarios' in 'Analysis' menu. The 'Draft goals (heads plus next level down' automatically finds all head (issues with no out-arrows) and then finds issues that impact those heads from one-level down only. The heads represent the statements that represent ultimate outcomes and so possible goals. Given you will have set the problem question then you may quickly categorise any that are obvious goals expected from the resolution of the problem. Goals are good outcomes in their own right – they are not optional.

If there are no goals among the heads, then quickly 'ladder' upwards to the goals you would expect – although pay attention to the nature of the outcomes defined by the team. Some of the 'heads' may be expressions of 'negative goals'[5].

If some of the 'heads' are obvious goals/negative goals, then consider the issue that is the next level down – this may also be a goal

Task 2: Loop checks.

Feedback loops are critical for solution finding and after considering agreeing the 'gaols system' then focus: on vicious cycles (getting rid of them or making them virtuous), virtuous cycles (reinforcing them), and balancing loops (check whether they are balancing out virtuous cycles or making actions ineffective).

Prepare views of the most potent loops: use 'Analysis', 'Detect Loops', put them in order of potency and request a view be automatically produced: use the down chevron :
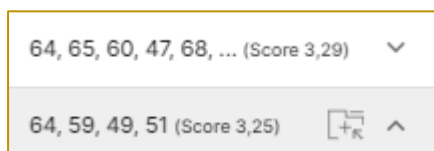
Categorise the most potent loop statements as 'options'.

Task 3: SCENARIOS: Strategy development (on potent):

Automatically finds the most potent options and creates a set of views where the consequences of acting on the hierarchically potent option are shown in a series of draft views. A potent option will

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[5] See Conceptual background' for an understanding of the significance of 'negative goals' and the need or eliciting a goals 'system'

be potent with respect to chosen (selected) statements (typically the goals). Potency implies that a statement impacts the most goals and with many paths of impact to the goals[6].

The instructions for using the analysis permit a choice of the number of layers of consequences shown on the view. In addition, you can choose the number of statements to appear on the view: the default is a maximum of 10 statements, but for team solution finding (where participants may be 'experienced' readers of a map) it is usual and helpful to set this at 20 statements, giving a reasonably complex map. [NOTE: these are approximate instructions for the creation of the view and more statements may need to be added or hidden]

The analysis depends on pointing the analysis to the nature of potency required: usually the analysis is done with respect to goals, but strategies might also be chosen. Thus, before requesting the analysis a set of statements must be selected. If the analysis is to be on goals then got to the 'Categories' menu and 'Select by Category' and choose 'Goals' – all of the statements categorised as a goal will now show as selected (red dashed box around the statement). Of course, you can slects any set of statements for the analysis, and so strategy development views (click on a statement, hold the shift or ctrl key down and click on another statement, etc).

Categorise the most potent statements that show on each automatically created view as 'options'.

The first view automatically created shows the outcomes of the most potent statement, the next view shows the outcomes of the next most potent statement, etc.

Task 4: TIDY views.
Usually, the maps produced automatically will need some tidying so that they display the hierarchy (arrows leading up the view towards outcomes at the top).

Tidying may also include editing issues to make them more action oriented, and to take out 'should', 'ought', 'need' etc (although experienced Users are less likely to use such phraseology)[7].

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[6] See Strategyfinder – Analysis Tools' manual for a description of the hierarchical potency method.
[7] See Appendix 1 Hint 4.

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After the break: Solution finding

Task 1: Presenting the draft problem goals system

During the break you will have created a draft goals view with the 'heads' and one level down from them. This is the basis for an agreed goals system with respect to the problem. This will have been the basis for your drafting of the goals system being proposed.

Everyone is directed to the 'goals system' view.

Remind all that it is a **quick draft** and it can be modified continuously as the strategy development and action programmes are agreed. Usually this means refining the wording.

The goals system is a significant aspect of analysis for agreeing action – it was likely the basis for finding potent risks for mitigation. Potency analysis found those options (potential strategies/actions), that if addressed, will have an impact on the maximum number of goals and in a way that is robust (that is there are many paths to impacting goals).

As this draft has been produced by the manager/team leader then it is likely taht little discussion is required, unless there are significant suggestions for editing links or goal statements. The main purpose of the task is simply reporting on the goals system and using it as a powerful context for the rest of the workshop.

The view may be referred back to several times during the rest of the workshop, with the wording of the goals tightened continuously.

Task 2: Developing solutions from potent options

Solutions to the dangers of vicious cycles is the top priority as these suggest the situation will get continuously worse over time (Task 2a below). The analysis identified the potent loops and Task 2 of preparation setup a view showing the most potent loop(s) and potent options within the loop structure.

Similarly, Task 3 of preparation setup views relating to hierarchically potent options.

This task (2a and 2b) will focus on strategy development to deal with the most potent options by working on the top potent loop(s) view first, then the top hierarchically potent view, and then the second most potent loop view, etc.

Judgment will need to be made as to the balance of time between number of views to be addressed and the time spent on each view. For example, sometimes it is more important to address a portfolio of views in a quick and rough way, and on other occasions best to focus all attention on one or two highly crucial (exceptional high relative potency) views.

Developing Options to manage potent options

It is very important to remind the group that this is an exercise focusing solely on the potential strategy (the potent categorised option) and its consequences.

Also remind the group that they might recall statements elsewhere in the model that are relevant possible options – and these can be searched for using 'search' or flipping back to a previous view, and then brought to the strategy view under consideration. A participant can bring and existing statement on the view being considered simply by their using the search facility, with only a tiny bit of remembered text, and then using to bring the statement (however, they will not be able to

position it on the view unless they originally created the statement, the team leader/facilitator (SuperUser) will have to move it).

Use 'open gather' rather than 'blind gather' because in this instance ideas flow from expanding the ideas of others. With open gather everyone sees what is being added to the view.

Ask the group to add new options designed to deliver the potent option and/or its consequences categorised as such.

As they add new options, then ensure that they also add the link to which statement of the view they impact, the option is intended to address, and so build the structure of means-ends.

The aim is to have enough agreed practical and impactful actions that will address the potent option. The potent option may then be re-categorised as an agreed 'strategy' along with a portfolio/programme of actions to deliver the strategy. See evaluating options below (Task 3).

Task 2a: Solutions by addressing potent loops[8].

Strategy development – top potent vicious cycle(s) risk.
When seeking options to mitigate a vicious cycle there are a number of ways to do this, and each might be considered.

Principles of strategy/action development when working with complex vicious/virtuous cycles:

- **Find the dominant vicious cycle** AND **attack it with a portfolio of strategies. A portfolio of strategies is needed because** some will fail – some of these will be triggers to the loop.
- Find the **causal link that if deleted** reduces the maximum number of loops AND find a strategy to get rid of that causality.
- **Get rid of the dominant vicious cycle** by attacking one of the causal links.
- **Attack the statement that is at the core of the vicious cycle** – the most potent risk (pre-marked with categorising or by asterisks – see Task 3 in Preparation).
- Flip the vicious cycle and make it work as **a virtuous cycle** (this is usually difficult and requires 'hard-hitting portfolio attacking many risks on the loop)
- **Make the cycle a balancing loop** – strategies to turn a causal link to the opposite impact
- **Facilitator notes:** Solving one vicious cycle is never enough, and often will not happen quickly enough without attacking the other dominant linked vicious cycles

Task 2b: Solutions by addressing hierarchically potent options

The process is similar to working on loops.

Use 'open gather' to collect ideas for actions that will deliver the potent option and its consequences.

Task 3: Consider practicality and impact of suggested actions[9]
This process applies when working with loop potency and hierarchical potency views.

Preferencing will be used after option development for a particular view, and so before developing options for the next view – to gain closure on one view before moving on.

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[8] Appendix 2 provides an example of managing a vicious cycle by developing options.
[9] This process is described in greater detail in the *Strategyfinder* **– Systemic Risk Management** manual.

Introduce the purpose and use of preferencing: anonymous evaluation on the 2 dimensions of practicality and impact (with the possibility of 'veto').

The group will make a judgment between promising options using preferencing.

Select the options to be evaluated:

When there is a 'root' of options – branches down to more detailed options, and no consequential branches, then there is no need to evaluate the detailed option branches. In this case, if the highest-level option is not judged to be a priority action, then the details will not need to be considered. However, if the highest-level option is regarded as a priority, then the details (next level down) can be evaluated. This 'rule' is guidance only and judgment will also be used.

Evaluations of options typically require participants to judge both **impact** on the outcome/potent option (potential strategy) and **practicality**. And so, ideally, identify and agree options that are both impactful AND practical.

In addition, no situation can be resolved with an expectation of the availability of an infinite amount of resource. In this judgmental exercise, therefore, not only are there the 2 dimensions of impact and practicality to consider, but also a restricted amount of resources to distribute and so force a choice.

Preferencing allows 'resources' in the form of coloured blobs (like self-adhesive sticky blobs used when evaluated statements on a 'flip-chart'). Thus, the process of setting up preferencing is as follows:

Change **title** if necessary – although note the default will record date and time. In our refugee example we might give it a title of "refugee accommodation". A descriptive title is very useful when displaying the results or returning to review a previous stored evaluation.

The default provides 3 of each of 'green', 'blue' and 'red' resources. We need only two **resources – for practicality and impact**, so remove red. The colours can be changed.

The default descriptors for the colours green and blue can be changed to practicality and impact as below.

Set the **number of resources** for each type of resource: for practicality and impact it is usual to use the same number of resources. Also use an odd number of resources to make forced choice more likely (and if there 2 persons acting as if one person then they can split the resources in two but are usefully forced to agree on one resource).

In the hierarchy example there are 9 options to evaluate and the evaluation works better with less resources than options so that some options must come out on top. Thus, in our example we will allow the allocation of 7 blue and 7 green.

Sometimes using the red blobs can be very helpful when wanting the team to make a personal plea that an option is not considered sensible: **veto**. In this case provide 3 reds that do NOT need to be used (thus turn off 'all points must be set') – the use of RED as a veto may be useful when **political feasibility** needs to be evaluated.

Configure your new preferencing

Title (short description)
delivery

Types

Color		Quantity		
🟩	practical	− 7 +	☑ all must be set	
🟦	impact	− 7 +	☑ all must be set	✕
🟥	veto	− 3 +	☐ all must be set	✕

Number of types 3   **ADD TYPE**

Selected statements

#	STATEMENT
24	threat must be real for them and me
34	provide Jnlst with promising story

CANCEL   **START PREFERENCING**

In the above settings: the names for each colour have been edited (for example from 'green' to 'practical'), the quantity for each colour has been changed from the default of 3 to 7 in the case of practical and impact, the veto switch has been unticked as there is no requirement to veto!

Briefing to participants about preferencing:

"You now have a chance to use your own experience and judgment to evaluate these selected options against 2 criteria: impact on our desired outcome (BLUE blobs) – not enough room for hosting refugees -and the practicality (GREEN blobs) of the option in achieving that outcome. [There is also another judgment you can make: if you think that the option is non-viable/stupid and you might seek to sabotage it, then use the red resources you will be given – you do NOT have to use these, and your use of them will obviously remain anonymous]. You have been provided with a restricted number of resources to reflect the fact that we are always short of energy/time/money etc and to therefore force you to make a choice. Blobs can be moved between statements, as well as from the 'store' on the left to drop over a statement."

Facilitator note:

When the preferencing appears on a user screen the left inset showing the blobs will often cover a part of the map – thus suggest to participants that they move the map to the right (right-click and move) and zoom out/in (use scroll wheel) so that all the whole of the map can be seen.

Progress can be tracked using the 'SHOW USER LIST' at top left. This will show the list of those logged on to the model and will show green on the 3 icons: ⟳ = logged on, ▷ = started preferencing, and ✓ = completed and confirmed.

Remind participants of the need to submit in order for their views to be registered.

After most have submitted it will be important to give a deadline for final submission, so that others don't become tetchy!

As the results appear hover over the entries to build a view about the degree of consensus – whether a high number of blobs have come from few people.

Task 4: Reporting the results of the preferencing

As for using the rating evaluation, the results can be displayed and shared using either share screen or via presentation mode.

Comment on the degree of consensus, and on any that are showing veto (red blobs – if this was permitted).

Where there are a high number of both resources and good consensus then propose this be an agreed action and categorised as an 'action'

If there is time: When there are high resources for impact but little practicality, then promote a brief discussion about whether there are obvious ways to convert the option into something more practical. And vice-versa, when there is an option that is highly practical, then promote a brief discussion about whether the option can be made more impactful. Sometimes the discussion may reveal a misunderstanding about the nature of the option, and it can be reworded accordingly. Sometimes the discussion leads to the need for research. When any of these cases occur, the option may be categorised as an option (green no-italics) and a note added.

Facilitator note:

If using 'share screen' in Zoom/Team/etc then beware that if you have authorship turned on in model settings then everyone will see the author if you accidently hover over a statement.

Task 5. Focus on best actions

Change the style of each top preferenced idea to 'action' (*green italics*), and the original potent option to 'strategy'.

Summary

Bring all goals, strategies and actions to one view (use 'Categories;, Select by Category', 'Views', 'Bring selected to new view').

Use 'Collapse' to see an overview of agreements ('Mapping', 'Collapse').

The collapsed map shows a summary of agreement and the paths that connect them.

Appendix 1: 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 gold sf icon top left and then click on 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	[F11]
Check browser scaling – bring to 100% using Ctrl + or Ctrl – (Cmd on a Mac) – for example to zoom in...	ctrl with
If something appears to go wrong then **refresh the browser**	C

Hint 3: Controlling the *Strategyfinder* screen
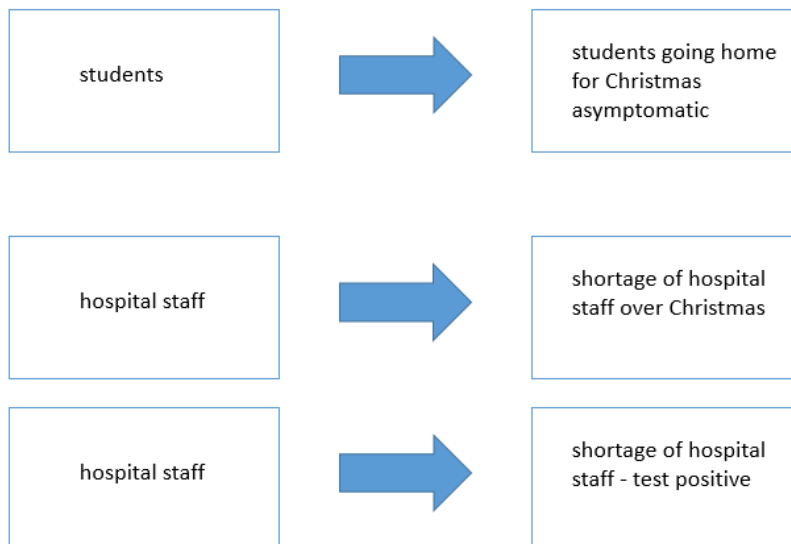
Fit to view – puts all the statements on the view in the view and centres it	⤢
Reset view – when *Strategyfinder* focuses on a given set of statements (for example, after analysis shows just 'heads'/statements with no outs) the rest of the statements are greyed out. Reset view will show all statements 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 what is meant, for example:

| students	→	students going home for Christmas asymptomatic
hospital staff	→	shortage of hospital staff over Christmas
hospital staff	→	shortage of hospital staff - test positive

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'.
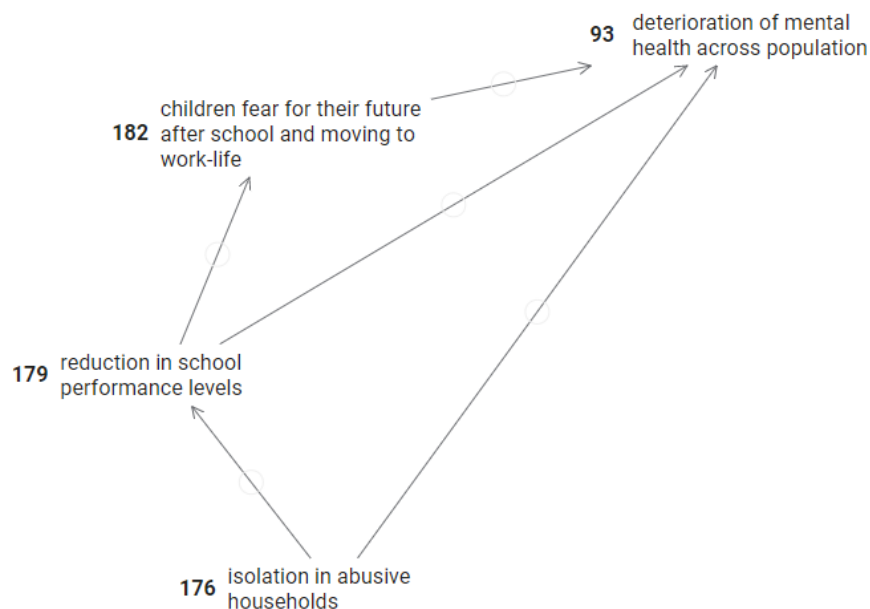
Hint 5: Causal links - TIPS

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'.
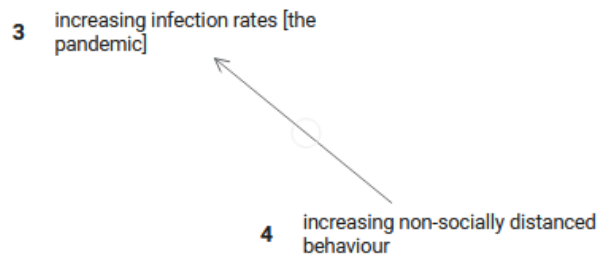
Beware of unnecessary links that show a *summary of other links*:

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.

# Appendix 2: An Example of Finding Solutions to a Vicious Cycle

The EXAMPLE below is from work with the Transport Security Administration top team (TSA) in the USA. It has been adapted to retain confidentiality.

The Transport Security Administration (TSA) top team and their vicious cycle

Consultants: Colin Eden & Fran Ackermann
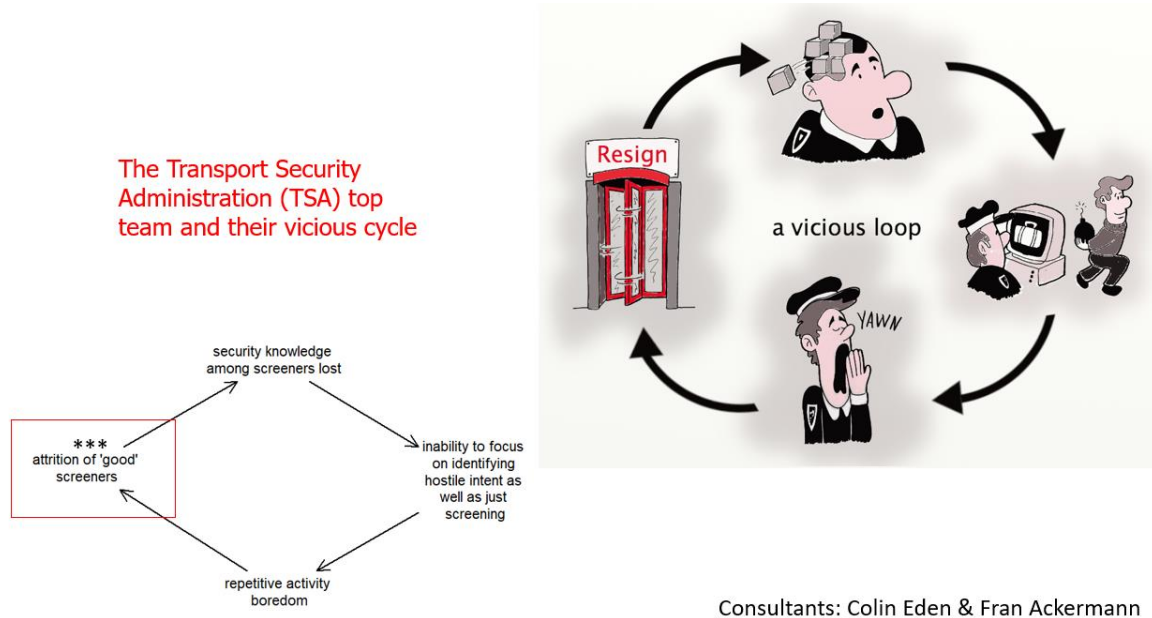
Addressing a vicious cycle: At the core of their 'open gather', that was about a 'blue sky' strategy development, was the operational issue of 'attrition of screeners'. This was a part of a several vicious cycle that all included this statement (the above is an example of one of these vicious cycles. (Cartoon extracted from Bryson, John M.; Ackermann, Fran, and Eden, Colin. *Visual Strategy*. San Francisco: Wiley; 2014.)
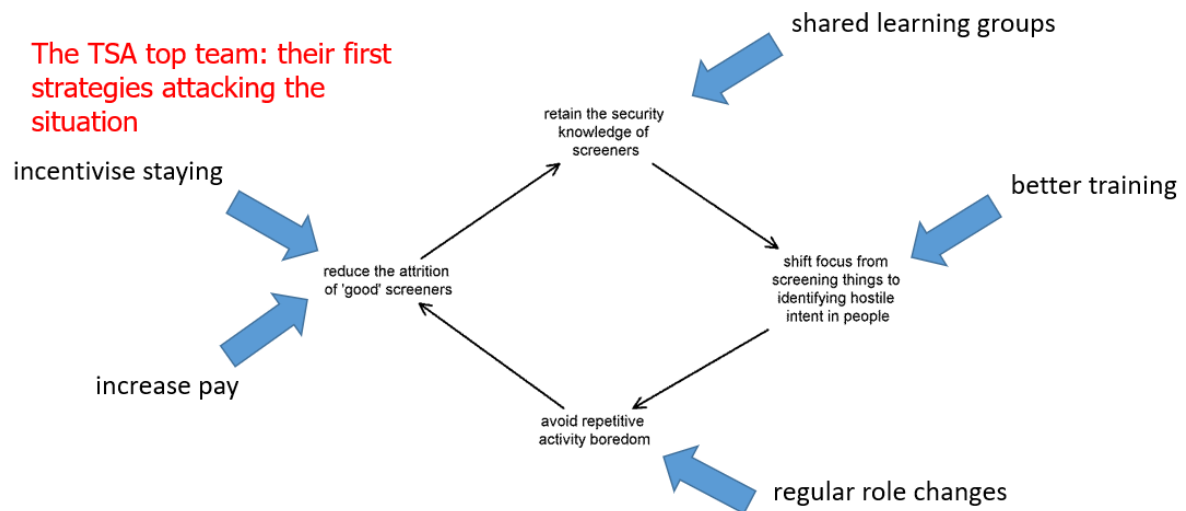

The TSA top team: their first strategy development focus

Consultants: Colin Eden & Fran Ackermann
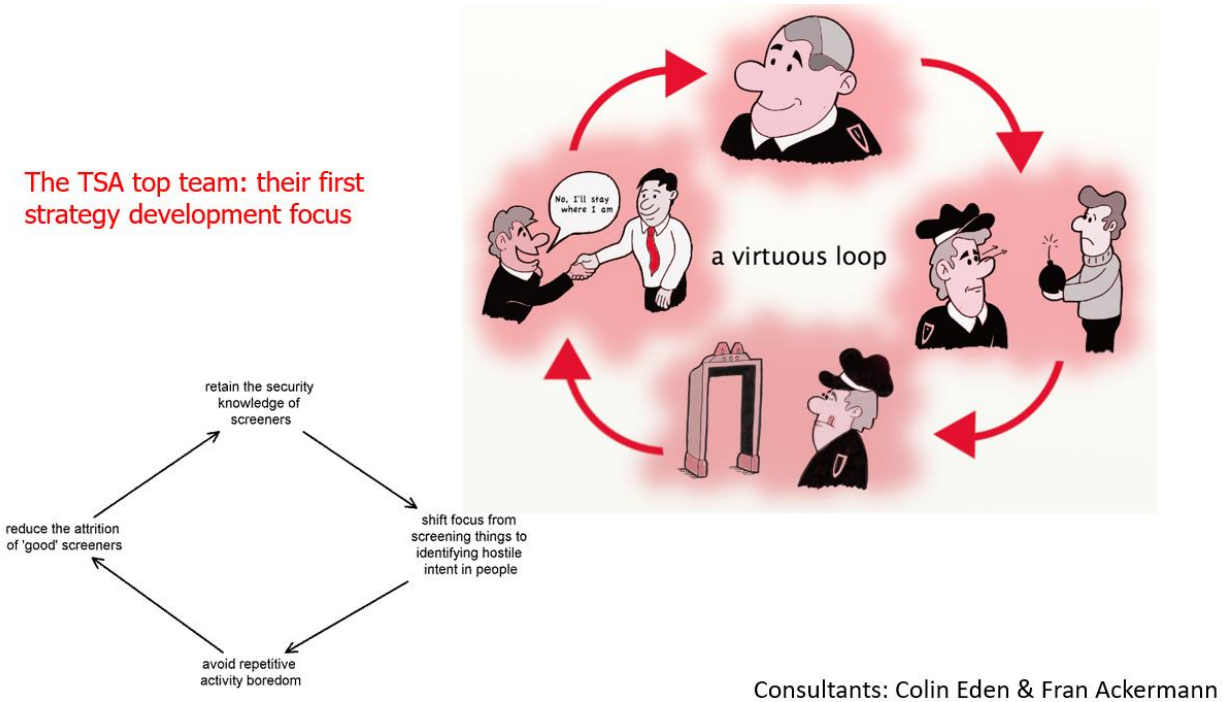
Addressing a vicious cycle: The first strategy development attempt: Make a vicious cycle a VIRTUOUS cycle (as above)
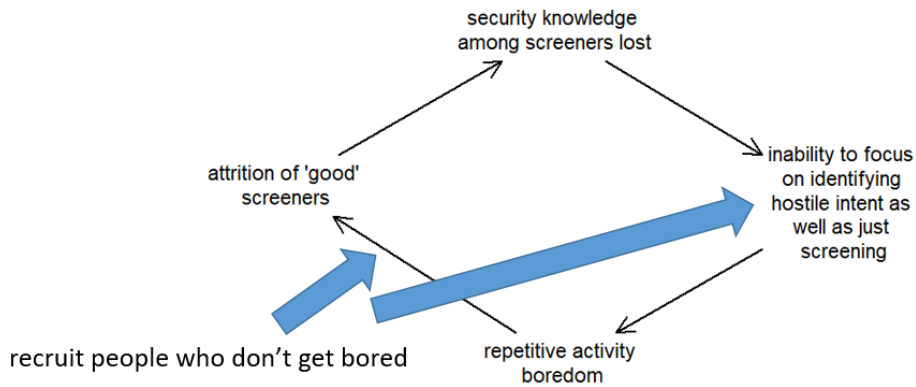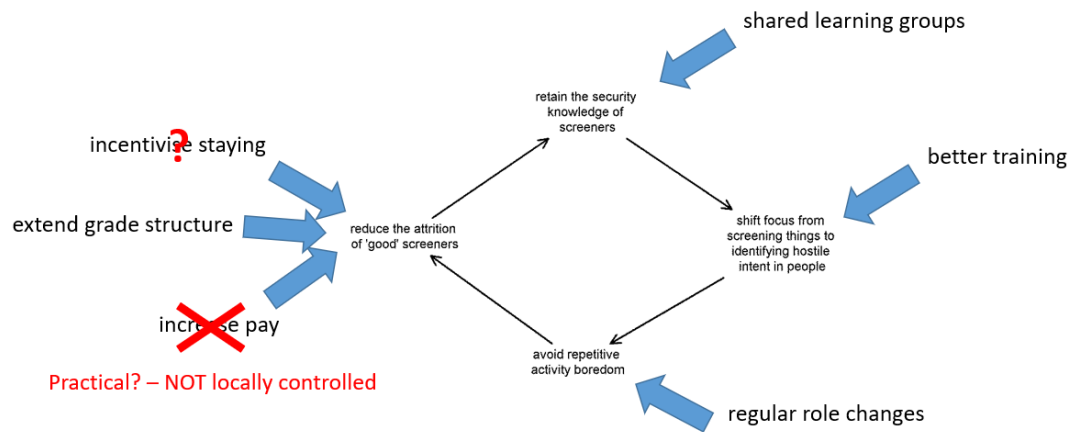

FIRST PROPOSAL: Getting rid of a causal link

Consultants: Colin Eden & Fran Ackermann

Addressing a vicious cycle: Looking for potential actions to make the loop virtuous: delete an arrow and/or act on a statement

The TSA top team: their first strategies attacking the situation

incentivise staying

increase pay

shared learning groups

better training

regular role changes

Addressing a vicious cycle: Look for portfolio of options/actions

shared learning groups

retain the security
knowledge of
screeners

better training

incentivise staying **?**

reduce the attrition
of 'good' screeners

shift focus from
screening things to
identifying hostile
intent in people

extend grade structure

increase pay

avoid repetitive
activity boredom

regular role changes

Practical? – NOT locally controlled

PORTFOLIO of strategies – each high leverage <u>AND</u> practical