

Note

The *development divisions* of Systems PlanningSM (Perdicoulis, 2014b) contain essential references and guidelines associated with innovation (Research LabSM), praxis (Planning StudioSM), and education (Systems SchoolSM), whose implementation requires corresponding *support* to the human effort — i.e. regarding outreach (§ 1.1), application (§ 1.2), and training (§ 1.3).

1 Development Divisions

1.1 Research LabSM — Outreach Support

Academic ActivismSM Community awareness through guidance in a *reflective* mode — e.g. through careful observation of situation dynamics, informed discussions, group mental modelling, and the collaborative conception of creative solutions (Perdicoulis, 2014I)

Outreach SeminarsSM Explanatory and/ or motivational talks that present interesting aspects of Systems PlanningSM along the themes of its missions to a broad range of stakeholders worldwide (Perdicoulis, 2014I)

1.2 Planning StudioSM — Application Support

Boutique ConsultingSM Praxis project guidance in a *facilitative* mode; empowers people through discovery and understanding (Perdicoulis, 2014b)

Cognitive CoachingSM Praxis project guidance in a *counselling* mode; empowers people through culture- and/ or perspective-oriented guidance (Perdicoulis, 2014b)

1.3 Systems SchoolSM — Training Support

Specialist WorkshopsSM Short and focussed training sessions with immediate practical outcomes as well as cumulative contributions to Haute CultureTM: (a) entry-level *X-ray PackTM* series; (b) advanced-level *MasterclassTM* series; (c) artefact *Pro UtilityTM* series (Perdicoulis, 2014c)

Scholarly ClubsSM The Classics ClubTM, The Writing ClubTM, etc. build *culture beneath techniqueTM* — i.e. an Haute CultureTM — to extend and reinforce the planning competences (Perdicoulis, 2014i)

2 Participants

UNDERSTAND the ‘why’ and ‘how’ of their situation (e.g. systems, processes, plans) with the help of appropriate diagrams (Perdicoulis, 2014e)

DEVELOP their own planning competences such as systems thinking, explicit reasoning, and problem formulation (Perdicoulis, 2014d)

DISCOVER alternative solutions (Perdicoulis, 2014m) and select the best through their own understanding, values, and reasoning (Perdicoulis, 2014d)

3 Scope

PER CASE Project-wide accompaniment (§ 1.2); competence-building (§ 1.3)

PER TASK Task accompaniment (§ 1.2); competence-building (§ 1.3)

4 Place

IN SITU Physically together (e.g. meetings)

REMOTELY Via telecommunications

5 Time

SYNCHRONOUS Interactive mode

ASYNCHRONOUS Work–feedback sequences

6 Consolidated Advice

PROMPT	REF.	PITH
<i>Plan genuinely</i>	(§ 6.1)	A plan should be original, well-crafted, and well-understood by all
<i>Care for good design</i>	(§ 6.2)	Projects call for good design, created by attentive teamwork
<i>Benchmark against the objectives</i>	(§ 6.3)	The most fair assessment criteria are the stated objectives
<i>Draw the causal mechanisms</i>	(§ 6.4)	Causality is best expressed and verified in causal diagrams
<i>Invest in essence</i>	(§ 6.5)	The fundamentals of life (e.g. education, quality) are to be nurtured
<i>Aim for ‘inbox zero’</i>	(§ 6.6)	‘Doing it right’ counts; ‘doing it promptly’ elevates the work

Experience-based recommendations to accompany the support (§ 1)

6.1 Genuine plan

A plan presents a formal problem^a, well-defined, solved, simulated, and assessed (Perdicoulis, 2017). More important than impressing or reassuring their clients, shareholders, voters, or employees, organisations must ensure that:

- the plan represents the organisation, being truthful and realistic
- everyone in the organisation understands thoroughly ‘how the plan works’
- the plan is capable of advancing the organisation in the intended direction

^a v. **formal problem** — Academic ActivismSM (Perdicoulis, 2014I)

6.2 Good design

Teamwork involves sensitive human interactions marked by different points of view, interests, and attitudes. While this diversity is potentially beneficial, it may also delay a project or even establish confusion. It is crucial to focus on the *good design* that is expected of the project — typically a prototype such as a plan, a system, or a process (Perdicoulis, 2016b).

6.3 Objective criteria

Whether *ex ante* or *ex post*, a fair assessment (Perdicoulis, 2014n) judges the respective expected or manifested states (*Z'*) against a set of criteria^a that represent the objectives (*Z*) of the action (*X*). Otherwise, there are many ways to be ‘unfair’.

^a v. **objective criteria** — Academic ActivismSM (Perdicoulis, 2014I)

6.4 Causal mechanisms

Several heuristics seek cause-and-effect relationships (i.e. causality) — for instance, precedence, proximity, similarity, covariation, and the all-time-favourite: the *sine qua non condition* (Perdicoulis, 2019). The proof of concept is provided by causal mechanisms^a (Perdicoulis, 2014e).

^a v. **mental models** — Academic ActivismSM (Perdicoulis, 2014I)

6.5 Effective investment

Despite seen as useless from utilitarian/ econometric points of view, obsessed with ‘quick returns’ or ‘productivity indicators’, it is crucial to always invest in:

- Education^a (i.e. competences & knowledge) — e.g. read, study, exercise, practise
- Quality^b (i.e. conduct & outcomes) — e.g. do a good job, create beautiful things

^a Personal or community investment (Perdicoulis, 2014d)

^b Sufficient for ‘effectiveness’; part of *efficiency* when complemented by simplicity and elegance (Perdicoulis, 2014a)

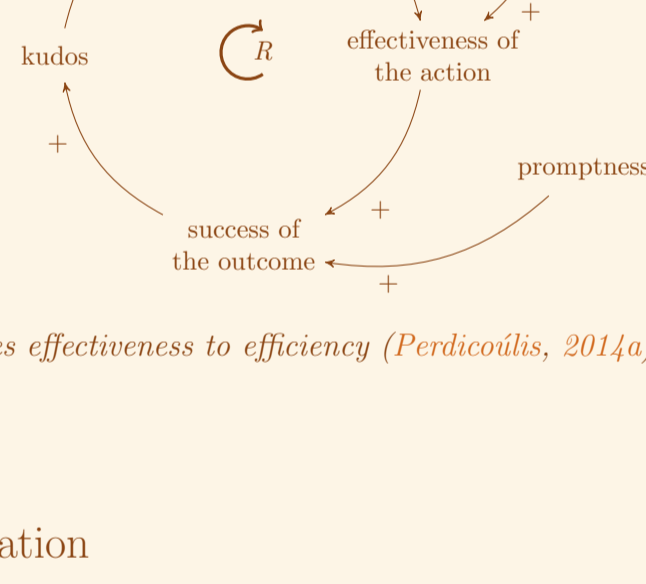
6.6 ‘Inbox zero’

A ‘prompt-action & ever-ready’ practice — easily remembered as ‘inbox zero’^a, from the email^b implementation of GTD^c — requires a continuous ‘on-guard’ attitude and concomitant preparation to make an *effective* job *efficient* (Perdicoulis, 2014a).

^a The state of ever-readiness is similar to the oriental ‘empty teacup’ practice — credits: M. Sato

^b e.g. *Airmail* app

^c *Getting things done* — a time-management method by D. Allen



Promptness *elevates effectiveness to efficiency* (Perdicoulis, 2014a) and is a key primer

7 Field Differentiation

BUILDING WHOLEHEARTED MENTAL MODELS^a

Situations — The complexity or ‘obscurity’ of situations hinders both understanding and control, and dynamics — some of them of political, and others of technical nature. Negotiations and open-mindedness help, while hidden assumptions hinder a healthy mental-modelling process. ‘Point thinking’ is awkwardly inadequate, while computational relations are markedly artificial.

Resolution — Facilitated mental-modelling is a group challenge; through argument visualisation it achieves understanding of otherwise obscure ‘mechanisms’ and alternative points of view (as well as interests); through common exploration it promotes healthy communication, search, and debate. Indeed, cutting through complexity and obscurity ends up being a deeply satisfying experience.

^a Differentiation manifesto (Perdicoulis, 2016b) — Organisation field (Perdicoulis, 2014o)

PREPARING OPERATIONS IN APPROPRIATE DETAIL^a

Variability — The scientific exploration of natural processes and employs registers such as chemical equations or time charts. On the other hand, humanly managed processes — i.e. operations — have registers (e.g. procedures, protocols, workflows) of varied formality: e.g. informal in social contexts, formal in business contexts, and demanding in the medical profession or the aerospace industry.

Predicament — Specialists aside, or those who ‘have got it right’ with general techniques for coordinating operations (e.g. project management), a number of organisations still have daedalian communication protocols, legendary procedures, and consequently search, and waste of precious resources as well as opportunities. Such situations can only improve.

Resolution — Deciphering or designing processes requires a clear definition of sequence (i.e. states and actions), and dynamics (e.g. parameters, methods), aggregation (e.g. detail), resources (e.g. people, materials, money), and disclosure (i.e. the information revealed to each stakeholder). Dealing with processes is prone to oversights and misjudgements, which are kept in check with operational care — and largely with education.

^a Differentiation manifesto (Perdicoulis, 2016b) — Operation field (Perdicoulis, 2014o)

CRAFTING STRATEGY WITH CONFIDENT UNDERSTANDING^a

Tradition — There are many ways to make high-level action plans — commonly known as ‘strategy’ — for organisations of the private and/ or the public domain. The traditional way is based on intuition and secrecy, as the master plan is prepared and remains in the director’s mind. Modern popular practice relies on ‘scientific’ methods based on metrics and analyses — and what could be more reliable than science?

Philosophy — Surprisingly, both the ‘intuition’ and ‘science’ models overlook confident understanding, and ways to clearly visualise and share the plan as well as the reasoning and assumptions behind it. Systems PlanningSM provides this ‘missing part’ — in association with original R&D and an empowering coaching/ consulting engagement, complemented by teaching/ training *quanto basto*.

Community — The way of Systems PlanningSM is not ‘natural’ for everyone, as rigour and reasoning are also expected of the beneficiaries. Hence, Systems PlanningSM seeks progressive and demanding people in enterprise, institutions, or government, curious to understand ‘how things work’ and in a position to ‘make things right’ — from start-up entrepreneurs, to experienced CEOs, to community leaders, to prime ministers.

^a Differentiation manifesto (Perdicoulis, 2016b) — Design field (Perdicoulis, 2014o)

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