Strategy Board™

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Abstract

The workshop adds concerns and commitments to the mental model of the system of interest (RBP) from distinct points of view (stakeholders), and thus facilitates the conception of strategy and creation of action proposals (DCD) in a negotiated manner.

1 Professional value

Situation Maps™ are the working grounds ('strategy boards') for making strategy with solid understanding and extended participation of stakeholders. Situation Maps™ are based on reverse blueprints (RBP) and prepare for the formulation of the plan in descriptive causal diagrams (DCD). Interests and positions can be marked in alternative reference conventions (e.g. SWOT, QCD), eventually leading up to the complete problem notation ('XYZ') of Systems Planning℠.

Graphic SWOT™ is a Systems Planning℠ interface to the ubiquitous SWOT analysis. The classic 'point-thinking' technique fails to provide insight into the *causes* as well as the *references* of its assessments, which makes its statements un-justified, non-verifiable, potentially incongruent, and thus practically useless for strategy-making. Graphic SWOT™ employs causal diagrams (RBP and DCD) together with procedural diagrams (e.g. CPD) to add the missing reasoning to strategy-making through explicit pathways and annotations.
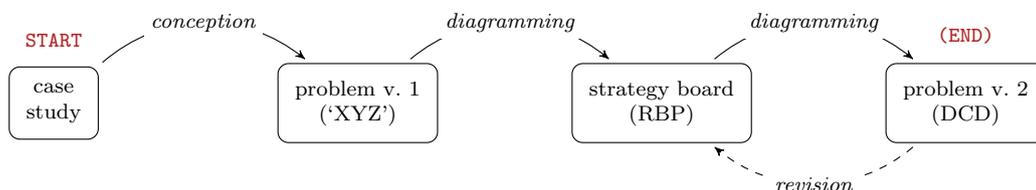
2 Workflow

FIGURE 1   The work to be carried out over four (4) hours; a number of 'loop' iterations may be necessary to achieve a satisfactory DCD

3 Programme

INTRODUCTION (1.5H)
- Exploring the situation — RBP[T] (Figure 2)
- Strategy Board™ — RBP[T] (Figure 2) with annotations
- Graphic SWOT™ — annotated RBP[T] and CPD[T] (Figures 3 and 4)
- The planning problem — XPD[M] (Figure 5)

WORK SESSION (4H)
- Work in groups (2–4 people)
- Interactive assistance

PRESENTATION, DISCUSSION, AND CONCLUSION (2H)
- Shared experiences
- Applicability issues

4 Technical notes

AUDIENCE
- *Strategists*: city, state, enterprise (e.g. administrators, executives), civil society
- *Consultants*: strategy-/ policy-making
- *Researchers*: strategy-making/ -assessment; *idem* for policy

COMPETENCES
- Conceive, discuss, and verify action, including constraints and opportunities
- Develop sensitivity and appreciation for causal relationships
- Think clearly how intended outcomes should arise from the proposed action
- Register and communicate this efficiently
- Elaborate solid causal arguments and verify them efficiently
- Think of acceptable causal explanations to be found in the strategy document
- Identify information in the strategy document, essential for the causal explanations

METHODS[a]
- Explicative causal thinking — ECT[M] (Figure 2)
- 'XYZ' problem definition — XPD[M] (Figure 5)

TECHNIQUES[b]
- Text mark-up — TMU[T]
- Reverse blueprints — RBP[T]
- Descriptive causal diagrams — DCD[T]
- Concise process diagrams — CPD[T]

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[a]v. Perdicoúlis, 2014b
[b]v. Perdicoúlis, 2014a

5 Protocols

TMU$_{[T]}$/ RBP$_{[T]}$/ CPD$_{[T]}$ XPD$_{[M]}$ (Fig.5)   RBP$_{[T]}$ DCD$_{[T]}$ QSM$_{[M]}$

Case Study → Problem (tentative) → Analysis (formal) → Problem (final) → Decision (plan)

Notes
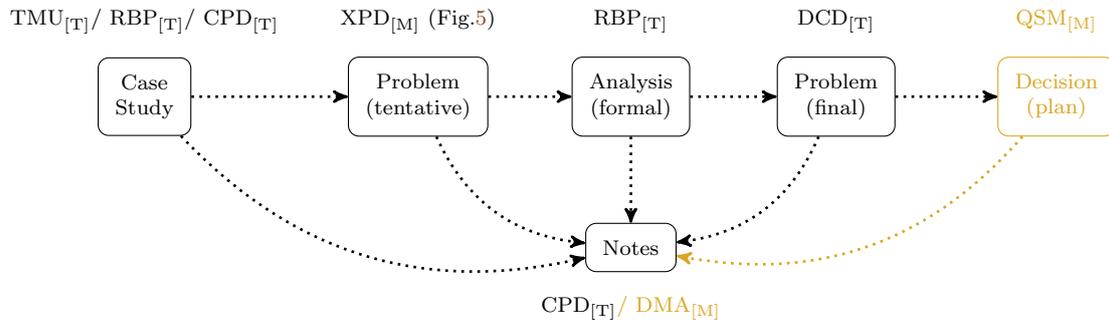
CPD$_{[T]}$/ DMA$_{[M]}$

FIGURE 2   Information-flow view of the ECT method; the parts in Gold are optional in this workshop (e.g. DMA), or belong to complementary workshops (e.g. QSM: Plan Workings™, Impact Tracing™)
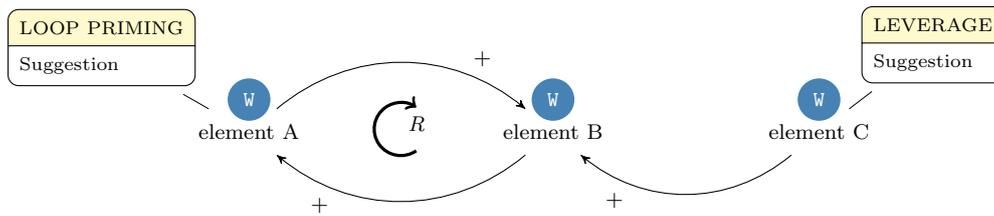
LOOP PRIMING
Suggestion

LEVERAGE
Suggestion

W element A R W element B   W element C

+   +   +

FIGURE 3   Generic reverse blueprint (RBP) as a Situation Map™ with Graphic SWOT™ mark-up — understanding *dynamics*

O state B

action 1   action 2

W state A   S state C
START   END
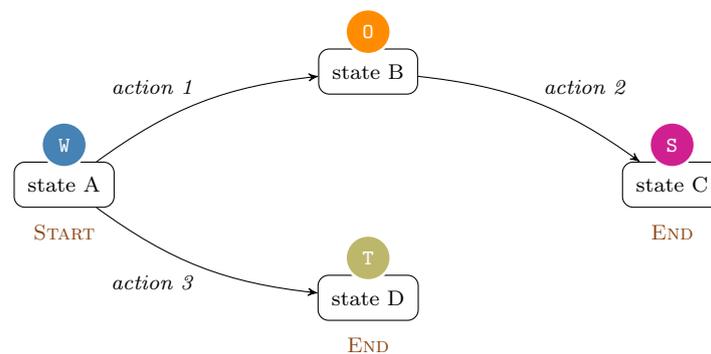
action 3

T state D
END

FIGURE 4   Generic concise process diagram (CPD) with Graphic SWOT™ mark-up — exploring *procedural pathways*
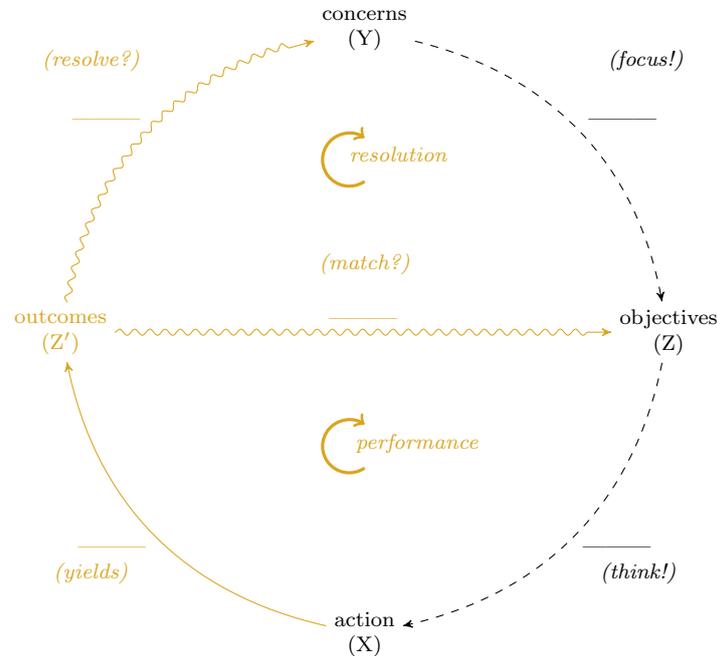
FIGURE 5   'XYZ' problem template with guidance (in parentheses) for the completion of the blanks; the parts in Gold belong to complementary workshops (e.g. Plan Workings™, Impact Tracing™)

6   Materials and preparation

CASE-STUDY/ WORK MATERIAL   Participants are welcome to bring their own case studies in (human) memory, or documented (e.g. in digital or printed media).

SOFTWARE   Diagramming can be carried out manually, with pencil and paper. Optionally, participants are welcome to use their own diagramming software, such as *Graphviz*, *LibreOffice Draw*, *OmniGraffle*, or *Visio*.

STENCILS

Perdicoulis, A. (2011d) *OmniGraffle* stencil for CPD [`.graffle`]
Perdicoulis, A. (2011c) *OmniGraffle* stencil for DCD [`.graffle`]
Perdicoulis, A. (2011b) *OmniGraffle* stencil for RBP [`.graffle`]
Perdicoulis, A. (2011a) *Graphviz* node-and-edge starter file [`.dot`]

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