



White Paper

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Does your strategic planning make a difference?

Andrew Rixon PhD

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Summary

Strategic-planning meetings can be a boring waste of time. Many leaders of organisations are aware of the need for strategic-planning meetings that really tap into the passion and creativity of their people, and thus ensure that everyone supports the agreed strategic direction. In addition, there is a need for techniques that sustain, in practical terms, the enduring impact of strategic-planning meetings. Using a recent example, this Anecdote ‘White Paper’ demonstrates the changed relationship patterns and real outcomes that can arise from an innovative approach to the conduct of strategic-planning meetings. The paper concludes with a real-life anecdote that insightfully reveals the true business value of such an approach.

Getting people engaged

Every year, strategic planning is a ‘grind’. Leaders must create the strategic plan for their parts of the business and ensure that everyone is engaged in the process. Moreover, they need a process that sustains the desired impact *after* the meeting closes.

It is always possible to attempt this in the ‘traditional’ way—with a facilitator out the front, driving and cajoling the group with the familiar tricks and techniques of ‘mind maps’, ‘post-it notes’, and suchlike. Some people will be engaged, but others will be sitting in the audience thinking to themselves that they would prefer to be somewhere else. And after the meeting, stories emerge—stories about how significant issues were not even considered; stories about how certain individuals drove their own bandwagons (yet again).

Faced with these realities, an insightful leader realises that virtually all of the time that has been spent on so-called ‘facilitated decision-making’ has been wasted—and that tomorrow is going to be the same as yesterday.

How can all this be done differently? How can strategic planning be made engaging, and perhaps even enjoyable? Is it not possible to organise a meeting in which *everyone* is actively engaged in the creation of a new plan for the future?

It *is* possible to do this, and it *is* possible to produce real change in staff members. The only problem is that senior management usually wants hard facts and figures on any proposed changes to the ‘tried and true’ methods of strategic planning. The present paper holds the key to the next step in the evolution of the organisation, and of the people in it.

A different type of meeting

Strategic planning must tap into the passion and creativity of people, but this is unlikely to be achieved with ‘traditional’ facilitated methods. There is an alternative. ‘Open Space Technology’ is a meeting methodology whereby the participants create their own agenda—an agenda that really reflects what they are passionate about. Using this technique, participants organise themselves to spend time discussing the issues that really matter to them. At the end of the day, tasks are identified and people volunteer to make a difference to the aspects of the plan that they really care about.

The creator of this method, Harrison Owen, has articulated four principles and one law to guide an ‘Open Space’ meeting.

The *principles* are as follows.

- Principle 1: Whoever comes, are the right people.
- Principle 2: Whatever happens is the only thing that could have happened.
- Principle 3: Whenever it starts is the right time.
- Principle 4: When it is over, it is over. (A corollary is: when it’s not over, it’s not over.)

The one *law* of ‘Open Space’ is the ‘Law of Mobility’—that if participants find themselves in situations in which they are neither learning nor contributing, they should move to somewhere where they can.

‘Open Space’ works in any situation in which there is:

- a real issue of concern;
- diversity of players;
- complexity of elements;
- passion (including conflict); and
- a need for a fast response.

Real communication networks

Organisational charts suggest that knowledge flows through a rigid hierarchy. But this does not reflect reality. Mapping the *relationships* that actually exist within an organisation, rather than the hierarchy that is depicted on the organisational chart, is an effective way of understanding the real patterns of communication that operate. Many of these are ‘invisible’; indeed, they are often quite different from the rigidities of an organisational chart. This technique of mapping relationships within organisations is commonly known as ‘Social Network Analysis’.


Social Network Analysis can be used to identify those who are the ‘connectors’ within an organisation, those who are the ‘knowledge hubs’, and connections that represent critical ‘break points’ in the organisation’s networks (that is, a point at which a potential break in communication would clearly produce a disruption to knowledge flow). More generally, Social Network Analysis can demonstrate the overall quality of an organization’s structure of relationships—indicating whether it is ‘well connected’, or ‘sparsely connected’, or ‘disconnected’.

Real impact

When it comes to demonstrating real impact and real change, leaders require a technique that allows them to demonstrate change in implicit knowledge flows, social interactions, and emerging leadership. The following example is taken from an ‘Open Space’ strategic-planning meeting that was conducted for a large scientific and industrial research organisation. The meeting’s theme was: “How can we do our science and business development with even greater impact? The Issues and Opportunities”.

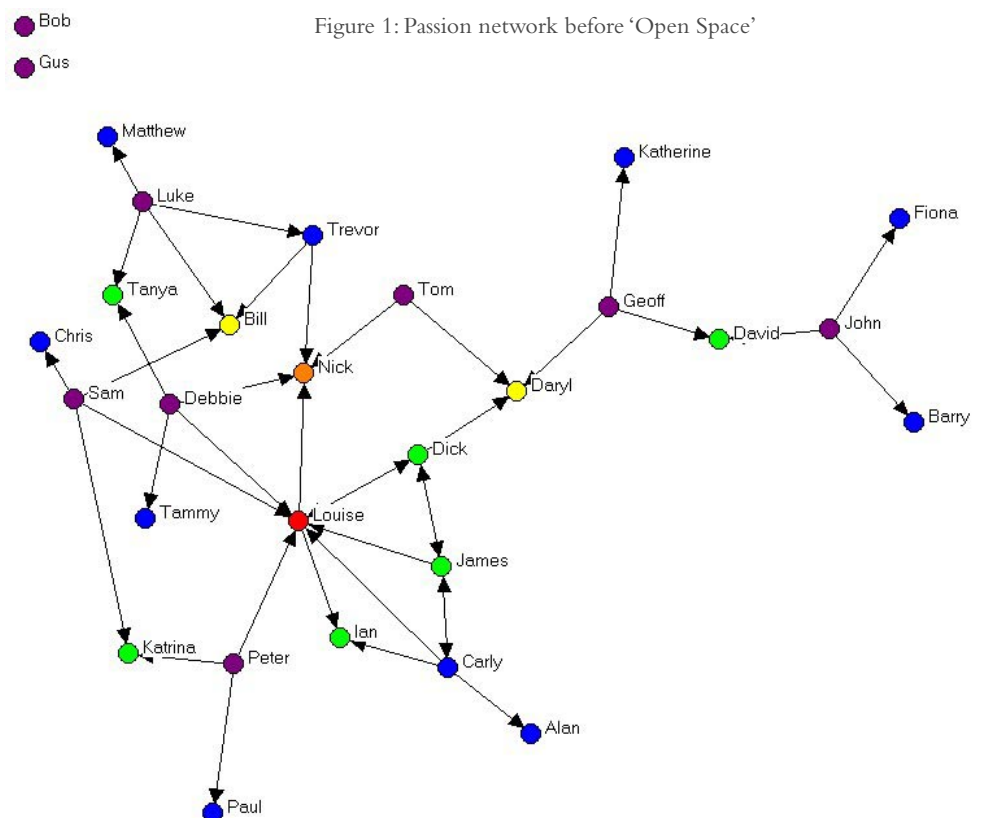
Two weeks before the meeting, a Social Network survey was sent out. This asked each staff member to list up to four people who, in the surveyed

staff member’s opinion, were *likely to feel passionate* about the theme. A week after the meeting, each participant was again asked to list up to four people who, in the opinion of the surveyed participant, *actually felt passionate* about the theme.

Figure 1 illustrates the ‘passion network’ before the meeting. The arrows show who nominated whom as likely to be passionate about the theme. By counting the number of arrows into each node (person) it is possible to obtain an indication of the degree to which that person was considered likely to be passionate. A simple colour scaling was used to represent the grading of scores for the ‘In-Degree’. The highest score was represented on the ‘red end’ of the colour spectrum, , whereas the lowest score was represented on the ‘violet end’ of the colour spectrum.

Several features stand out in the social network depicted in Figure 1. First, the social network was, in general, dispersed and sparse. Secondly, several distinct cliques were apparent. Thirdly, the social network had a relatively low awareness of the level of passion among colleagues—with many nodes being coloured blue or purple (low scores). Finally, it was apparent that the social network in Figure 1 accurately reflects a ‘traditional’ corporate hierarchy.

Figure 1: Passion network before ‘Open Space’



A more detailed analysis reveals that the person who was most often nominated as likely to be passionate about the theme (coloured red) was 'Louise'—who was the senior executive leader and sponsor of the meeting. The person who was nominated next most often as likely to be passionate (coloured orange) was 'Nick'—who was a senior science director. The two yellow-coloured nodes ('Bill' and 'Daryl') were team leaders in the division, and it is of interest that there was a clear clustering of team members around each of these team leaders.

Figure 2 illustrates the social networks that emerged from the results of the post-meeting survey.

There are three important changes to note in the social networks depicted in Figure 1 and Figure 2.

First, there was distinct change in the structure of the networks. The social network of Figure 2 demonstrates a more connected and integrated network than that of Figure 1, with no definite cliques apparent in Figure 2. It is apparent that the 'Open Space' participants had developed a greater awareness of colleagues whom the participants perceived as being passionate about the theme.

Secondly, Figure 1 shows two isolated people who were quite disconnected from the wider social network in the pre-meeting assessment. However, in Figure 2, both of these people, 'Bob' and 'Gus', emerged as being widely recognised as passionate about the theme.

Thirdly, there is a 'flattening' of the hierarchies between Figure 1 and Figure 2. Even though Figure 2 shows that 'Louise', the senior executive leader, still received most votes as a passionate person within the network, the traditional hierarchies (in terms of directors and team leaders) that were apparent in Figure 1 virtually disappeared in Figure 2. In fact, three of the four orange-coloured nodes (second-highest perceived passionate people) were not team leaders or directors in Figure 2; rather, they were people at the 'grass roots' of the organisation.

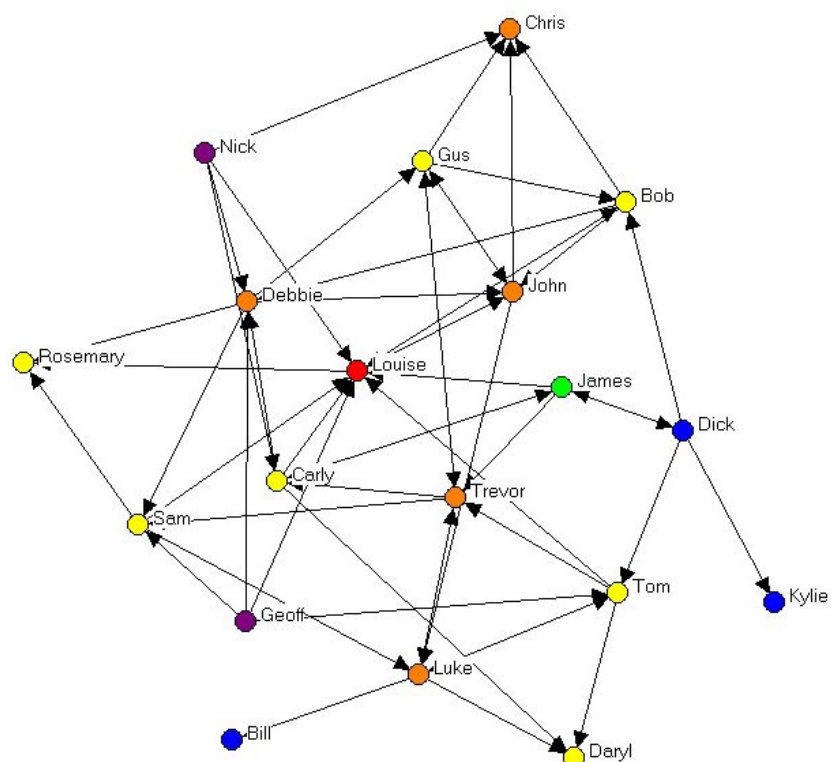
In addition to the above changes in the structure of the networks, it is interesting to note that some people who emerged as being popularly considered 'passionate' by their colleagues

were participants who neither raised topics in the initial agenda-setting phase of the meeting, nor championed any 'action sessions' thereafter. It would seem that their passionate sharing of their personal anecdotes during the discussion sessions made a significant impression on their colleagues—and thus altered perceptions of who were 'passionate' in the workplace.

A concluding anecdote

After the strategic-planning meeting and the Social Network Analysis had been completed for the organisation, three colour copies of the social-network diagrams (Figures 1 and 2) were provided to the senior executive sponsor of the project. These social-network diagrams have subsequently become a 'talking point' among many people within the organisation—including senior management. The significance of this was reflected in a chance meeting with an executive of the organisation in the transit lounge of an airport. His first words of conversation were about these diagrams. It was immediately apparent that these social networks have provided this executive with revealing insights into how his organisation could be more effective—and perhaps why the 'traditional' approaches have failed.

Figure 2: Passion network after 'Open Space'



For more information on 'Open Space' techniques, Social Network Analysis, and the creation of real sustainable change in your organisation, contact Andrew Rixon at: andrew@anecdote.com.au

Dr Andrew Rixon is a director of Anecdote Pty Ltd. Anecdote is focused on helping organisations to improve their performance using narrative (story) techniques, concepts from complexity science, and tools and techniques drawn from the wide discipline of knowledge management.