

JAMES A ROBERTSON AND ASSOCIATES

EFFECTIVE STRATEGIC BUSINESS SOLUTIONS



STRATSNAP® - STRATEGIC SNAPSHOT® PROCESS



Process Guidelines

To thrive do the right things (strategy) well (tactics)

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BEFORE THE START OF THE WORKSHOP



- 1. Determine Workshop Sponsor**
- 2. Determine Workshop Objective**
- 3. Determine Focus Questions**
 - Concise
 - Focussed
 - May not be obvious
 - The right questions to get the required answers
 - e.g. Critical concerns or critical questions

BEFORE THE START OF THE WORKSHOP



- 4. Agree Planning Period -- 3 years or other**
- 5. Agree Number of Planning Iterations**
- 6. Identify representative delegates**
- 7. Classify and Group Delegates if required (functional / locational or other grouping)**
- 8. Issue agenda with proposed focus questions / statements**

BEFORE THE START OF THE WORKSHOP REQUIREMENTS FOR SUCCESSFUL OUTCOME:



1. Tool (2%)
2. Facilitator and Facilitation Technique (3%)
3. Method (4%)
4. Focus Question (14%)
5. Delegate Group Representivity (17%)
6. Mandate (20%)
7. Sponsor and leadership (40%)

All are required for
a successful
outcome but
without the last
three factors the
first four cannot
deliver a valuable
result

STRATEGIC SNAPSHOT© PROCESS



START OF WORKSHOP PROCESS

OUTLINE OF THE STRATEGIC SNAPSHOT[©] PROCESS



The following items will take place one step at a time:

- 1. Brainstorm all points relating to the focus question**
- 2. Based on the results of the brainstorming each person determines their personal view of the seven critical factors**
- 3. Collectively synthesize the seven critical factors**
- 4. Individually rank and weight the critical factors in terms of personal view of relative importance**

OUTLINE OF THE STRATEGIC SNAPSHOT PROCESS



- 5. As time permits discuss the different "views of the mountain" = different perceptions of the situation**
- 6. Individually score the seven critical factors in terms of:**
 - Historic - How well were we doing "n" years ago**
 - Current - How well are we doing today**
 - Forecast - How well will we be doing in "n" years if nothing changes**
 - Objective - How well would we like to be doing in "n" years**

OUTLINE OF THE STRATEGIC SNAPSHOT PROCESS



- 7. As time permits discuss the scores and the overall score trend**
- 8. Discuss the gap**
- 9. AS A SEPARATE PROCESS undertake a gap analysis to determine the actions required to close the gap - may form part of the current workshop OR a separate workshop OR be undertaken in-house**

PROCESS GUIDELINES



DETAIL FACTOR BRAINSTORMING

DETAIL FACTOR BRAINSTORMING



1. List all thoughts regarding the focus question
2. No discussion
3. There are no wrong answers
4. All thoughts, no matter how outrageous they may seem
5. Everything that might possibly have a bearing

Brainstorm Now
Then Check Points Next Slide

DETAIL FACTOR BRAINSTORMING THE ELEPHANTS UNDER THE TABLE



1. Check for blind spots

- What is missing?
- Other stakeholders?
- The awkward person who is missing?
- Other perspectives?
- Specialists?

2. The elephants under the table -- undiscussables / unmentionables

- Blank sheet of paper with standard pens
- Write about the weather / sport if you have nothing to add

Look for
possible
causes of
failure

Write your points privately and
hand in

PROCESS GUIDELINES



CRITICAL FACTOR DETERMINATION

WHAT ARE CRITICAL FACTORS? A DOWN TO EARTH EXAMPLE



TO TRAVEL 1,000 KILOMETERS FROM HERE BY MOTOR CAR TO A SPECIFIC DESTINATION YOU NEED:

1. Car (own, rent, taxi, etc)
2. Driver
3. Petrol / Money for Petrol
4. Car in working order (engine works, tyres, etc)
5. Map or directions to get there
6. Experienced driver, roadworthy car
7. Nice comfortable car, airconditioning, make, etc

FIVE (5) ARE CRITICAL, TWO ARE NOT!

Continued /...

CRITICAL FACTOR DETERMINATION

WHY SEVEN FACTORS?



1. Close to 80:20 (86:14) but have found that **in practice seven works better than five or six**
2. Presentations - for ease of understanding, between five and ten slices on a pie chart are optimum - average - **7.5**
3. The average person can manage **seven** plus or minus two abstract concepts simultaneously
4. The average person can manage **seven** plus or minus two direct reports

Continued /...

CRITICAL FACTOR DETERMINATION SYNTHESIS



1. Seven succinct (concise) statements effectively 80:20
2. The Seven Factors which most effectively summarize the Critical Issues addressed by the detailed list that has just been brainstormed
3. Each factor must be unique and exclusive
4. No overlap - meaningful, succinct statements
5. Not necessarily on brainstorm list

Determine your seven factors
now

CRITICAL FACTOR DETERMINATION

CRITICIZE



1. Capture one person's synthesis (sponsor if appropriate)
2. Capture "most different" synthesis
3. Determine if there is a second dimension
4. Capture all other synthesis items
5. Synthesize and integrate into one or two sets

Synthesize Now

CRITICAL FACTOR DETERMINATION

CRITICIZE



1. Check for logical consistency -- are there two dimensions?

2. Composite or exclusive statements?

3. Check for blind spots

- What is missing?
- Other stakeholders?
- The awkward person who is missing?
- Other perspectives?
- Specialists?

Look for
possible
causes of
failure

Criticize Now

HEADINGS AND SHORT NAMES



1. If necessary convert to positive action orientated statements
2. Develop headings for each factor
3. Develop short names if different from headings

PROCESS GUIDELINES



FACTOR RANKING

Please write your name and initials on the worksheet

FACTOR RANKING :



1. Rank the factors in order of importance
2. Number the **MOST important** factor 1
3. Number the **LEAST important** factor 7
4. All factors are important
5. Avoid giving two factors the same rank unless you are firmly of the opinion they are of identical importance

Rank Items Now

PROCESS GUIDELINES



FACTOR WEIGHTING

FACTOR WEIGHTING :



1. Refer to the ranking in allocating the weights - if when weighting you revise the ranking that is fine
2. Total of weights for all seven factors must equal 100%
3. Spread weights to reflect relative importance
4. All seven factors are important but some are more important than others

Continued /...

FACTOR WEIGHTING :



5. Typically one or two, if not effectively addressed, will give rise to failure of the overall plan
6. Typically one or two can only succeed if certain other factors succeed
7. Try and spread the weights over a range of about 5% for the lowest and 30% for the highest

Continued /...

FACTOR WEIGHTING :



STEP 1: HIGHEST WEIGHT

7. Select the factor that you consider **MOST IMPORTANT**
 - a. If you consider it **far MORE** important than any other factor weight it between **30% and 50%**
 - b. If you consider it only **slightly MORE** important than several other factors, weight it between **20% and 30%**

Weight Most Important Factor
Now

FACTOR WEIGHTING :



STEP 2: LOWEST WEIGHT

8. Select the factor that you consider **LEAST IMPORTANT**
 - a. If you consider it **far LESS** important than any other factor weight it between **1% and 7%**
 - b. If you consider it only **slightly LESS** important than several other factors, weight it between **8% and 15%**
 - c. Only use **0%** if you consider the factor **totally irrelevant**

Weight Least Important Factor
Now

FACTOR WEIGHTING :



STEP 3: DISTRIBUTE WEIGHTS

9. Spread the remaining weight across the remaining factors
10. Consider the relative importance of each two factors and ensure that the factor that is more important than the remaining factors has a greater weight
11. Try and avoid giving two factors the same weight, generally one will be slightly more important than the other

Continued /...

FACTOR WEIGHTING :



STEP 3: DISTRIBUTE WEIGHTS CONTINUED

12. If two factors are **very close** in relative importance the weight gap between them should be **small**
13. If one factor is very **much more important** than another factor the weight gap between them should be **large**
14. If you have difficulty with mental arithmetic then work with round numbers and as a second step incrementally adjust pairs of items one up and one down e.g. 10%, 10%, 10% => 8%, 10%, 12%

Spread Remaining Weight Across
Remaining Factors Now and then
Hand In Worksheets

PROCESS GUIDELINES



FACTOR WEIGHTING SHARES

FACTOR WEIGHTING SHARES KNOWLEDGE & EXPERIENCE PERSPECTIVES



It is almost certain that at this moment, every person in this room thinks that they have understood exactly what has been said.

BUT

If we were to analyse in detail what each person is thinking about these topics we would find drastically different views!

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FACTOR WEIGHTING SHARES

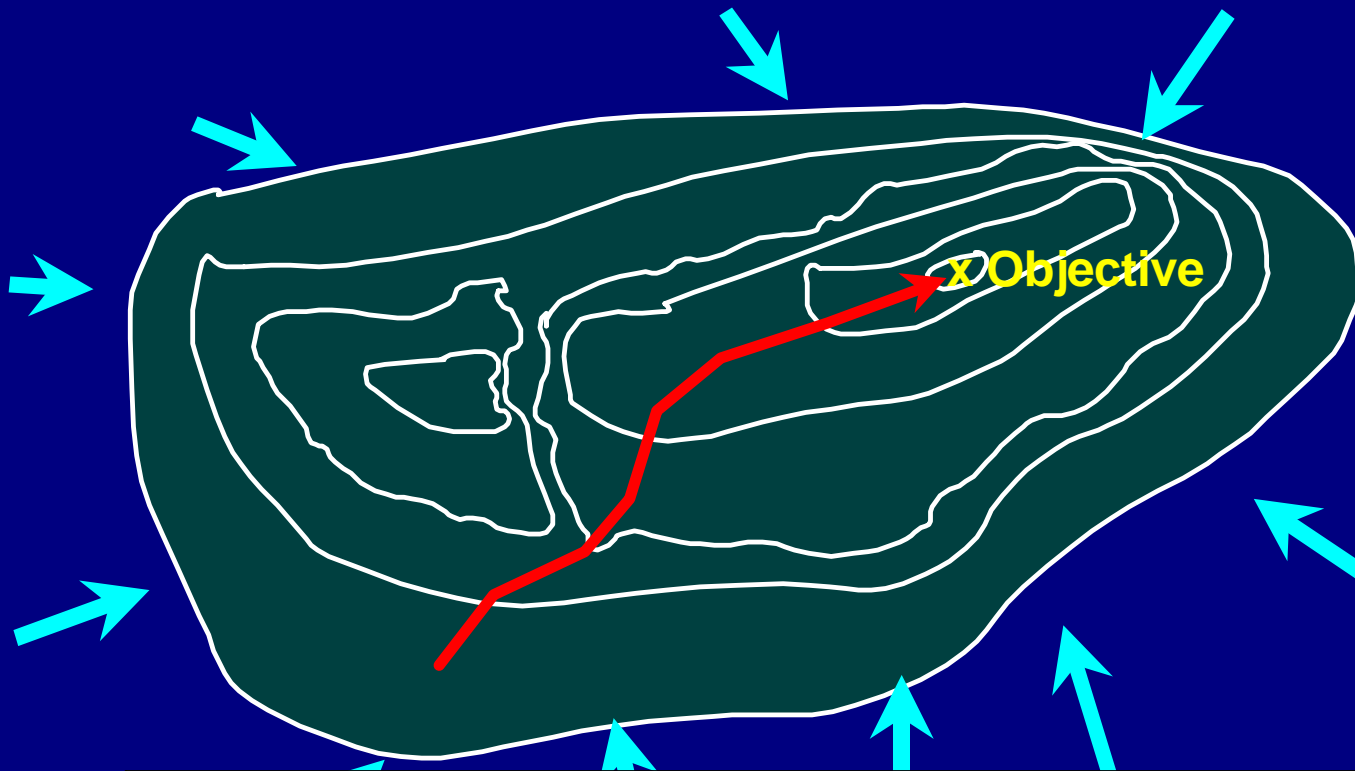
THE DIFFERENT VIEWS OF THE MOUNTAIN



Continued /...

FACTOR WEIGHTING SHARES

THE DIFFERENT VIEWS OF THE MOUNTAIN



Reality:

Each person has a unique view

It is desirable to choose ONE view for designing the solution

**Together we can find the best way to the objective :
once we have agreed it we must stick to it!
REMEMBER TIME IMPACT**

Shares Now

PROCESS GUIDELINES



1. Make notes as necessary of what other people say
2. Draw conclusions
3. Document

PROCESS GUIDELINES



Revise weights (choice)

**Revise Weights Now If
You Want To**

PROCESS GUIDELINES



FACTOR SCORING

FACTOR SCORING :



1. Factor scores are allocated on a **range of 0 to 10**
 - a. Where **0** (zero) indicates that the performance could **NOT BE WORSE** - in the world (or other benchmark you agree)
 - b. and **10** indicates that the performance could **NOT BE BETTER** - in the world (or other benchmark you agree)
2. **Each factor is scored separately** from 0 to 10

Continued /...

FACTOR SCORING (A BROAD INTERPRETATION)



- 0 = Abysmal - could not be worse anywhere in the world**
- 1 = Extremely weak**
- 2 = Very weak**
- 3 = Weak**
- 4 = Mediocre**
- 5 = Average - could be better / could be worse**
- 6 = Acceptable**
- 7 = Strong**
- 8 = Very strong**
- 9 = Extremely strong**
- 10 = Exceptional - could not be better anywhere in the world**

Continued /...

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3.3

6.7

Cause for serious concern

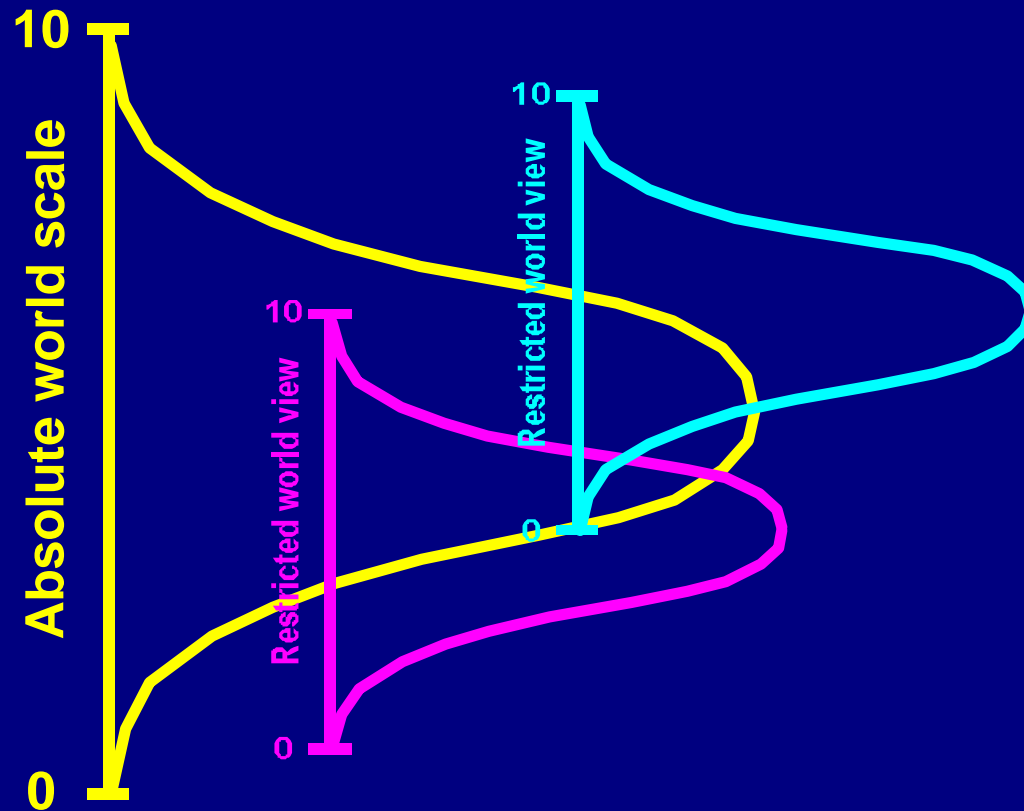
One third to two thirds 68% probability of occurrence

World Class

Decimal values (fractions) such as "4.7" can be used if required

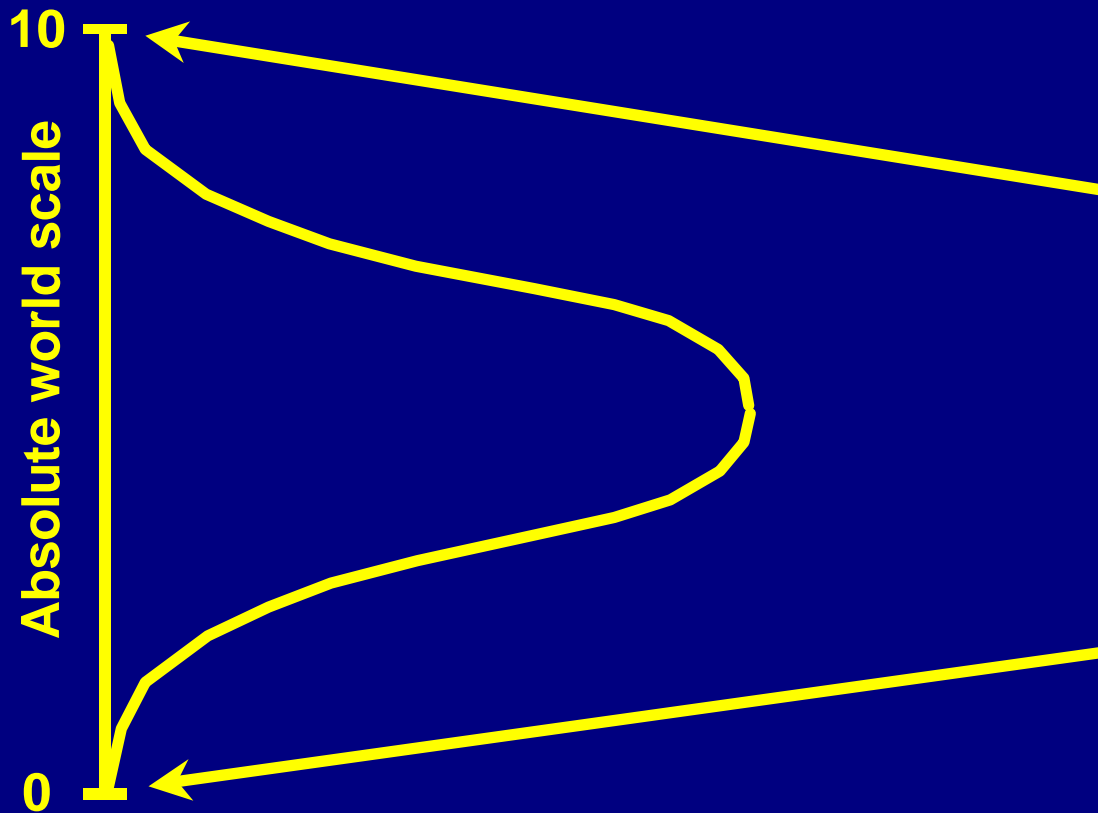
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THE CHALLENGE OF YOUR PARADIGM WHAT DO YOU NOT KNOW



Continued /...

THE CHALLENGE OF YOUR PARADIGM MOUNTAINS



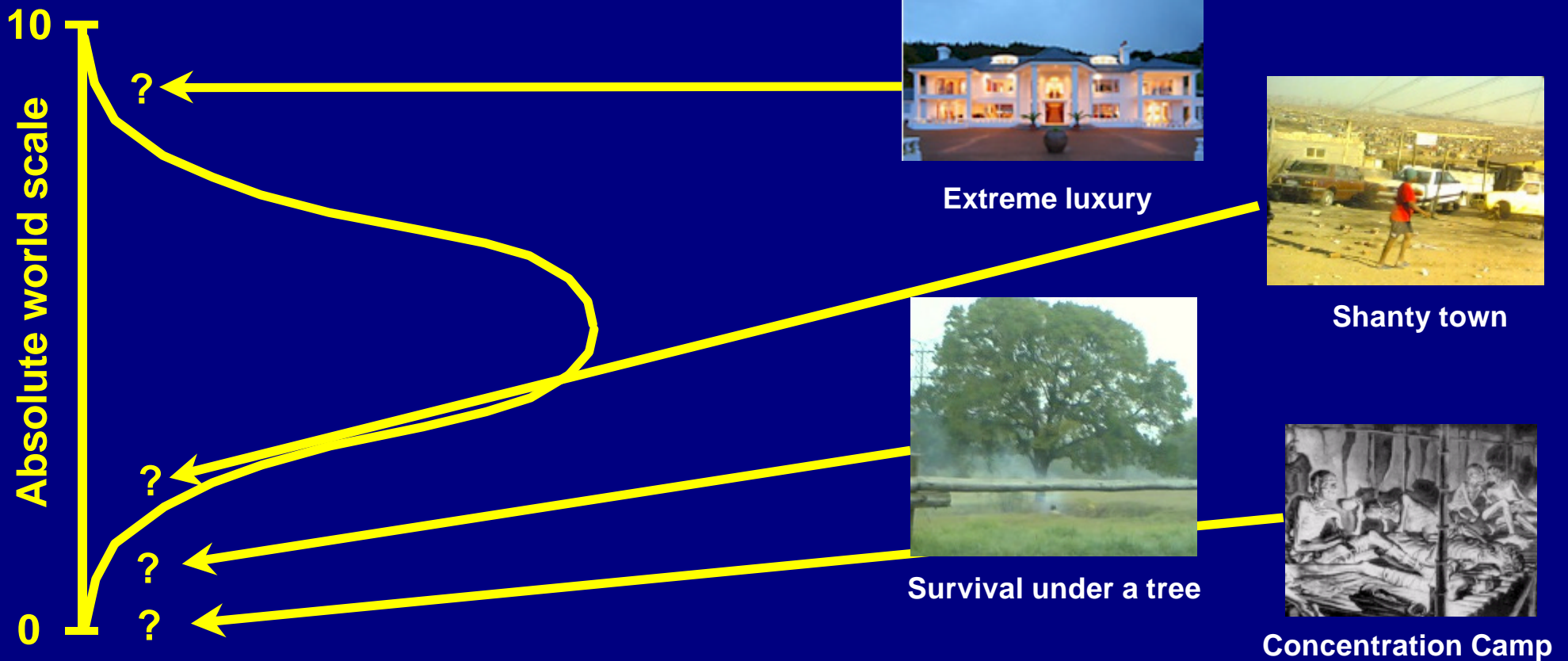
Mount Everest -- highest mountain in the world



Bowling Green -- absolutely FLAT -- ZERO SLOPE

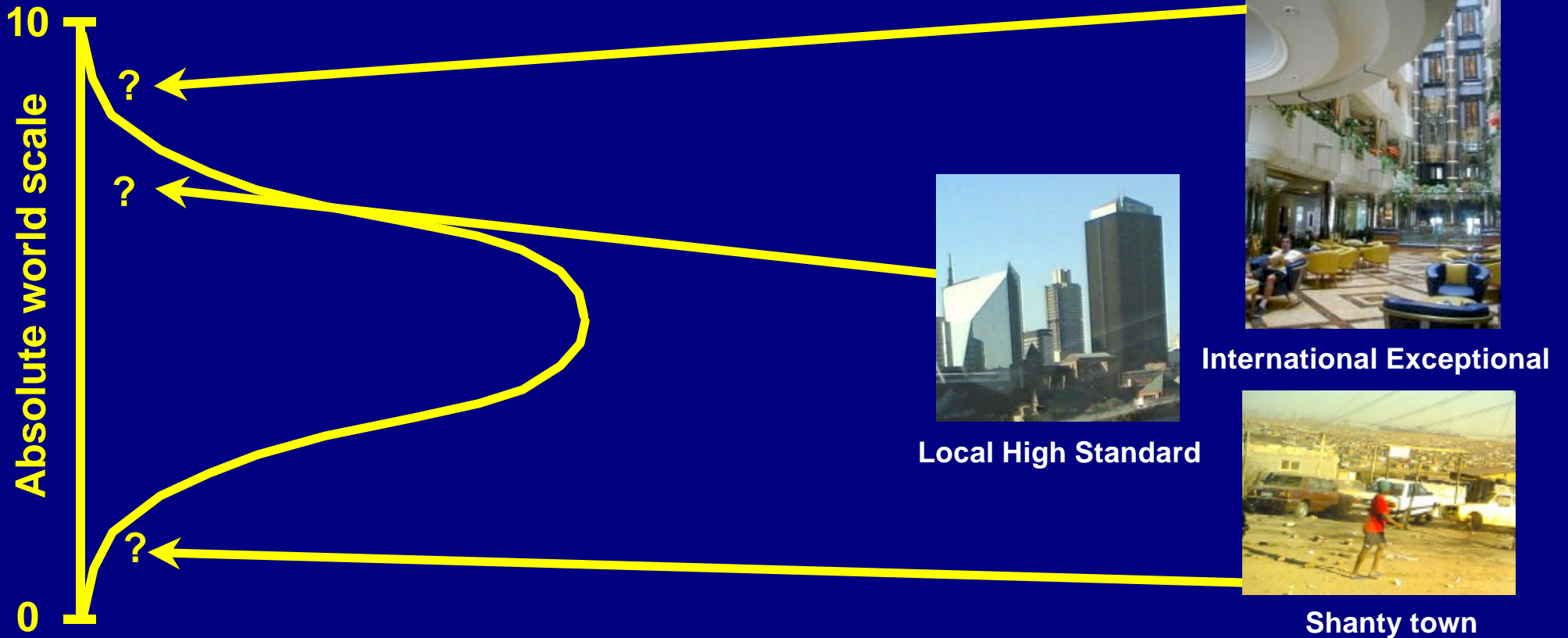
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THE CHALLENGE OF YOUR PARADIGM LIVING CONDITIONS



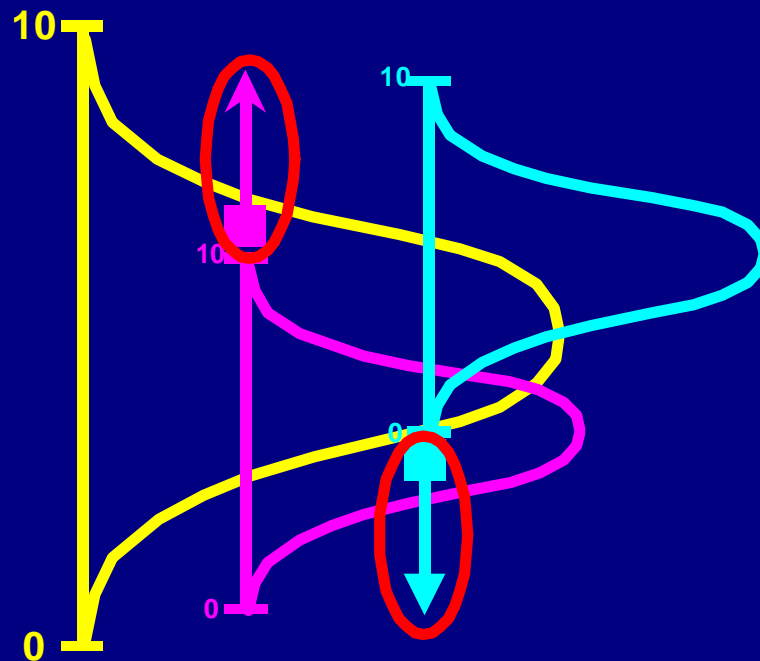
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THE CHALLENGE OF YOUR PARADIGM BUSINESS STANDARDS



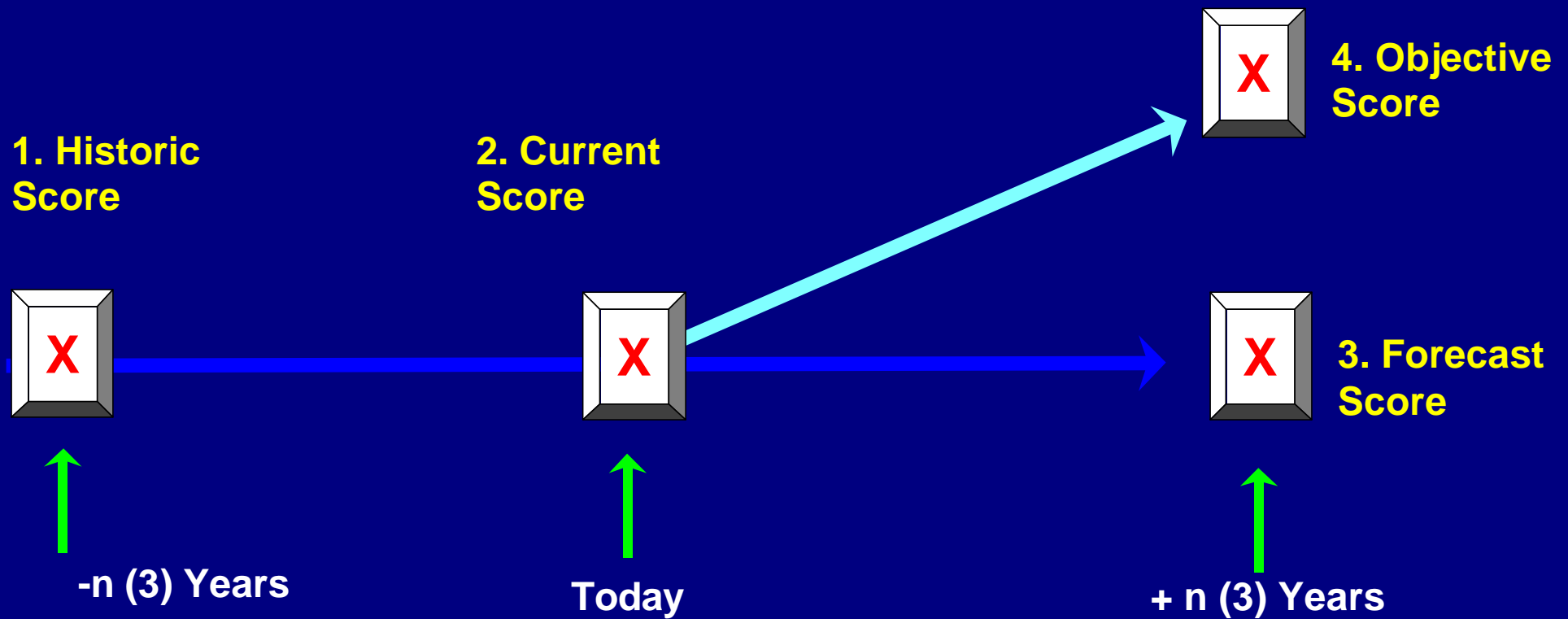
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STRETCH YOUR WORLDVIEW WHILE SCORING



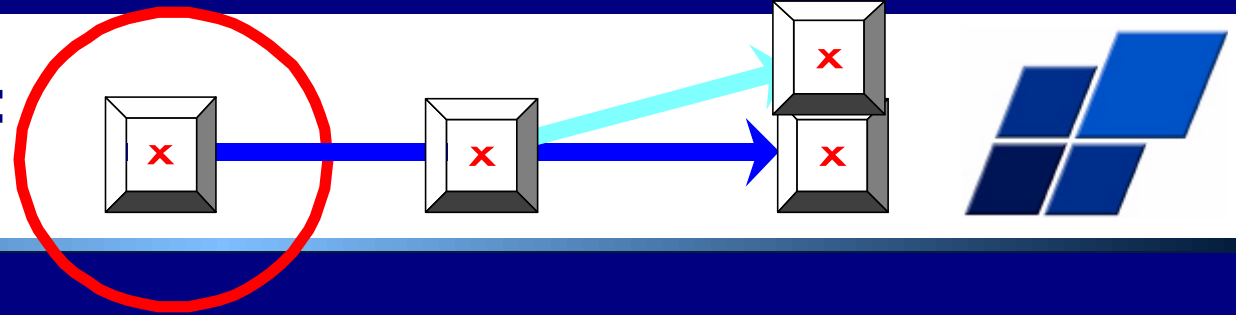
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FACTOR SCORING :



Continued /...

HISTORIC SCORING :

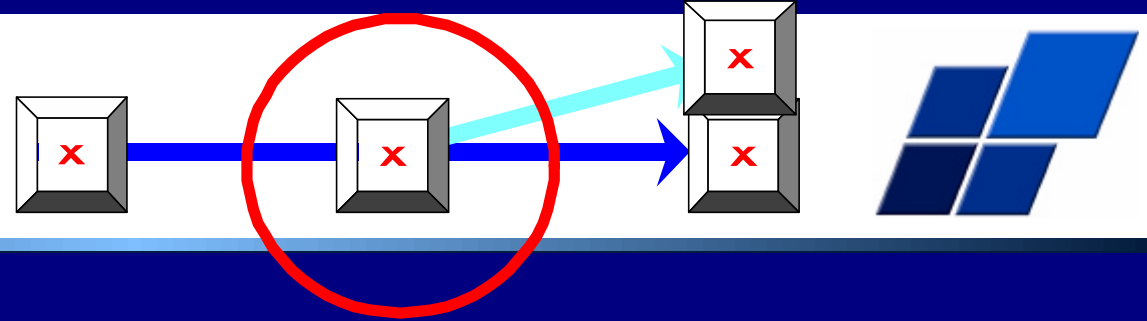


1. Rating of performance at a time equal to the planning period in the past
2. HISTORIC
3. How well were we doing then?
4. Keep in mind how bad it could have been and how good it could have been
5. Blank if you do not know how it was

0 = Could not be worse
10 = Could not be better

Score Historic Now

CURRENT SCORING :

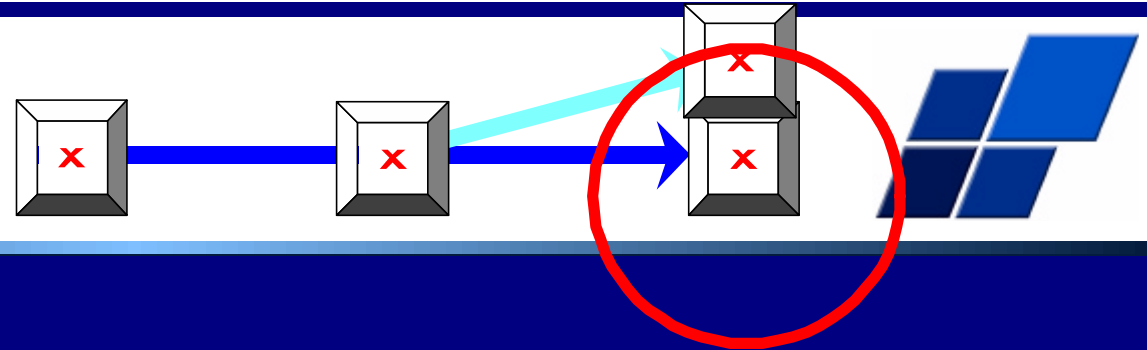


1. Current rating of performance
2. TODAY
3. How well are we doing now?

0 = Could not be worse
10 = Could not be better

Score Current Now

FORECAST SCORING :

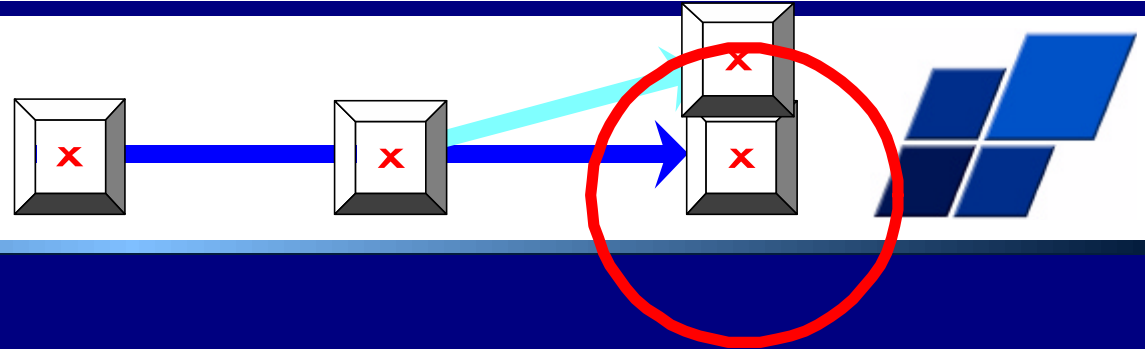


1. What you expect the score would be if this planning exercise:
 - a. Did not happen
 - b. Did not lead to any action
 - c. Does not deal with what you consider to be the critical issues
2. The forecast represents where this organization will be without meaningful and effective NEW action

0 = Could not be worse
10 = Could not be better

Continued /...

FORECAST SCORING :



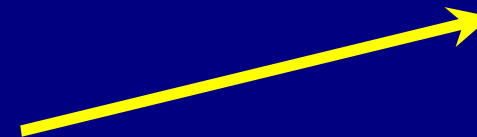
3. **Equal** to CURRENT if you think that there will be **NO** material change in the planning period



4. **Less** than current if you think that the situation is **deteriorating** with no sign of other actions likely to give rise to improvement



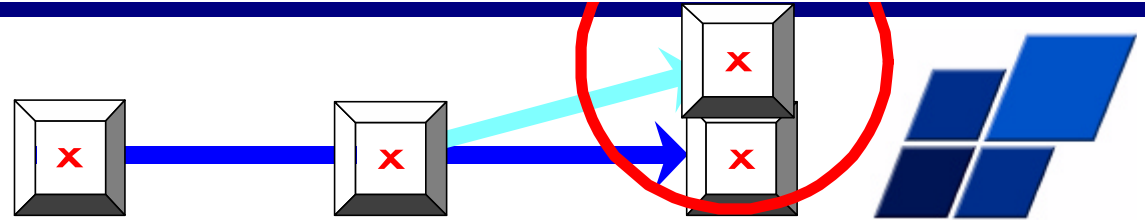
5. **Greater** than current if you think that the situation is **improving** as a result of other actions



0 = Could not be worse
10 = Could not be better

Score Forecast Now

OBJECTIVE SCORING :

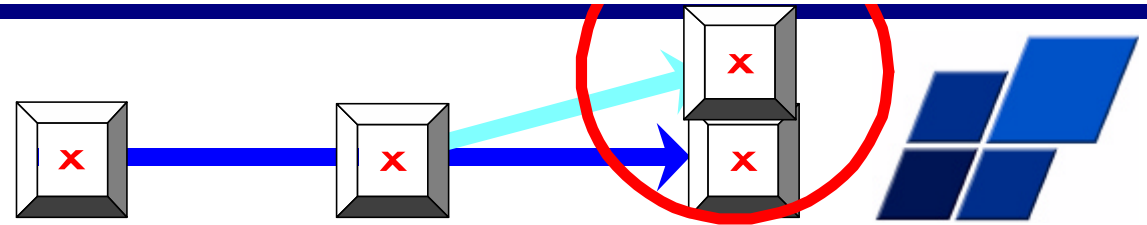


1. How you would like it to be after the planning period
2. Aim for the Stars in order to Hit the Tree Tops (set a stretch target)
3. Take account of the practical limitations on improvement (i.e. be optimistically realistic)

0 = Could not be worse
10 = Could not be better

Continued /...

OBJECTIVE SCORING :

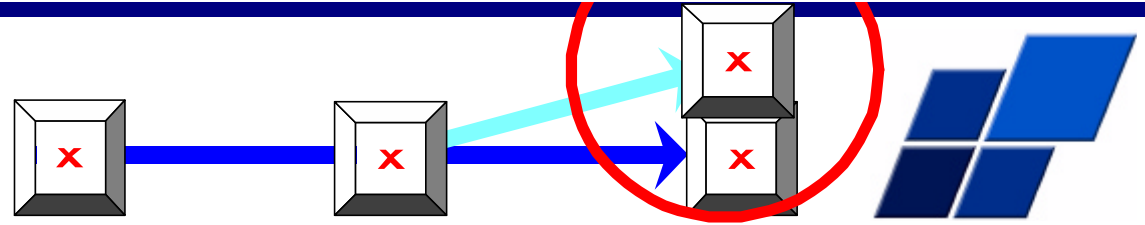


4. Recognize that you would probably be satisfied if your child obtained 60% at the end of their school career and would be very happy if they obtained 80%
5. The objective should be **EQUAL** to or **LARGER** than the **forecast** score
6. **Objective less than forecast is NOT valid**

0 = Could not be worse
10 = Could not be better

Continued /...

OBJECTIVE SCORING :



7. It is easier to achieve major improvement on a very low forecast score than on a high forecast score
8. Major improvement is probably not necessary for a high forecast score

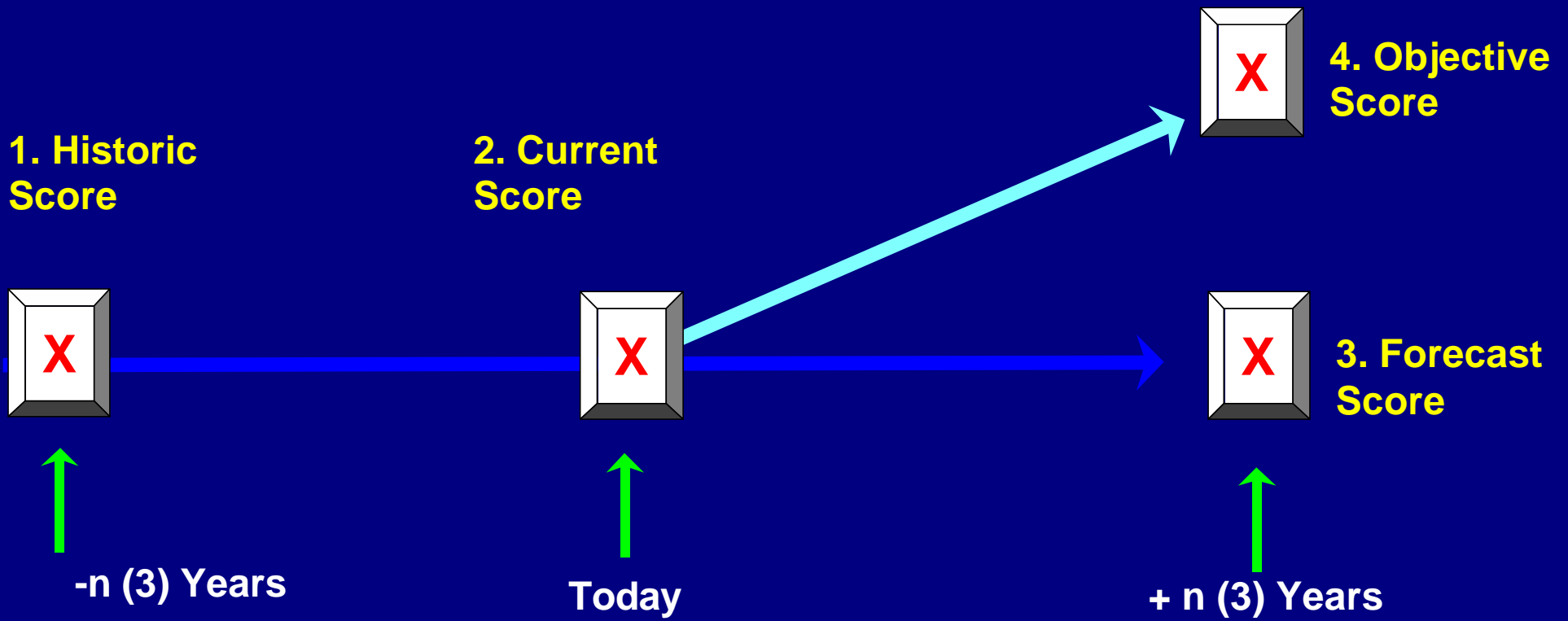
0 = Could not be worse
10 = Could not be better

Score Objective Now and then
Hand In Worksheets

FACTOR SCORING :



RECAP



0 = Could not be worse
10 = Could not be better

FACTOR SCORING (A BROAD INTERPRETATION)



- 0 = Abysmal - could not be worse anywhere in the world
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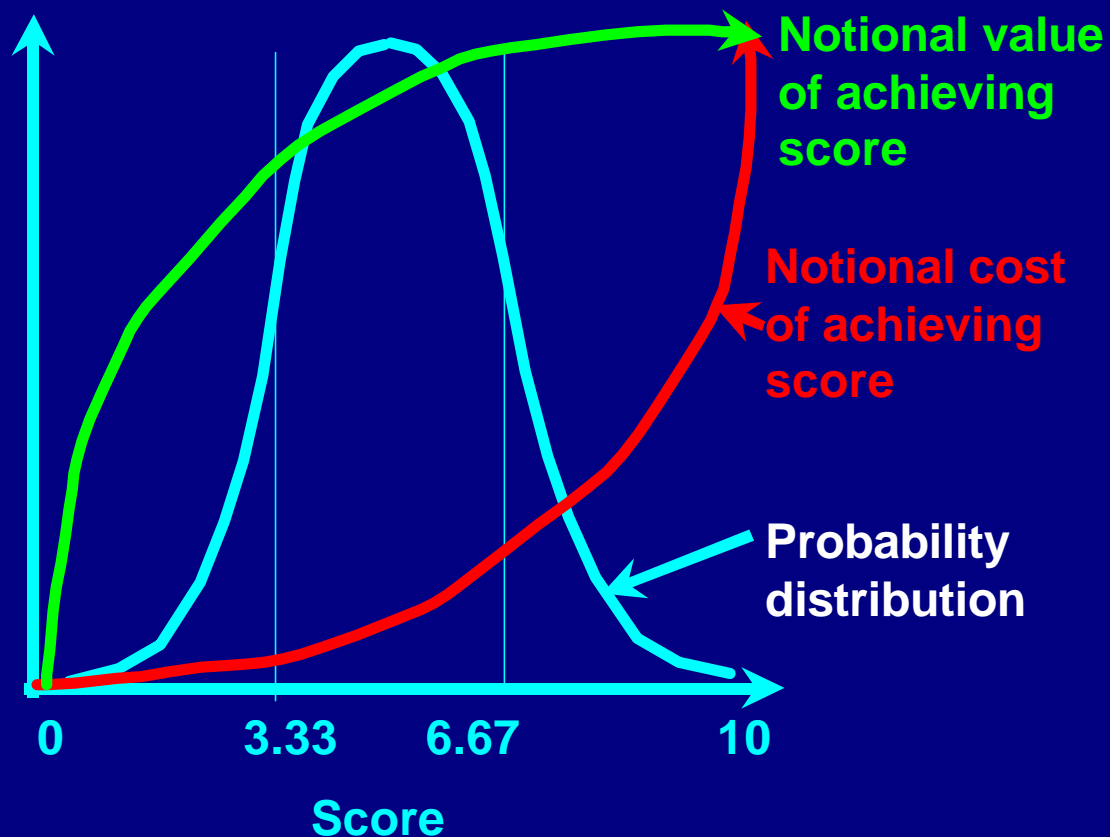
Cause for serious concern

One third to two thirds 68% probability of occurrence

World Class

Decimal values (fractions) such as "4.7" can be used if required

FACTOR SCORING VALUE INTERPRETATION



High value at low cost is achievable only by highly creative measures taken by empowered and motivated people who are properly equipped, failing which costs will be high.

Can you see clearly how to achieve affordable high value?

Is your objective score realistic?

SCORE EVALUATION PERSPECTIVES OF STATUS



1. Make notes as necessary of what other people say
2. Draw conclusions
3. Document

WEIGHTED SCORE EVALUATION PERSPECTIVES OF STATUS



1. Make notes as necessary of what other people say
2. Draw conclusions
3. Document

PROCESS GUIDELINES



ITERATE IF PLANNED OR NECESSARY

(May be a separate workshop with a smaller working team)

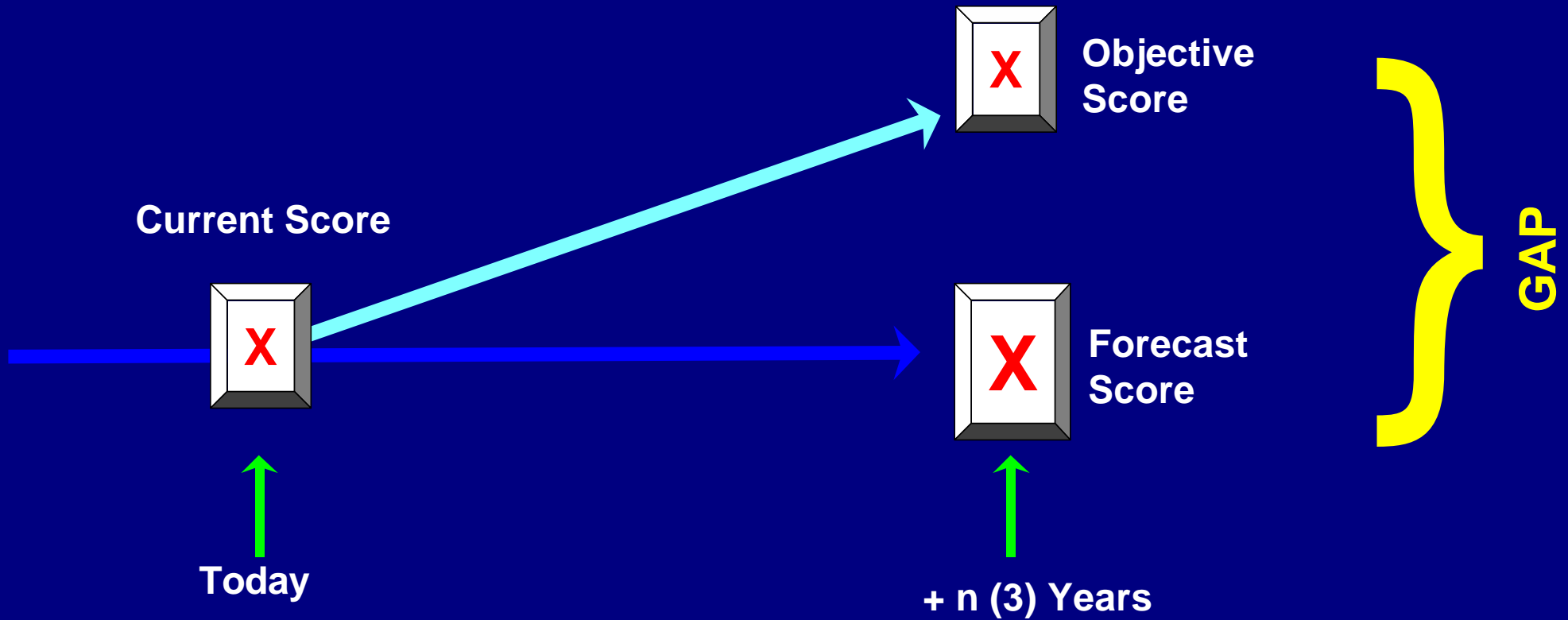
PROCESS GUIDELINES



ANALIZING THE OBJECTIVE GAP

(May be a separate workshop with a smaller working team)

RECAP : SCORING : THE OBJECTIVE GAP :

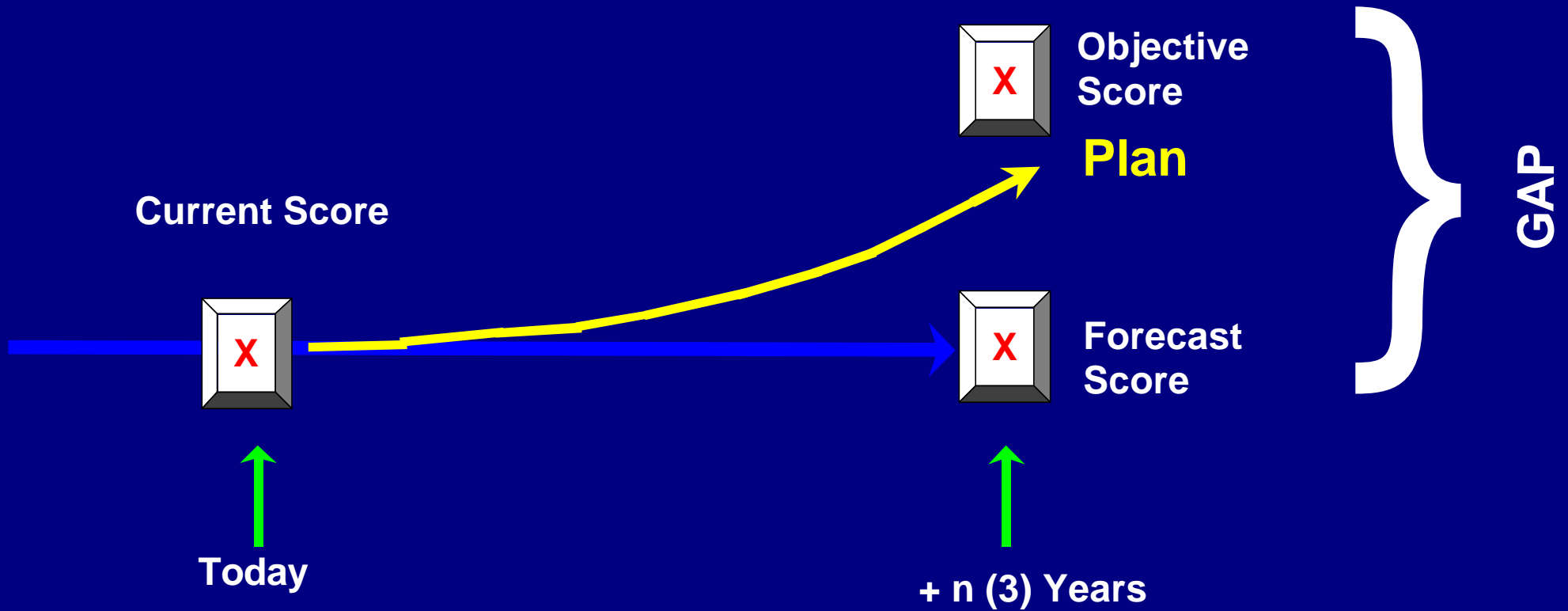


0 = Could not be worse
10 = Could not be better

Continued /...

PLAN

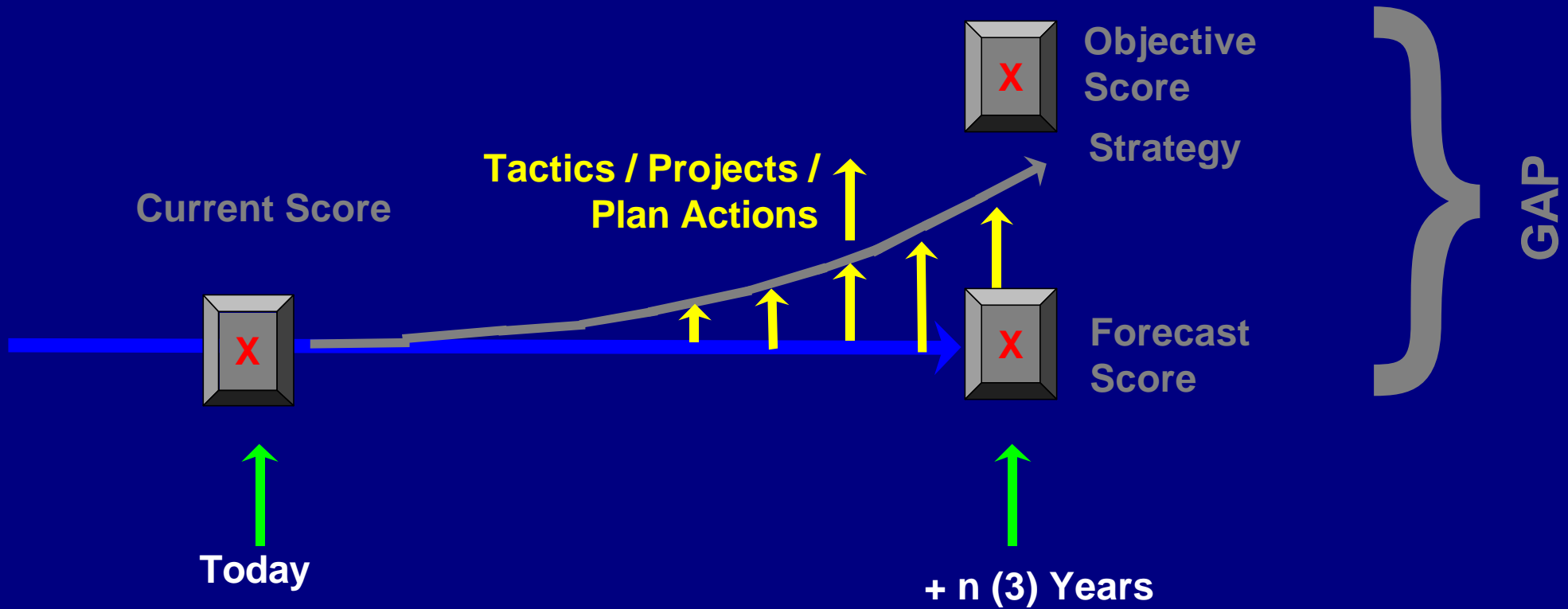
THE TRAJECTORY OF CHANGE TO CLOSE THE GAP



Continued /...

TACTICS / PROJECTS / PLAN ACTIONS

COMPONENTS OF THE PLAN TO CLOSE THE GAP



Continued /...

DEVELOPING THE PLAN = CLOSING THE GAP :



- 1. Specific projects and plan actions to close the gap**
- 2. Identify all possible projects**
- 3. Evaluate broad resource requirements**
- 4. Evaluate broad impacts**
- 5. Prioritize**
- 6. Iterative if planned or required**

**Undertake Gap Analysis Now OR
Schedule For A Later Date**

FURTHER STEPS



1. Analyse all components of the strategic context (strategic map)
2. Develop a governance model for implementation of the plan
3. Develop a detailed action plan
4. Develop implementation categories and remap the plan
5. Develop detailed project plans
6. Implement
7. Manage progress and success against defined **BUSINESS OUTCOMES**

Part of Long Term Execution of the
Plan

ACKNOWLEDGEMENT AND DEDICATION



I would like to acknowledge the contributions and inputs of all my clients, associates, staff and families without whom the work on which this presentation is based would not have been possible

Particularly my father and mother, Angus and Thelma, whose love and support for all my endeavours made it possible for me to gain this knowledge.

I also acknowledge Fiona and Ingrid for all they contributed and Sandra and Helene for their unreserved love and giving

This presentation is dedicated to the glory of the Eternal Creator who is the source and reason for our existence

Psalm 136:5 "To Him who by wisdom made the heavens, for His mercy endures forever;"

STRATSNAP PROCESS GUIDELINES



QUESTIONS?

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