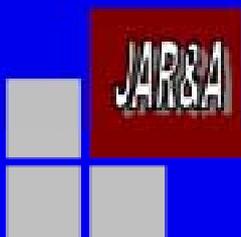
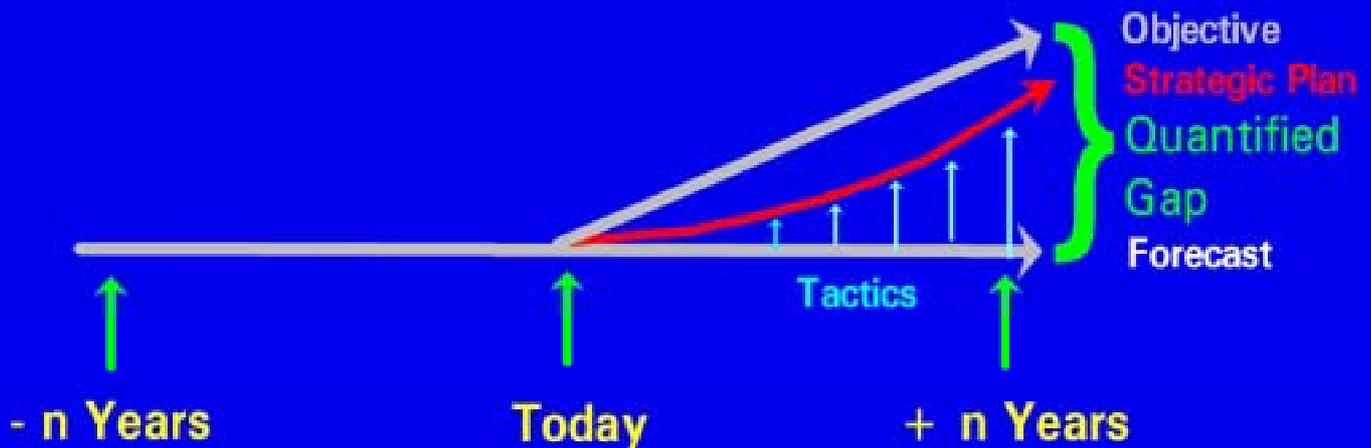


STRATSNAP[©]

Critical Issues Business Analysis Software



James A Robertson and Associates
Release 5.0

STRATSNAP[®]
Critical Issues
Business Analysis Software

STRATSNAP[®]
Critical Issues
Business Analysis Software

James A. Robertson
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James A Robertson and Associates

November 2004

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DEDICATION AND ACKNOWLEDGEMENTS

I would like to acknowledge the contributions and inputs of all our clients, associates, staff and families without whom the work on which these ideas are based would not have been possible.

I would particularly like to acknowledge Professor Malcolm McDonald whose Exmar Process stimulated the thinking that gave rise to this process.

Also my father and mother, Angus and Thelma, whose love and support for all my endeavours made it possible for me to gain this knowledge. Also Sandra for her 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;"*

ABOUT THE COVER

The upper graphic on the front cover is based on the strategy - tactics matrix of Professor Malcolm McDonald of Cranfield School of Management who can be contacted at m.mcdonald@Cranfield.ac.uk

This matrix uses McDonald's definition of strategy as "doing the right things" and tactics as "doing things right".

Consideration of these definitions indicates that an organization that does the right things well will thrive. An organization that does the right things but does not do them well will survive.

An organization that does the wrong things will die, it is simply a matter of how quickly. If it does the wrong things well it will die quickly and if it does the wrong things badly it will die slowly.

Used with permission.

The second diagram, also based on the work of McDonald, depicts the time dimension of strategic change and indicates that a strategic plan is the trajectory of change mapped out in order to move an organization from the state where it is forecast to be to the state that it sets as its objective.

This manual describes the software tool and associated method which is applied to develop numerical measures of critical issues which can then be used to formulate the strategic plan.

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PREFACE

This software and facilitation method have evolved since 1991 as a progressive endeavour to develop a simple and effective business analysis technique both for strategic analysis and design and systems analysis and design.

The basic method is derived from the Exmar Strategic Marketing Planning method of Professor Malcolm McDonald and has been greatly extended and refined over time.

I am indebted to Iain Peters who first introduced me to McDonald's work and trained me in the use of the Exmar process.

Various generations of this approach have been used in hundreds of workshops with a diverse range of delegate groups ranging from the leadership of an informal settlement to the executives of large corporations. It has been applied in diverse private sector corporations, government and various not for profit organisations.

The method has proved highly effective in all these settings and has been refined on an ongoing basis throughout this time. The method and tool have also been used in designing courses, analyzing knowledge and experience, developing components for presentations and for a book and for a comprehensive strategic analysis of the critical success factors for marriage and life.

This manual sets out both the functionality of the software and the basics of the facilitation method.

It is hoped that you will find the software and method valuable in whatever application you apply it.

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STRATSNAP[®]
Critical Issues
Business Analysis Software

INTRODUCTION AND CONCEPTS

One of the greatest challenges faced in determining business strategy, making business decisions, designing information systems and even in analyzing collections of information or knowledge and experience lies in determining what is really important.

It is very easy to make long lists of things to do, functions to provide, projects to undertake, etc. In most cases these lists contain many items that are not that important. Execution of all items on a list will also generally take much longer and cost much more than the organisation can afford or justify. Even if the organization can afford the time and expense the net benefits will not be justify the investment.

A concise analysis of "critical issues" is therefore highly desirable.

In addition, much strategic analysis and business analysis is undertaken on a "verbose" basis with long statements of requirement, functionality, etc. McDonald and others report that ninety percent of such plans fail.

Frequently organisations find that these loosely specified requirements are difficult to turn into measurable action and also find that different people in the organisation are executing the work with different priorities. A clear, concise statement of requirements and priorities is vital to cost effective, goal directed action which produces tangible results.

The STRATSNAP[®] strategic SnapShot[®] method and tool have been developed in response to this need.

STRATSNAP[®] provides a tool which can be used with the associated structured thinking and facilitation method to quickly assist groups of people with diverse knowledge and experience of any business situation to identify the critical components of the situation, attach priorities to them and evaluate the historic, current, forecast and objective performance of the organisation on a numeric basis.

2 STRATSNAP® Critical Issues Business Analysis Software

The SnapShot® tool used with the correct focus question and appropriate facilitation provides a technical environment to facilitate the identification of CRITICAL ISSUES relating to any aspect of the business or any aspect of a project, programme or activity.

The SnapShot® process involves:

- Defining a focus question
- Brainstorming all answers and issues relating to the focus question
- Defining the Critical Factors on an individual basis
- Synthesizing the Critical Factors on a group basis
- Reviewing the Critical Factors
- Determining the relative importance of the factors on an individual basis and then examining different perspectives
- Scoring the factors and examining the overall score result
- Examining the weighted scores and drawing conclusions

The results of the SnapShot® can then be transferred to a separate module which is used to evaluate resource requirements, value contribution and other measures.

The results of the SnapShot® can also be transferred to a gap analysis module which can be used to evaluate the projects required to close a particular gap and evaluate resource requirements in more detail.

The SnapShot® tool is designed to support synthesis of up to seven Critical Factors. The basis of this limit is as follows:

- Because the SnapShot® limits users to seven factors it encourages a Pareto (80:20) type of approach to the subject.
- We have found that seven factors works well as it represents slightly more than 80:20 (actually 86:14) and provides some space for expansion beyond a strict Pareto limit of five points.
- Seven is also viewed as an optimum from the perspective of presentation theory and management theory.

Correctly applied the SnapShot® process will assist users to focus on the:

Critical = The Right = The Strategic Issues

and create a structure to analyze the bulk of operational and tactical issues

The StratSnap® Process can be applied to a diversity of general focus questions in order to develop a comprehensive inward and outward looking critical issues understanding of the organization and its environment including market factors.

This is the essence of developing the overall design of a strategic or operational programme.

Other applications of the SnapShot® process include:

- Identifying the critical management areas that should constitute an executive team AND the relative importance that should attach to those areas in decision making.
- Identifying the critical strategic and operational areas to balance in organizational management.
- Analyzing a collection of unstructured information in order to understand key underlying concepts and principles in order to create structure.
- Analyzing master data validation content in order to design structured, hierarchical codes that are meaningful from both an operational and strategic view point.
- etc

The SnapShot® process can also be applied to focus discussion at any stage of the design process for a system, strategic plan or any other aspect of operations, management or decision making.

This can be particularly helpful where requirement development or other working groups are deadlocking or where there is discussion that is not results orientated.

Frequently the StratSnap® process will eliminate discussion about a range of peripheral issues that are not central to a successful outcome.

This method is very useful with long lists of required functionality.

Multiple SnapShots® can be collated into an overall structured and prioritized design using the same basic approach.

1.1 OVERVIEW OF THE MANUAL

The STRATSNAP® critical issues SnapShot® method and tool comprises three principle components:

- The tool itself.
- The overall method or process of using the tool.

4 STRATSNAP® Critical Issues Business Analysis Software

- Facilitation technique of the individual facilitator.

This manual is directed at providing a structured overview of the first two points -- the tool and how to use it in a facilitation setting.

There are reference to facilitation techniques but training in facilitation skills is not the purpose of this manual.

The manual is structured in order to address the functionality of the tool and the method of application of the tool in parallel.

The overall structure of the manual is based on the different software components of the tool which comprises a number of Microsoft Excel spreadsheets.

Within each chapter there is a discussion of principles and method with regard to application of the tool.

Interspersed with sections on discussion of the method are sections relating to the tool itself and how to use it.

The sections relating to the overall method are all numbered and are in italics for example:

3.4.1 CRITICAL FACTOR DETERMINATION

The sections relating to the tool itself are NOT numbered and are in plain text, for example:

REGISTRATION LIST (Reg Lst)

The text at the left of the entry is a detailed description, the text in brackets is the name of the tab at the bottom of the sheet in the spreadsheet.

The tabs are listed in the manual in the sequence they occur in the spreadsheets from left to right.

1.2 OVERVIEW OF THE SOFTWARE

The software comprises four spreadsheets:

- Session Master -- set-up for a workshop comprising one or more SnapShots®.
- StratSnap® -- critical issues SnapShot® tool -- the core of the system.
- StratSnap® Resources -- an add-on for high level resource and other analyses in support of StratSnap®.
- StratGap® -- a tool for the analysis of the gaps produced in the StratSnap® analysis.

The full power of the tool rests in the method and application of the tool and it is therefore important to understand the thinking and facilitation principles which are set out in the manual.

1.2.1 APPROACH

The workflow through the tool is NOT automated. This is done deliberately in order to provide maximum flexibility for users to apply the method and tool at whatever level of detail is applicable in any situation.

The tool can be used to quickly facilitate the thinking of one person in structuring the main points of a presentation or document and then to break this down into more detail.

It can also be used to develop a comprehensive strategic analysis of a large corporation or to focus discussion in a management or project meeting.

The tool is designed to provide information building blocks which can be used by a creative analyst and facilitator to build models of whatever level of complexity are appropriate to a particular situation.

1.2.2 MENU AND PROCESS FLOW

Each spreadsheet has a "Menu" sheet as the second tab from left in the spreadsheet.

On the spreadsheet scroll bar (usually at bottom left of the window) click the left hand left arrow " $|<$ " in order to move to the left of the spreadsheet and then click on the "Menu" tab.

Alternatively, on most sheets there is a "Menu" button in the top left hand corner of the worksheet. Click on this to go to the menu.

In each case the menu contains a vertical sequence of buttons and text that will lead you through the process.

If you adopt this approach, work down the menu by clicking on the buttons that apply to your application of the tool and when you finish working on a particular sheet click on the "Menu" button to return to the menu and select the next step.

In our experience most users will NOT use every single step in the process depending on their application.

We find that in practice that once one has used the tool for a while it is easier to navigate by simply scrolling left or right across the tabs and selecting the sheet that you want to work on.

1.2.3 CHANGING THE SPREADSHEETS

If you are familiar with Excel you are at liberty to make changes to the spreadsheets in order to better suit them to your application.

Should you do this we recommend that you save the sheet with another file name.

We cannot be responsible if you make such changes.

1.2.4 LOADING THE SPREADSHEETS

Load the spreadsheets like any other spreadsheet.

Load Microsoft Excel and then load the spreadsheet or, in Windows Explorer, click on the spreadsheet and Excel will load.

Depending on your settings, Excel will probably give you a warning that there are macros in the spreadsheet and ask if it is safe to load.

You can run the spreadsheets without macro's however the menu and border facilities and other buttons will not work. For many users this may be acceptable.

We suggest that you activate macro's.

In some cases organizations block the operation of macro's as the default setting. In such cases you may need the assistance of your in-house software support staff to over-ride the defaults if you want to use macro's.

1.2.5 STANDARD SPREADSHEET FUNCTIONS

The objective of this manual is NOT to provide detailed explanation in the use of Microsoft Excel or Microsoft Windows and functions may vary depending on which version of Windows and which version of Excel you are using.

The tool has been developed in Microsoft Excel '97 and should run in any later version of Excel without difficulty.

The following are headlines of information that is considered particularly relevant to the use of this tool.

1.2.5.1 Installing the Software

The software comprises standard Microsoft Excel Spreadsheets.

No special installation procedure is required.

The spreadsheets can be read directly off the CD by using "File", "Open" on the main menu at the top of the Excel Window and then navigating to your CD ROM drive.

Once you have loaded the spreadsheet save it on your local hard drive in a convenient location using "File", "Save As".

Alternatively use Windows Explorer to copy the files off the CD into a directory of your choice.

Windows may copy protect these files in which case read them into Excel and save them with a different file name or in a different folder.

1.2.5.2 Windows and Excel Default Settings

This manual is based on the Windows and Microsoft Excel settings for our versions of Windows and Excel. If you have different versions of Excel or Windows or have changed settings it is possible that your versions may not be exactly the same as ours. Location and identity of tool bars and other items may also be different depending on how your version of Excel is configured.

In particular the menus and icons in Windows and Excel may not be identical to what is contained below.

Should this be the case please consult your Windows or Excel manuals to locate the instructions that apply in your case.

1.2.5.3 Activating Macros

When you load the spreadsheet's a window may pop-up stating that the spreadsheet contains macro's and asking if you want to activate macro's. Click on "Enable Macros" in order to activate the macro's contained in the spreadsheets.

If you click on "Disable Macros" the spreadsheets can still be used but certain facilities will not operate in accordance with this manual.

In other cases, if your version of Excel is set to block macro's you may receive a different message telling you that use of macro's is blocked.

In order to activate the use of macro's change the relevant setting for your version of Excel which may be under "Tools", "Macros".

1.2.5.4 Copy and Paste

It is assumed that users know how to copy and paste in Windows and to perform other basic functions.

To copy information from a range of cells, place the cursor on the one corner of the range, depress the left mouse button and, holding it down, drag it to the diagonally opposite corner of the range. With the cursor anywhere over the highlighted area click the right mouse button. A menu will pop-up, click on "Copy" with the left mouse button.

Move the cursor to the top left of the destination range, click the right mouse button and click on "Paste".

If the border is "on" ranges comprising just rows can be selected on the row border on the left and columns can be selected on the column border at the top.

If the border is "on" the entire sheet can be selected by clicking on the blank block at the top left of the spreadsheet where the row and column borders intersect.

1.2.5.5 Borders

On some sheets the borders are turned off in order to maximize display space.

Should you require the borders to be displayed, click on the "Border On" button on the left hand side of the sheet near the top.

Protection must be "off" in order to do this -- see below.

To turn the borders off, click on the "Border Off" button just below the "Border On" button.

It is necessary to turn borders on if you need to increase the height of a row.

Increase the height of a row by left clicking on the row boundary on the left hand border and then drag the row up or down to decrease or increase row height.

Alternatively left click on the row and select "Row Height" and type in the height that you require.

Dragging the row height is generally most convenient.

You can also double click on the bottom of the row on the row border.

The same approach can be used to change column width.

1.2.5.6 Protection

Most of the sheets in the spreadsheets are protected.

This means that the number of things you can do on the sheet are restricted to data entry in accordance with intended use.

For example, with protection on it is not possible to type except in certain areas of the sheet and it is not possible to change the formatting, the row height or anything like that.

If you need to make any such changes then click on the "Tools" menu at the top of the Excel Window and then click on "Protection".

If the sheet is protected and you want to unprotect the sheet then click on "Unprotect Sheet". You will then be able to make changes to the sheet.

If it is not protected and you want to protect it then click on "Protect Sheet".

Should you unprotect a sheet and make changes we cannot accept responsibility for the consequences of this action.

1.2.5.7 Validation

As a further form of protection against accidental changes or editing and to assist you to avoid entering invalid data in spreadsheets or overtyping formulae, most of the sheets have validation settings to limit where you can enter data and what you can enter.

Where such a validation limit is in place you will receive a warning from Excel that tells you what the limit is when you press enter on a field where validation limits apply.

Should you want to change the validation limits or remove them altogether, select the cell range you want to change and then left click on "Data" and then "Validation". Protection must be off in order to change validation settings, see above.

After clicking "Data", "Validation", select the "Settings" tab at the top of the Data Validation window and then select the type of validation you require on the "Allow" drop down list. If you want to turn validation off completely then select "Any Value" from the drop down list.

Should you alter the validation settings we cannot accept responsibility for the consequences of this action.

1.2.5.8 Printing

There are certain sheets that are designed as printable forms. On these sheets click the "Print" button at the top of the sheet.

However, print formatting varies from printer to printer so sheets may not print as you would like on your printer.

Accordingly, we recommend that when you want to print a sheet for the first time with a new printer that you select "File", "Print" from the menu at the top of the Excel Window.

Make whatever adjustments you require to the print settings.

It may be necessary to select your printer from the "Printer", "Name" drop down list on the "Print" pop-up window. It may also be necessary to click on the "Properties" button on the "Print" pop-up window in order to change print settings.

Setting changes will vary depending on your printer.

Settings you may find it useful to change include print quality, try "Draft" or "Fast" if you have a slow ink-jet printer. Also check duplexing and other settings as appropriate to your printer and your requirements.

Use "Print Preview" to check that the report will print to your satisfaction and change the print "Setup" on the print preview screen or select "Page Setup" on the "File" menu if appropriate, for example if the report is overflowing page width or length or if you want to make other changes.

In general you should not have to make any changes apart from "Fit to 1 Page Wide" if your printer has distinctly different characteristics to the printers with which the spreadsheets have been tested.

1.2.5.9 Display

Excel will allow you to set the size of the display and you can also set the Window to full screen. You can also maximize Excel or set it to be a partial window using standard Windows functions.

We recommend that you "Maximize" Excel and "Maximize" the spreadsheet. Click on the "Maximize" icon second from left at the top right of the sheet or window.

If you want to see more of the sheet you can select "View" and "Full Screen" on the menu at the top of the screen.

You can also select "View", "Zoom" in order to change the amount of information displayed on screen. Depending on your Excel settings there may also be a zoom percentage drop down list towards the top right of your screen or elsewhere on one of the Excel toolbars.

1.2.5.10 Saving the Spreadsheets

We recommend that you save your spreadsheets every few minutes in case you make a mistake or in case there are problems with your computer, Windows or the power.

It can be very inconvenient to lose a spreadsheet when a team of people have worked for a significant time developing the content.

We recommend that you set "AutoSave" "On" with a save interval of not more than ten minutes.

To set "AutoSave" "on" you may need to click on "Tools", "Add-Ins" and check "AutoSave" on. Then click on "Tools", "AutoSave" and set the time interval to save.

In addition to this we suggest that you manually save the spreadsheet whenever you have completed an important piece of work and change the version number at the same time.

1.2.5.11 Spreadsheet Naming

When you start a new analysis, we suggest that you load a copy of the original spreadsheet from the CD or from a folder on your local hard drive where you have saved it and then save a copy of the spreadsheet in a folder that is named according to the project or analysis that you are using it on.

We suggest that in saving the file for a particular workshop that you give the file a name that is meaningful to you.

We use the following conventions:

- Retain the basic file name as you find it on the CD such as "01a_StratSnap_v_8_03". This is NOT essential, we do this in order to keep track of the source file. You can save the file with any name that you choose,

however, for accuracy when posting (pasting) between sheets it is strongly recommended that you retain the basic sheet name in the file name.

- Give the file name a prefix number that uniquely identifies the analysis as part of a sequence, i.e. number the file 01_xxx where "xxx" is the name of the file on the CD, e.g. *"01a_StratSnap_v_8_03"*.

In this case the file name with prefix might be *"01_01a_StratSnap_v_8_03"* where the *"01_"* at the left has been added by you to indicate this is analysis 1 in a sequence.

- Give the file name an additional name at the end of the basic name in order to identify the analysis. You do NOT need to retain the basic name, we do this as an in-house protocol which ensures that we keep track of the analysis tool as well. An example would be:

"01_01a_StratSnap_v_8_03_Critical Concerns"

where *"_Critical Concerns"* has been added by the user to identify the specific analysis or focus question.

- Add a version number to the end of the file name, for example:

"01_01a_StratSnap_v_8_03_Critical Concerns v 01"

where *" v 01"* has been added by the user to identify that this is the first version of the file. Version 01 should be a "clean" version of the spreadsheet as copied from the CD.

We then manually increment the file version number whenever we manually save the file using "File", "Save As" after doing a small to moderate amount of work on the analysis. This ensures that if there is a problem at some stage, either through the user making changes they subsequently consider inappropriate or for any other reason, it is possible to return to a previous version of the data.

This is a discipline that we apply in-house in all our work whether spreadsheets, documents, presentations, etc and which we recommend to clients. It takes a small amount of effort and uses a small amount of disc space which requires cleaning up from time to time but it can save considerable inconvenience if a file is corrupted through user error or system problems.

1.3 OVERVIEW OF THE METHOD

Following is an overview of the STRATSNAP® critical issues business analysis method.

It must be stressed that the power of the tool lies in its use as a facilitation, presentation and data acquisition aid in support of the method.

The power of the method is as a thinking method supported by technology. The technology on its own will not accomplish anything, it is what YOU do with the technology that will determine the value that you gain from its application.

The method is therefore more important than the tool.

The method can be applied with a flip-chart or with a paper pad, the tool provides a computer based structure and repository for the information, computes the numbers, presents them graphically and moves the information forward from step to step.

Your confidence in the method and the application of the tool will determine how well the tool serves you.

We encourage you to practice with the tool on your own before you apply it in a workshop setting.

1.3.1 THE FOCUS QUESTION IS CRITICAL -- IF YOU ASK THE RIGHT QUESTIONS YOU ARE LIKELY TO GET THE RIGHT ANSWERS

The formulation of the focus question for any analysis is absolutely vital.

If you ask the WRONG question you WILL get the WRONG answers.

By this is meant that asking a question that is not central to the problem you are trying to solve will result in you gathering information that is not central to solving that problem.

Formulating the focus question is vital.

For this reason we generally commence any planning or analysis session by using the focus question "*Critical Concerns*" applied to the specific subject that is being analyzed. This frequently assists to more clearly define the overall objectives.

You can also start off with a focus question such as "*The critical questions to ask about ...*" or "What don't we know about ..." applied to the subject.

The subject can include the strategic direction of the organisation, the value proposition for a proposed investment, the requirements for a particular system, the outline of a presentation or course or book, etcetera.

1.3.2 OVERALL USE OF THE TOOL-SET

The overall use of the tool-set comprises:

- a. Set up the Session Master for an analysis "session" with a particular objective, working with a specific group of delegates to analyze one or more SnapShots® in one or more working sessions.
- b. Undertake as many SnapShots® as are required in terms of the design of the analysis work.

This can range from one SnapShot® to any number, as required.

- c. IF required undertake a resource analysis. In many cases we find that the resource analysis is NOT required.
- d. IF required undertake a gap analysis.

The gap analysis is applicable if you are designing a strategic or project programme.

The gap analysis is NOT applicable if you are analyzing general information, focusing decision making, defining requirements, outlining a book or presentation, etcetera.

If you DO undertake a gap analysis it may be undertaken at a later date to the SnapShot® on which it is based and may be undertaken with a smaller working team.

1.3.3 OVERVIEW OF THE SNAPSHOT® PROCESS

The following is an outline of the SnapShot® process. You can use as few or as many of these steps as are appropriate to your particular situation:

- a. Brainstorm all points relating to the focus question.
- b. Based on the results of the brainstorming each person determines their personal view of the seven Critical Factors.
- c. Collectively synthesize the seven Critical Factors.
- d. Where applicable individually rank and weight the Critical Factors in terms of each person's personal view of relative importance based on their knowledge and experience of the business and its context.
- e. As time permits discuss the different "*views of the mountain*" = different perceptions of the situation / requirement / etc.
- f. Where applicable individually score the seven Critical Factors over the planning interval of choice in terms of historic, current, forecast and objective.

The tool is set up to use the same planning period for the historic, the forecast and objective periods. Specify the planning period in the Session Master.

If in doubt use a planning period of three years.

The scoring points are:

- i. Historic - How well were we doing "n" years ago? (where "n" is the planning period).
- ii. Current - How well are we doing today?

- iii. Forecast - How well will we be doing at the end of the planning period if we keep doing things the way we are doing them at present or if changes that are already in progress are completed successfully.

In other terms, how well will we be doing if this initiative does not take place or does not lead to action that brings about material change.

- iv. Objective - How well would we like to be doing at the end of the planning period.
- g. As time permits discuss the scores and the overall score trend.
- h. Discuss the gap between forecast and objective and use the weighted gap to identify which gaps warrant priority attention. The larger the weighted gap the more important it is to take action in that area.

1.3.4 GAP ANALYSIS

Where applicable undertake a gap analysis to determine the actions required to close the gap.

This may take place immediately after the SnapShot® or be part of a separate workshop undertaken at a later date with a smaller working group.

1.3.5 DELEGATE WORKING FILES

When undertaking a formal analysis we prepare working files for each delegate and print the worksheets from each step in the process during the workshop and give them to delegates.

If this is to be done you require either a fast printer or convenient access to a photocopier.

We have found that colour printouts are preferred and use a 16 page per minute colour laser printer in production workshops.

Small inkjet printers which print about three to four pages per minute graphics in colour are acceptable with a few delegates but take time to print.

Either way it is desirable to have a process administrator who collates, punches and distributes the printouts as they are generated. It is distracting for the facilitator to have to do this.

Working files should have dividers numbered 1 to 10 or 1 to 20 and work sessions should be numbered accordingly so that working papers can be immediately filed as they are handed out.

SESSION MASTER

The Session Master is a work area to set up basic information for an analysis session.

If you are doing a one-off analysis it is not necessary to use the Session Master you can enter information directly into the STRATSNAP® spreadsheet.

If you will be doing several SnapShots® then it is advisable to set up the basic data in the Session Master.

2.1 SET-UP

In preparing for an analysis session, identify the purpose of the session and who the delegates should be.

Depending on your objectives you may choose to use the tool and method working on your own or you may use them in a workshop with a group of people who have specific knowledge, experience and interest in the objective of the session.

In order to obtain quality representative results it is important to have delegates who represent all the different knowledge and experience profiles of the subject being analyzed.

You can also use the tool in an unplanned way to analyze a specific situation that develops in a meeting or in your day to day work or you can use it as a resource in a formally planned analysis process.

However you use the tool it is really important that you have a clear objective in mind for its application, even if the objective is to understand a particular situation.

Once you have a clear objective you can identify who you need to participate in a particular workshop in order to ensure that you have a group of delegates who represent the full spectrum of opinions on the particular subject.

If you are responding to a specific situation in a meeting and using the tool "on the fly" your approach will be more spontaneous. In spontaneous use it is still worthwhile taking a moment to consider your objective and whether there is a key opinion or knowledge and experience set missing from the meeting.

Remember -- to obtain the "right answer" you need to ask the "right question" AND you need to ask the "right people" -- people with appropriate knowledge and experience.

Using the tool and method with an unclear or inappropriate focus question or with an unrepresentative delegate group will produce a result that will reflect this NOT the quality result that will enable you to make a difference.

We strongly recommend that you give careful consideration to the focus questions and the composition of the delegate group.

2.1.1 SESSION MASTER

The Session Master contains space for entry of basic session details and delegate details.

If you are only doing a STRATSNAP® you can enter this information in the STRATSNAP® tool directly.

If you are planning to do more than one STRATSNAP® or also to do STRATSNAP® Resources or STRATGAP® then enter the information in the Session Master.

The name of the Session Master on your CD is:

00_Session Master_v_x_xx

where "x_xx" is the version number, which may change. The version number at time of writing this manual was "7_21".

2.1.2 SESSION DETAILS

The session details are as set out on the sheet and are discussed in more detail on page 17.

Enter as much or as little information as is appropriate to your session.

2.1.3 POST OUT DATA

The post out data sheets are source locations to copy the information entered into the Session Master across to the other worksheets for your session.

As a general principle, remember to SAVE REGULARLY.

In order to copy the information from the post out sheets left click on the blank border button at the top left hand corner of the intersection between row and column borders and right click "Copy".

On the destination sheet with the corresponding "Post In" name on the other worksheets left click on the top left hand corner and right click "Paste Special", "Values", "OK".

If you choose to do a straight "Paste" Excel will link the working spreadsheet to the Session Master -- this is not desirable since the delegate list may change from workshop to workshop and you may revise the delegate list in the Session Master to reflect this. Use the Session Master to set up the current delegate list and then "Paste Values" into the individual worksheets as the project progresses.

If the delegate list for subsequent sessions is different then you may update the delegate list in the Session Master and only paste into new worksheets.

Do NOT paste onto the "Paste Out" sheets -- if you do the formulae on those sheets will be deleted.

It is important to work with an original copy of the spreadsheets whenever you commence a new analysis.

THE SESSION MASTER SPREADSHEET

The Session Master spreadsheet contains a few sheets relating to setting up a session, as outlined above.

These sheets are:

TITLE SHEET (1)

The title of the spreadsheet, contact details and copyright notice.

This software is sold for use by a single user on a concurrent basis.

Should your organization want to use multiple copies concurrently you are requested to purchase additional copies.

There are no checks or protection on this, we leave this to your personal integrity.

MENU (Menu)

Takes you through the sequence of setting up the session as an alternative to following the tabs at the bottom of the screen from left to right.

If you use the menu then use the "Menu" buttons at the top left of the individual sheets to return to the menu.

There are NO menu buttons on the "Post Out" sheets. This is done in order to prevent links being established between sheets which will give rise to problems in time.

SESSION DETAILS (Sess Det)

Space to enter details of the session.

Client: If you are using the software in-house the "Client" will be the name of your company.

Project: "Project" will be the name of whatever project you are undertaking -- this can be a formal corporate project or simply the name of the analysis you are undertaking.

Such as *"Critical components of presentation for ..."*.

Time Frame: is the planning period for the analysis you are undertaking. This can be days, weeks, months, quarters, years or other period you choose.

If you are undertaking a strategic analysis it is widely accepted that this period should be at least three years and possibly five years.

I generally use three years unless the nature of the analysis or the organization indicates a longer period.

If you are undertaking a long term "horizon" scanning type of analysis then you might use a twenty year or fifty year time frame.

If you are seeking to determine a long term strategic plan to accomplish substantial growth and market share on a global basis the time frame will be longer than if you are simply looking at the next three years with modest growth consistent with performance to date.

The time frame number will appear on certain worksheets for reference.

Units: The units of the "Time Frame" are whatever units you choose to assign.

These could be hours, days, weeks, months, years or decades, as appropriate to the analysis as discussed above.

For most analyses we use years.

It is only necessary to enter "Time Frame" and "Units" if you will be taking the analysis as far as analyzing historic, forecast and objective scores.

If you are using the tool to analyze the structure of a presentation, book or other basic analysis or simply seeking to clarify your thinking on a particular subject, time frame and units may not apply.

Currency: The currency is the currency symbol such as "\$", "US\$", "AUS\$", "R", "GBP" or whatever currency you will use for cost and other estimates in the later worksheets.

If you are not going to undertake any form of financial analysis it is not necessary to enter anything in this field.

Currency Name: The currency name is the full name of the currency specified above.

Date: The date is the date of the first workshop. Enter this as a text item by typing a single quote "" before the date.

If you enter the date as "date" type data it may not display correctly in other spreadsheets depending on your version of Excel.

Venue: The location where the analysis is taking place. This could be "The offices of ...".

This information is not essential, it is a matter of record keeping.

Workshop Objective: This is also an optional field. However, it is useful to take a few minutes to consider why you are undertaking the analysis and formulate a concise statement of that objective.

This will assist you in later stages to be clear on why you are undertaking the exercise and will assist you in defining the focus questions and analyses that are most appropriate to your work.

The "Workshop Objective" could range from:

"Understand what is really important regarding ..."

to

"Develop a comprehensive strategic understanding of our business and develop a ten year strategic plan to become a global dominant player in the markets of our choice"

and anything in between.

The objective could also include:

"Determine the critical functional requirements for the ... information system"

or anything else that you are seeking to focus on and analyze in terms of establishing critical components, objectives, questions, success factors, headings, concepts or anything else that you might consider it relevant to use this tool and method to analyze.

Strategic Intent, Vision and Mission: These may be relevant to your analysis. I frequently leave them blank unless undertaking a specific strategic analysis.

In many cases you may find it appropriate to rather use the StratSnap® process to develop the "critical components" of your strategic intent, vision or mission.

REGISTRATION LIST (Reg Lst)

This is a printable form to be used when you are running a workshop where you were unable to prepare beforehand or did not know exactly who would be attending.

This list can be circulated to delegates to fill in their details.

It can also be used if you do not have contact details like phone numbers, etcetera or if you do not know departments, position, etcetera.

Most of this information is for record keeping purposes.

The initials are important if you are running any analysis with a number of delegates.

The initials appear on various sheets, reports and graphs and are the only way of linking data back to individuals.

The initials are also used on the input forms in order to ensure that data is captured for each delegate.

If your organisation prefers not to identify delegates on printouts you can allocate each delegate a unique sequence number instead.

If you know the delegates and their details it is not necessary to use this form.

In Order To Print: Click "File", "Print", "OK". If necessary select a different printer, select the number of copies, change the printer properties settings, preview or make any other adjustments before printing.

These are all standard Windows and Excel functions and are not described in this manual.

If the printout does not fit on a single page then click "File", "Page Setup" and check "Fit to 1 page wide", "OK".

DELEGATE LIST (Del Lst)

The delegate list is the capture form for the information collected on the "Registration List" printout. Refer notes above.

Enter the delegate names in a sequence that you consider appropriate.

In some organizations rank is important, in which case enter delegate names with the most senior personnel at the top and the most junior at the bottom.

Enter names within a rank either randomly or alphabetically or in some other sequence that you consider appropriate.

It is not essential to have any particular order, however, it assists with data capture later if the names are in some sequence that is easy for the person doing the data capture to understand and therefore locate names.

This is more important if there are a larger number of delegates.

Note that the software is only designed for thirty delegates. We have found that the process becomes very time consuming when there are thirty delegates.

We consider five to fifteen delegates to be the optimum.

It is possible to do an effective analysis of a corporate situation with as few as five delegates provided the delegates represent the full spectrum of major view points.

In practice we have found that it is preferable to have a maximum of three and preferably two levels of corporate hierarchy in the same workshop. People tend to be conscious of rank and more junior people find it difficult to express themselves in the presence of senior people, particularly if they have something controversial to say.

Senior executives may also not be frank about difficult issues if there are too many "ears" to hear what is said. Confidentiality is an issue in many cases.

In addition, if there are more than two or three levels of knowledge and experience present in the session those with different knowledge and experience sets do not necessarily know enough to communicate or understand what others at other levels understand. This can result in misunderstandings and lengthy discussion.

In such cases we prefer to run several workshops with delegate groups at different levels.

When working with diverse delegate groups representing different stakeholders one can experience similar difficulties. For example, it is preferable to run separate workshops with customer representatives and corporate staff.

In the context of fields such as social development and other fields in which "not for profit" organisations, including Government, operate it will often be preferable to run separate sessions with the different stakeholder groups.

Because the outputs are structured and numerically measured it is possible to obtain measures of lack of fit from the results of workshops run with different delegate groups who represent different ranks, interests, etc.

In such cases the objective of a workshop is to gather accurate and representative information from a particular delegate group which can then be compared with information from other groups.

In other cases you may want diversity in a single workshop in order to provide a context for different groups to hear divergent views in a relatively safe, structured environment. The "safety" of the environment is supported by the tool and method BUT is primarily a function of your facilitation skill and technique using the tool and method.

Sometimes it is preferable to have an external facilitator who is not caught up in the dynamics of the organisation.

Design of a workshop is something that should therefore receive careful thought. Plan who will attend on a conscious level with clear reasons for the composition of the delegate group.

The delegate list is only printed out if you require it and we generally do not distribute it. You might choose to print out a copy and place it in the front of your working file as a matter of record.

Where delegates represent distinct constituencies, such as people from different regions, it may be appropriate to group the names according to this parameter so that any regional differences in opinion, if any, can be more readily observed in the data.

No: Is the sequence number for each delegate.

Init: Is the initial of each delegate. Refer notes above with regard to sequencing.

Use a MAXIMUM of THREE letters in initials. Typically first name initial, middle initial and initial of surname.

If you have a delegate with a multi-part surname, such as "van der Merwe", abbreviate as seems most appropriate depending on the cultural setting.

If there are two delegates with the same initials it is necessary to identify them separately. Do this either by using the second letter or another letter of the first name or surname instead of the middle initial, e.g. "JsR" and "JtR" for James A Robertson and Janet A Robinson or else allocate sequence numbers such as "JR1" and "JR2" for the example above.

We find that alphabetically based mnemonic forms are easier for people to remember.

Name: The name is the name of record, e.g. "John Smith" or "Smith, John" whichever form you choose.

The name is a matter of record for future analysis, it is not printed or displayed anywhere else in the software.

Department and Position: This is text information for record keeping purposes and is optional.

Dep: Department code or any other classification code that you want to assign to delegates.

This code can be assigned after the workshop if required.

It is not used anywhere else in the software, however, it is possible to sort the information in the weight and score spreadsheets or to make multiple copies of those sheets and delete the data for all people except one group in each sheet in order to analyze data according to different classifications.

Sometimes this will highlight specific characteristics and differences of view point which can be important. Highlighting these issues can help to improve communication.

Such analysis is NOT included in the tool, this is a matter of manual analysis of the data captured in the tool by an experienced user of Microsoft Excel.

Initial Score: Can be used at the start of a workshop that is focusing on a specific subject to get an initial rating of how well delegates think the organization is doing at that point.

The number that is entered in this location is a function of what question the facilitator asks the delegates.

This is an alternative to the process of writing up initial assessments on a flip chart at the start of a workshop which is favoured by some organizations.

We have found that where such consultation is appropriate at the start of a workshop it is generally preferable to write it up on a flip chart.

This is a matter of personal preference in terms of workshop design. We prefer NOT to do an initial rating.

Workshop Objective Statement: This is a short statement by each delegate of what their expectations are for the workshop.

This is not always applicable.

As with the Initial Score we have found that it works better in most cases to write this up on a flip chart so that it is always in view and so that delegates do not have the impression that they are being placed on a formal computerised record in a way that could count against them when they do not really know what is going to happen in the workshop.

This may be particularly important if it is the first time delegates have been exposed to the method and tool and more so when there are rank, culture, relationship or other "political" issues in the situation.

Workshop design is up to each facilitator.

POST OUT WORKSHOP DETAILS (Post Out Wksh Det)

The post out workshop details sheet is the source for posting information into the "Post In Wksh Det" sheets in other spreadsheets.

Refer previous notes on how to do this.

In summary, copy the contents of the entire sheet to the "Post In" sheet in the target spreadsheet and "Paste VALUES" only.

POST OUT DELEGATE LIST (Post Out Del Lst)

The post out sheet for the delegate information. Comments as for the workshop details above.

END PROCESS (End Proc)

A marker sheet to advise that you have reached the end of the "Session Master" setup process and the end of the "Session Master" spreadsheet.

STRATSNAP[®] CRITICAL ISSUES ANALYSIS

The StratSnap[®] spreadsheet is the part of the tool-set that you are likely to use most frequently. It provides the work area for the great diversity of analysis.

3.1 SET-UP

The basic set-up is as set out above for the Session Master.

Load the master spreadsheet.

Save a copy with whatever file naming conventions are appropriate to you, see guidelines above.

Use the tool as appropriate to your need -- refer notes above in terms of the importance of setting a clear objective for your session, whether you are using the tool for a "quick and dirty" analysis of something you are busy with or whether you are using the tool for a comprehensive strategic analysis.

3.1.1 FOCUS QUESTION

The focus question is REALLY IMPORTANT.

If you ask the right question of an informed and representative delegate group and facilitate effectively you will get the right answer.

If you ask any question you will get any answer.

A significant part of the outcome you will produce in using this tool and method will flow from your analysis of the situation, your diagnosis of why you are undertaking the analysis and your definition of the focus questions.

There are examples of focus questions on the "Parameters" sheet which follows the "Session Details" sheet.

There are any number of focus questions you could ask.

Give the matter careful consideration and then undertake the analysis. I find that frequently the analysis of one focus question highlights other focus questions that it is appropriate to examine.

If you are unsure where to start I suggest that you start your analysis with "*Critical concerns about ...*" whatever the subject is that you are planning to analyze. Critical concerns often brings out things that are "top of mind", if you use the brainstorming component this will help to get issues out of delegates heads and onto paper so that they can focus more effort on getting to more deep seated issues subsequently.

You could even ask "*What questions do I need answers to?*" as your starting focus question.

It is helpful to have some experience with the tool and method before you undertake an analysis with a group of people. The point at which you do this is also a function of your experience as a facilitator and how willing you are to take risks in front of a group of people.

In some cases you might want to engage the services of a professional facilitator.

The development of an analysis is frequently a case of progressive elaboration. Determine a focus question, analyze it, gain understanding, determine another focus question, etcetera until you have a clear definition of the problem and solution space.

Find a balance between all the questions that you could ask and the questions that are critical. Use the tool if necessary to assist you to identify the "*Essential*" or "*Critical*" questions.

3.1.2 OTHER SET-UP

If you have used the Session Master spreadsheet, then post in the information from that spreadsheet.

If you want to set-up directly in StratSnap® then follow the same basic instructions for the Session Master. We recommend that as a general discipline you always work with the Session Master.

THE STRATSNAP® SPREADSHEET

The general operation of the StratSnap® spreadsheet flows from left to right, follow the tabs at the bottom of the spreadsheet or use the Menu buttons on the menu sheet.

TITLE SHEET (1)

As for the Session Master.

MENU (Menu)

As for the Session Master, follow the sequence of the buttons or use the tabs at the bottom of the individual sheets.

POST IN WORKSHOP DETAILS (Post In Wksh Det)

Post in workshop details from the corresponding "Post Out" tab in the Session Master spreadsheet.

See notes under "Session Master" on page 16 for copying information.

POST IN DELEGATE LIST (Post In Del Lst)

Post in workshop details from the corresponding "Post Out" tab in the Session Master spreadsheet.

See notes under "Session Master" on page 16 for copying information.

3.2 SESSION DETAILS AND FOCUS QUESTION

An important aspect of completing the information on the session details sheet is the thought process relating to clarification of what you are planning to analyze.

Certain information on the Session Details is brought forward from the Session Master.

Some of the information on the Session Details is not posted forward to the rest of the tool, it is requested in order to assist users to clarify their objectives and plan the analysis.

Other information is posted forward throughout the analysis.

As you gain experience with the method and tool you will be able to determine how much information to enter on the Session Details sheet.

To start with enter the information that readily comes to mind and do not get stuck trying to fill in everything.

THE TOOL

Following are details of the tool itself.

SESSION DETAILS (SESSION DETAILS)

The following items can be entered on the Session Details sheet.

Client:

Brought forward from the Session Master.

Project:

Brought forward from the Session Master.

Session:

Combination of the StratSnap® reference number and the StratSnap® name, automatically created.

StratSnap Reference No:

Whatever sequence number you choose to allocate.

If you are working with a group of delegates we recommend that each delegate is given a ring file to contain the worksheets as you print them out and that the ring file should contain numbered file dividers, one per focus question.

If you use this approach then the StratSnap® Reference number should correspond to the section in the file where the outputs are to be filed. This assists delegates to keep a full record of the workshop.

It is useful to have a two hole or four hole paper punch corresponding to the ring files and to punch the printouts before you hand them to delegates.

It is also useful to have a workshop Process Assistant, someone who will do much of the typing, printing, punching, collating and distribution of documents during the workshop so that you can concentrate on facilitating.

This will be particularly the case when you do not have much experience with the tool and method. However, even with an experienced facilitator we still recommend that you have someone to assist you with these tasks so that you can proceed at best possible speed.

We recommend that you prefix the spreadsheet file name on disc with the SAME reference number. If the section in the file is "12" then prefix the file name with "12_".

It is NOT necessary for the reference numbers to be sequential, allocate a reference number or letter or compound code that provides you with the most meaningful basis of cross referencing and back referencing.

Once you have chosen a reference number and started to make use of it, DO NOT CHANGE IT. Backward continuity in analysis is much more important than the aesthetics of the reference numbers. It is really important that once you have chosen a reference number that that number applies for the life of the plan, even if the plan continues for years.

Provided that you have the same number on the sheets and in the file name it will be easy to cross reference and back reference in the future and what is filed on disc will be easily correlated with the paper records.

StratSnap Name:

The name of the specific StratSnap® that is being executed in this copy of the spreadsheet. This should be a summary name that clearly identifies the specific analysis, such as *"Critical Concerns With Regard to ..."*.

This name is incorporated into the "*Session*" field at the top of the page and appears on most of the sheets and documents.

We recommend that this should be the same name that you append to the end of the filename when you save the file. We recommend that you follow this name with the version number in the form "v nnn" where "nnn" is a sequential number that you allocate whenever you save the spreadsheet or, at least, every time you have done a moderate amount of work. Refer previous notes on this subject on page 16.

Nominal Sequence Number:

The nominal sequence number relates to any specific sequencing convention that you may adopt in your organization.

The examples on the "Parameters" sheet, the next tab in the spreadsheet, contain suggested sequence numbers. These are by no means definitive, select the numbers that make sense to you in terms of the overall design of the analysis.

If in doubt number the first session 1 the second 2, etcetera. If you give a formal presentation at the start of a workshop you might want to place this behind divider "1" in the workshop file in which case commence session numbering from "02" in order to provide correspondence between the working file and the spreadsheets.

It is advisable to use the form "0n", that is to enter a leading zero if you expect the analysis to extend to more than nine worksheets, this ensures that the worksheets will sort sequentially on disc.

Worksheet Priority:

The worksheet priority is a priority description or number that you may choose to enter, or leave blank.

Use Worksheet:

This is a descriptive field that you can use to identify some specific derivative of the standard StratSnap® spreadsheet that you might choose to use here for example for "Products for Markets".

Focus Question:

This is the focus question that you select, as discussed above.

Various sample focus questions are contained on the "Parameters" sheet, the next tab to the right of the Session Details.

Supporting Information:

Reference to any other information of relevance that you may choose to include. This could include references to specific documents, notes of a discussion, etc.

Scoring Question:

The question that will be used to score how well the organisation is doing relative to the focus question.

The wording of this question is important. See the examples on the parameters sheet for suggestions.

Sub-Factor Determination Y/N:

Are you planning to determine sub-factors.

This is a question designed to aid planning. There is a sub-factor worksheet towards the end of the StratSnap® spreadsheet where you can analyze each of the seven factors determined in the initial analysis into seven sub-factors. This gives a total of forty nine factors in a structured, hierarchical manner.

These factors can be analyzed into further detail in sets of seven where appropriate.

In many cases it will be found that once one focuses on the "Critical" or "Essential" factors the result will be five or six very specific factors against which a relatively small amount of effort but a large amount of relative importance are assigned and one or two more general factors against which most of the effort but less of the relative importance are assigned.

In such cases the low importance but high effort volume or high content factors may be analyzed to two or more levels of depth while the low volume high impact factors may only be analyzed to one or two levels.

It is not necessary to analyze all the primary factors to the same level of depth.

It is not necessary to enter a response in this field, a decision can be taken at a later time, however, if you anticipate the need for sub-factor analysis make a note of this at this time and take account of this in allocating time for the session. It will typically take from one hour minimum to about four hours to undertake a sub-factor analysis with a focused team.

It can take longer if not firmly managed.

Special Follow-On Worksheet:

If you develop a special version of one of the companion spreadsheets or develop a completely new spreadsheet for your own purposes you can record your intention to use that tool at this point.

This is a planning point, the information is not used further in the software.

Resource Analysis Required Y/N:

Do you plan to analyze resources using the StratSnap® Resources spreadsheet.

A planning question.

Do Resource Analysis Y/N:

Are you planning to do a Resource Analysis in the current session?

This is a planning question. If you intend to do a resource analysis it is necessary to allow sufficient time in the workshop to do this. A resource analysis can take anything from about half an hour with a simple analysis and simple situation to several hours or longer for a more complex situation.

The resource analysis is only applicable if you are investigating something that is directed at specific actions which have time and cost associated with them.

If you are using STRATSNAP® to analyze a specific situation in order to gain deeper understanding then the resource analysis will not apply.

Factor Quantity:

The StratSnap® Resources resource analysis spreadsheet provides for analysis of a factor quantity that is not catered for in the standard software.

Should you plan to analyze such a factor name it here.

Only applies IF you are planning to do a resource analysis.

Quantity Unit:

The units for the factor quantity.

Only applies IF you are planning to do a resource analysis.

Value Add / Destroy Question:

If you are going to undertake a resource analysis including an analysis of value creation or value consumption, then enter the question to be applied in evaluating that value here.

Only applies IF you are planning to do a resource analysis.

% Value Add to Invest:

If you are undertaking an analysis directed at establishing the investment case for a proposed solution then enter the percentage of the estimated value that you are willing to invest in creating the solution.

Only applies IF you are planning to do a resource analysis and analyze something in addition to the standard resources.

This percentage may need to be determined in the workshop with the delegate group as a step towards the resource analysis.

Resource Question:

The question to be applied in evaluating resource requirements.

Only applies IF you are planning to do a resource analysis.

"Other Resource" ID:

Description for the "Other Resource" item in the resource analysis spreadsheet.

Only applies IF you are planning to do a resource analysis.

Time Frame:

Brought forward from the Session Master, refer notes for the Session Master on page 18.

Unit:

Unit of time frame, brought forward from the Session Master, refer notes for the Session Master.

Currency:

Brought forward from the Session Master, refer notes for the Session Master.

Currency Name:

Brought forward from the Session Master, refer notes for the Session Master.

Date:

Brought forward from the Session Master, refer notes for the Session Master.

If you enter the date on the Session Master as a date value it may not convert correctly in your version of Excel. In this case either enter the date as a text string in the Session Master or edit it here by unprotecting the sheet and removing validation as discussed on page 8.

Venue:

Brought forward from the Session Master, refer notes for the Session Master.

Workshop Objective:

Brought forward from the Session Master, refer notes for the Session Master.

Strategic Intent:

Brought forward from the Session Master, refer notes for the Session Master.

Vision:

Brought forward from the Session Master, refer notes for the Session Master.

Mission:

Brought forward from the Session Master, refer notes for the Session Master.

SAMPLE PARAMETERS (Parameters)

The sample parameters is a series of examples that you can apply for strategic and other analysis. See also the notes on page 25.

Scroll from left to right and back again to read what is there.

These examples may assist you to formulate your own focus questions, etcetera or you can copy a specific set-up to the Session Details sheet.

In order to do this:

- a. Select the example you want to use.
- b. Copy the portion of the example you want to use and paste it onto the corresponding portion of the Session Details sheet.
- c. Edit as you choose.

REGISTRATION LIST (Reg Lst)

The same as the Session Master, refer notes for the Session Master on page 20.

DELEGATE LIST (Del Lst)

The same as the Session Master, refer notes for the Session Master on page 20.

PROCESS GUIDELINES (Proc Gdln)

This is a summary of the standard facilitation process for ease of reference.

Detailed Process Guidelines are contained in the form of a presentation in the files:

"StratSnap Process Guidelines v xx Slides.pdf"

"StratSnap Process Guidelines v xx Handouts.pdf"

on the CD where "xx" was "27" at the time of writing this manual.

The "Slides" file is a presentation that can be projected on screen when first leading delegates through the process and is also contained as *"Handouts"* in a form that can be printed and included in delegate reference files.

We generally print out the handouts and give them to delegates at the start of a workshop so that they can refer to them throughout the workshop.

We also facilitate the first process step by step using the Process Guidelines.

These presentations are contained in the *"Process Guidelines"* folder on the software CD.

3.3 BRAINSTORMING

Detailed factor brainstorming is the first step of the facilitation process.

The objective of the brainstorming step is to get down all information relating to the subject under analysis.

Brainstorm ALL ideas, points, requirements, etcetera relating to the focus question.

There should NOT be any discussion.

There are no wrong answers, record all thoughts, no matter how outrageous they may seem.

Everything that might possibly have a bearing.

This step provides an opportunity for every delegate to express themselves on everything relating to the focus question and also to stimulate thinking relating to items that may not be immediately apparent or "top of mind".

This step also provides an opportunity for delegates to get "stuff" that is troubling them said and recorded. This applies particularly if one commences a workshop with "Critical Concerns". Critical concerns provides a vehicle for delegates to get anything and everything that is troubling them about a particular situation out on the table and aired. Doing this at the start of the process avoids this "stuff" constantly being raised during the rest of the workshop.

We recommend starting most workshops with "Critical Concerns".

Frequently an initial round of brainstorming will seem to come to an end but with further inquiry by the facilitator it will frequently happen that further ideas and issues start to come to the surface.

This is a process of discovery and it is important to give sufficient time for delegates to get to the less obvious and frequently more deeply seated issues which often turn out to be the critical issues.

Seeding of the process by the facilitator by asking appropriate questions or suggesting topics that delegates seem to be overlooking is an important part of the facilitator's role in facilitating delegates to dig deep in seeking ALL information of importance relative to the focus question.

It may sometimes also be necessary for the facilitator to inject reference to contentious issues that delegates are skirting around.

For example, in one case I was aware that there was suspicion that the Chief Executive, who was an expatriate, would leave if things got rough. None of the delegates who had raised this in private interviews raised it during the Critical Concerns process yet it was evident from the private interviews that there was a lot of resentment and suspicion around this issue.

When the brainstorming quietened down I injected this point into the brainstorming simply by making a brief remark and typing it in. It was as if a boil had been lanced and immediately there was a new flow of concerns that were triggered by the release of this contentious point.

Eventually this created the context for the subject of this suspicion of the Chief Executive to be openly discussed and resolved later in the three day session.

If this issue had not been aired there would have been a gap in the overall analysis which could have compromised the integrity and reliability of the outputs of the entire workshop.

The brainstorming process is a vital intellectual process to enable delegates to identify the full scope of the problem or requirement. By doing this the probability of unforeseen developments later on is considerably reduced.

THE TOOL

The following are the features of the tool relating to brainstorming:

DETAILED FACTOR BRAINSTORMING (DET FACT BS)

The brainstorming can be recorded on a flip chart or writing pad instead of on the computer.

We recommend that you work with a data projector and a fast typist to type in the brainstorming information as it is given by the delegates. By fast we mean someone who can touch type accurately at a speed of at least sixty words a minute or faster.

This provides a full record of all the information which can then be integrated into detailed analysis and design at a later date.

Unless you are a fast typist and an experienced facilitator we recommend that you have an assistant to do the typing so that you can focus on facilitating.

If you are not a fast typist and experienced at facilitation and do not have an assistant to do the typing it may be preferable to record the brainstorming on a flip chart or writing pad. Speed is of the essence in this step so that the ideas can flow.

Further discussion assumes that this information is entered at the keyboard while displayed on screen.

If you are doing an analysis on your own or with a small delegate group you may choose to skip the brainstorming, however, we strongly recommend that you only do this if you are certain that you will not miss a major point.

Factor: The factor column is provided for entry of the brainstorming comments.

There are 301 lines provided in the spreadsheet.

This should be sufficient for most purposes.

Should you find that the brainstorming process generates more than 301 line items then insert additional lines before "No" 301 and insert numbering accordingly.

REMEMBER TO SAVE REGULARLY -- it is a challenge to recover brainstorming information if it is lost.

Group: Once the information has been captured in the brainstorming step it is frequently useful to analyze all the points in terms of the Critical Factors that are developed in the synthesis.

The classification and sorting step can take place in the initial workshop or you can do it with the same group at a later date or with a smaller task team or even do it on your own if you are not too concerned about the result being a group result.

In order to classify and sort the data, enter the number of the Critical Factor that provides the heading that includes each brainstorming item in the "Group" column.

Once you have entered the Critical Factor number against each brainstorming item copy the data to the "Detailed Factor Sort" page.

Printing: The Detailed Factor brainstorming page is set up to print the entire sheet.

In most cases it is likely that you will enter less information than there are rows in the spreadsheet.

In such cases use the mouse to highlight the range containing the brainstorming information. It is easier to do this by clicking on the cell at the bottom right of the area you want to print, which should be in column "G". Drag the cursor up to cell "B2" and then select "File", "Print Area", "Set Print Area".

Use "File", "Print Preview" to check that the printout is as you want it and then print.

If you omit to reset the Print Area the entire brainstorming work area will print which consumes paper and time unnecessarily.

Row Height: Depending on your version of Microsoft Excel the row height in the brainstorming sheet may or may not increase as you type in more text.

If the row height does not increase then use the mouse to drag the bottom of the row down to display all the text or "Double Click" on the bottom border of the row to get Excel to automatically increase the row height.

In some versions of Excel where the printer formatting and screen formatting do not agree the last line or two of text in a cell may be concealed on screen. In this case drag the bottom border of the cell down in order to display the text on screen if required.

Amount of Text: Type every statement that every delegate makes into a separate cell.

It is important that as part of the thinking process every statement made by every delegate is recorded separately and accurately. Do NOT censor, edit or correct what people say, type it down exactly as they give it and do NOT discuss or omit anything.

The objective is to stimulate people's thoughts NOT to create some sort of presentation document. People will hold back if you start editing their thoughts or combining them.

Capture every statement, even if it is a near duplicate of a previous statement.

I also capture "jokes". Sometimes the only way that people can express something they are concerned about is to turn it into a "joke" or light hearted remark. Sometimes such "jokes" can trigger other thoughts that are valuable.

Depending on your version of Excel there may be a limit on the amount of text in one cell that will display and print correctly. This should not be a problem in brainstorming, delegates should NOT be dictating large passages of comment.

Provided you enter every comment in a separate cell this will not be an issue.

DETAILED FACTOR SORT (Det Fact Sort)

The detailed factor sort can take place once the workshop is complete unless you have particular reasons to do the sort with the original delegate group.

In order to sort select the full range of text in the Detailed Factor Brainstorming sheet. Select the bottom right hand corner of the text in column "F" and drag the cursor up to cell "D7", right click and "Copy".

Tab to the Detailed Factor Sort sheet, position the cursor on cell "D7" and right click and paste.

Select the bottom right hand corner of the text in column "F" and drag the cursor to cell "C7" (i.e. INCLUDING the right hand column of item "No").

Click "Data", "Sort", select "Column F", "OK".

Provided you have entered the Critical Factor number for each item in the "Group" column of the brainstorming sheet sort will list the brainstorming results according to Critical Factor. SAVE.

As a refinement you can insert rows between the brainstorming results for each Critical Factor and insert a heading based on the Critical Factor. This list can then serve as a reference during detailed solution design at a later stage to ensure that every point raised during the brainstorming is either taken into account or deliberately omitted.

3.4 SYNTHESIZE

The most important stage of the entire StratSnap® thinking process is the "Synthesis".

The Synthesis involves each delegate individually evaluating what they consider to be the critical components identified by the brainstorming and the group then collectively working to identify the seven Critical Factors.

This process provides a context for delegates to mobilise their entire knowledge and experience of the situation being analyzed in order to evaluate and understand what is most important.

It is important to recognize that this is a THINKING PROCESS, NOT something that the computer is doing. A successful outcome is a function of the method, the tool and the FACILITATION which is primarily influenced by your choice of focus question and overall design of the analysis you are undertaking AND your ability to facilitate the intellectual process of the group to consolidate their thinking in a structured manner which accurately summarizes the entire data set into concise statements.

This process can take place entirely manually on a flip chart or writing pad, the software simply provides work areas to do this in a structured manner which permits the information to be retained, printed, collated into a report, etcetera.

3.4.1 CRITICAL FACTOR DETERMINATION

What are Critical Factors?

A down to earth example -- in order to travel 1,000 kilometres by motor car from one city to another you need:

- a. **A motorcar** -- it does not matter whether you own it, rent it or use a taxi or obtain a motor car in some other way.
- b. **A driver** -- it does not matter whether they are licensed or experienced, they must be able to drive at a level that gives some hope of reaching your destination.
- c. **Fuel** and a way of obtaining additional fuel en-route.
- d. The motor car must be in **working order** -- the engine must work, it must have tyres, etcetera.
- e. **A map or directions** to get to your destination.

IF YOU DO NOT HAVE ALL THE ABOVE YOU WILL NOT ACHIEVE YOUR OBJECTIVE

It would be preferable to have:

- f. An experienced and highly competent driver and a roadworthy car -- this is NOT essential to achieving your objective.
- g. A nice comfortable car with air conditioning, the make and model of your choice, etcetera.

The first five of these points are critical, the other two are NOT.

In practice most people devote most of their attention with regard to discussions about travelling by motor car to the last point and perhaps the sixth point. They take the first five points for granted and ASSUME they will be present simply because they KNOW to take account of these issues and, in the above example, they are so obvious that few people overlook them.

However, in issues of business strategy, information system design, analysis of information on which to base critical decisions, etcetera, the distinction of what is critical and what is not critical is not as clear.

In addition, because the problem or solution or information is not as tangible and visible as a motor car, many people do NOT really understand the assumptions that they, or others, are making.

The Critical Issues method that this software supports is designed to systematically facilitate a group of people who are knowledgeable about the situation to individually and then collectively identify what really is critical.

The above example is included in the Process Guidelines and is very important in the facilitation process in order to ensure that delegates are focused on the issues that are critical.

3.4.2 WHY SEVEN FACTORS?

The tool is designed for a maximum of seven factors. In some cases there will be less.

In general we have found that if there are much less than seven factors there is likely to be something that is being overlooked or over simplified.

Seven is close to 80:20, the so-called "Pareto" ratio which states that most things in life work on the basis of twenty percent of the issues accounting for eighty percent of the impact. This is a well established statistical first approximation in many data areas.

Seven factors gives a ratio of 86:14 but we have found that in practice seven works better than five or six because it gives space for some flexibility and better accommodates different view points in the delegate group.

An important aspect of the synthesis process described below is to tell delegates that if there is a specific factor they really cannot agree on or that they think is critical and no one else agrees with, it is NOT necessary to reach agreement, the factor can be included and the weighting step will give every delegate an opportunity to place their distinct opinion on record.

This is an IMPORTANT component of avoiding time wasting discussion, debate and argument, appropriately facilitated it provides space for differences of opinion to be resolved with little or no conflict.

This is discussed again later in terms of the "*Views of the Mountain*".

Another basis for seven factors is derived from theory relating to effective presentation of information. It is widely held that for ease of understanding there should be between five and ten slices on a pie chart. This gives an average of 7.5.

Management theory indicates that the average person can manage seven plus or minus two abstract concepts simultaneously. This "cognitive span" is a major reason why many solution designs fail to deliver -- a large list of components in an unstructured form is very difficult for people to grasp and fully comprehend and, accordingly, gaps are easily overlooked.

By structuring the entire analysis based on seven or less factors each of which are analyzed into seven or less factors the overall design becomes much easier to grasp holistically and errors are therefore reduced.

By focusing on the "*Critical Factors*" and accepting that the vast majority (about eighty percent) of all the information will be grouped under one or two of those factors, the critical issues are highlighted and design can focus on those aspects that will deliver the greatest impact or benefit while keeping track of those aspects that, while important, are NOT critical. Refer the example of the journey by motor car above.

The average manager can effectively manage seven plus or minus two people reporting directly to them. This further supports the thinking for seven factors, particularly since when projects result from the analysis the management of the projects should flow from the critical issues.

Should you want to accommodate additional factors you could modify the spreadsheets accordingly, this will be quite time consuming and we recommend that you RESTRICT yourself to seven factors.

If you find yourself in a situation where delegates have a strong need to add an additional one or two factors we strongly support you to review the "*Critical Factors*" to see whether some of them are ambiguous or loosely defined or whether there is actually more than one dimension represented.

In many years of using this tool and method we have not found strong grounds to increase the number of factors above seven.

If necessary increase the scope of the seventh factor to accommodate the additional information and then undertake a sub-factor analysis of factor seven to break it down into more detail. Weight accordingly.

The weighting process provides another step for divergent views to be expressed and recorded and, should it happen that the weighting process indicates that a restructuring of the Critical Factors is required then that can be done.

Progressive elaboration and iterative refinement are a necessary part of the process of investigation and analysis that this tool and method are designed to support.

3.4.3 THE SYNTHESIS PROCESS

The Critical Factor determination or synthesis comprises the following:

- a. Each delegate INDIVIDUALLY and privately determines seven critical statements which summarise all the information recorded during the brainstorming. These should be the seven factors which most effectively summarize the critical issues addressed by the detailed list that has just been brainstormed in terms of the focus question.
- b. Each factor must be unique and exclusive, there should be NO overlap, each factor should be a meaningful and succinct statement.
- c. The factors can be a selection off the brainstorming list or they can be statements that do not appear anywhere on the brainstorming list -- at this point there is no right or wrong answer, the objective is to identify the conceptual points that collectively embrace the entire range of information relevant to the focus question.
- d. Choose one delegate to start with. Where there is a senior person, such as the Chief Executive Officer or the head of a department or similar, then we prefer to start with that person, it is a matter of choice for the facilitator who they start with. Sometimes we ask for a volunteer but we prefer to start with the person whose opinion carries the most weight where this is applicable. This affords the senior delegate the opportunity to express their position and affords other delegates the opportunity to better understand the priorities of the most senior person.
- d. List the seven factors of the chosen delegate against "1.1" to "1.7" by overtyping where it says *"First Delegate Dimension 1 Critical Factor 1"* through to where it says *"Other"*.

Do not discuss the factors at this time.

- e. Once the factors for the first delegate have been captured then ask the delegates if there is anyone who has a list that is totally different to what has been captured.

Explain that this is acceptable.

Sometimes there will be no one who has a drastically different view and sometimes there will be.

If there is such a person capture this information against 2.1 to 2.7 *"Second Delegate Dimension 1 Critical Factor 1"* through to 7.

In some cases analysis of a particular problem or solution space is multi-dimensional. It is quite frequent that analysis will identify this.

If this is the case the resulting analysis will be a two dimensional matrix, in some cases there can also be a time dimension or some other third dimension.

It is really important that these dimensions are identified and analyzed separately, failure to do this will result in various logical non-conformities that will result in considerable disagreement, debate, argument, time wastage, etcetera.

Once the initial stages of the synthesis are complete the data for the additional dimensions will be copied off onto other sheets in the spreadsheet as discussed below.

At this time simply record the possible second dimension as outlined above.

If there is someone who thinks they have a further drastically different dimension record this third. In my experience this has never happened although it is theoretically possible.

It is also possible that certain points will relate to a time sequence or staging of events, if someone has picked this up record it separately.

- f. If no one has a drastically different set of factors then ask the remaining delegates to volunteer all points they have that are not exactly covered by the first one or two delegates.

At this stage it is important NOT to get involved in trying to edit or refine what has already been captured. Simply enter the additional items against the remaining sections in the Synthesis sheet until all information from all delegates has been captured.

You can either capture all points for each delegate or only those points that delegates consider to be different. This is a matter of facilitation style and may also be influenced by the culture and politics of a particular delegate group.

As a general rule I only capture additional points and not points which are exact duplicates.

However, if someone wants to start adding to or editing an existing point I generally prefer to record their statement as a separate point and then undertake the editing or consolidation as a separate activity.

- g. Once all the Critical Factors identified by delegates have been listed in the Synthesis worksheet, start the synthesis and integration process.

If a delegate identified a list of items which are genuinely distinctly different and which intuitively point to a second dimension then maintain the second dimension against points 2.1 to 2.7.

If there is not clearly a second dimension then integrate the points starting at 2.1 onto 1.1 to 1.7.

Starting with 2.1 if there is NO second dimension and starting with 3.1 if there IS a second dimension consider each point in turn and synthesize as follows.

For ease of documentation the following explanation assumes there is one dimension, the same approach will be followed if there are two dimensions only the synthesis and integration will take place onto two target lists instead of one.

3.4.4 COMPOSITE VERSUS EXCLUSIVE STATEMENTS

In undertaking the synthesis and integration it is important to be clear whether the objective is to produce composite statements or exclusive statements.

In certain cases the definition of the Critical Factors may be narrow, in this case the objective is to identify the six factors which are critical and lump all remaining items under factor 7 with a primary definition of factor 7 being "other".

In most cases I find that composite statements are most appropriate. Different delegates will identify different facets of specific broad concepts or principles which will only become fully defined when all the different perspectives are synthesized into one composite statement.

To produce composite statements take every statement that seems to relate to another statement and add them together against 1.1 to 1.7.

To do this, place the cursor on the cell with the text item. Before doing this we recommend that you activate the "Formula Bar" in Excel if this is not already activated.

The Formula Bar contains the text editing window which appears at the top of the Excel screen above the spreadsheet by default. It may be located elsewhere in your version depending on your set-up. To activate the Formula Bar click on "View", "Formula Bar" and the formula bar will appear. If it was already present clicking "View", "Formula Bar" again will activate it.

In order to copy the text I prefer to place the cursor on the text in the Formula Bar cell contents edit window, highlight the text and then click on the scissors (cut) icon or right click and select cut.

Then move to the target cell against 1.1 to 1.7 where the item most logically fits, click on that cell and in the Formula Bar window paste the contents onto the end or in the beginning of the text that is already present.

This then builds a composite statement against 1.1 to 1.7 and clears out the remaining items from 2.1 onwards.

If there is a second dimension which you are synthesizing against 2.1 to 2.7 then the same process applies however the text may be appended to 2.1 to 2.7 as well as against 1.1 to 1.7.

If you are seeking to build exclusive statements then identify whether an item is a refinement of one of the first six statements otherwise append it to the seventh statement as an item under "other".

Note that in general I synthesize and integrate composite statements unless I have very specific reasons to select very narrowly defined points, as in defining the critical driver or drivers for corporate strategy. Mostly I build seven composite statements.

Continue this process until all points from 2.1 onwards, or from 3.1 onwards if there is a second dimension, have been synthesized and integrated or appended onto the first seven or first seven plus second seven points.

It is advisable to SAVE REGULARLY during this process. It is challenging to obtain support from delegates if the results of their intense mental activity during the synthesis and integration process is lost because of failure to save the material regularly.

3.4.5 SECOND DIMENSION

Where a second dimension has been identified, once the basic synthesis outlined above is complete and all remaining factors have been combined with the first seven plus seven then select the text against items 2.1 to 2.7 and copy and paste onto the "Crit Fact Dim 2" sheet which is located four tabs to the right of the Synthesis sheet.

Leave the Dimension 2 information on that sheet and schedule a separate period of time to return and analyze this information.

This analysis requires copying the information from the Dimension 2 storage area into a NEW spreadsheet on the Synthesis tab and then taking the second dimension through the same analysis process as is outlined below.

An example of two dimensions would be function and location. Function being what an organization does and location being where it does it. This frequently arises when the essence of critical concerns relate to governance.

Another example would be function and values. Function being what the organization does and values being the attitude or "how" the organization performs the functions.

The what, how and where are ALL real world dimensions, however, in my experience, only two of these factors will surface in a critical issues analysis. It is not beyond the bounds of possibility that all three dimensions could surface however I have never encountered this in any critical concerns process.

The third dimension can be identified and analyzed if there are indications that this is critical to the particular situation or solution being analyzed.

3.4.6 STAGES

Another dimension that may sometimes surface during brainstorming and synthesis is a time or stage dimension. This will take the form of a series of activities or actions which take place in a more or less sequential manner.

I have not seen these surface during a synthesis but they DO exist in practice and sometimes it may be desirable to identify that this is the case, i.e. that there are certain activities which require certain activities to be completed on a time basis before others can be commenced.

Should such issues arise during synthesis and integration these would be collected during the synthesis and integration stage and then moved to the "Stage" worksheet.

It is up to you as facilitator to notice when something that has a time dimension to it arises and to determine whether this warrants the definition of a time dimension in the analysis. ONLY introduce a time dimension in the analysis if it is very apparent that time is a major consideration in what is being synthesized. As mentioned I have never encountered a formal time dimension in a synthesis process although it is theoretically possible and the software therefore provides for this.

On the other hand I have undertaken distinct analysis to determine the stages as a separate component of a solution design or analysis where this is appropriate.

3.4.7 SYNTHESIS AND INTEGRATION

Starting with 2.1 synthesize and integrate all remaining points to arrive at seven points as set out above.

The objective of the synthesis and integration is to work with the collective knowledge, experience and brain power of the entire delegate group to formulate a set of Critical Factors that all delegates can subscribe to and support.

As mentioned previously it is NOT necessary that all delegates agree on all factors, it IS important that they agree to allow space for all factors to exist at this stage. This is accomplished by advising delegates that even if there is a factor that results from the synthesis that is entirely irrelevant in their opinion they do NOT have to persuade the other delegates of their opinion since the weighting stage will provide them an opportunity to weight this item zero AND an opportunity to explain why AND an opportunity for other delegates to agree with them by revising their weighting of that point.

This principle is an extremely important way of removing the need for a person to prove themselves right or defend a particular point as opposed to affording them an opportunity to be heard and present their case and an opportunity for other delegates to either agree or disagree.

3.4.8 SUMMARIZE

Once the synthesis is complete summarize each of the seven Critical Factors by typing in a heading in capital letters at the start of each of the seven points.

This heading should be as short as possible, one or two words is preferable and should be a statement that concisely embraces the essence of what is contained in the verbose composite statement that has been assembled during the synthesis and integration process.

In general it will be found that this heading suggests itself quite intuitively from the bulk of text that has been accumulated against each point and interaction with delegates will result in the headings being defined in quite a short period of time.

Note that in practice I have found that there is no benefit to be gained from fine tuning the wording of the composite statements. I used to do such fine tuning in consultation with delegates but eventually concluded it did not add much value and that since delegates generally became disinterested it was preferable to produce nicely worded statements as a separate activity that did not involve the entire delegate group.

3.4.9 CRITICIZE

Before finalizing the synthesis criticize it in terms of the following points:

a. Logical Consistency

Check for logical consistency -- are there two or more dimensions?

b. Composite Versus Exclusive Statements

Check for consistency in terms of any stated objective relative to composite or exclusive statements?

c. Blind Spots

Check for blind spots:

- What is missing?

Is there some item which now seems intuitive that is missing that has been overlooked and which should be added as a separate point?

If so then combine two other points to make space.

- Other stakeholders?

Are there stakeholders who are not represented and who might add another point?

If so then combine two other points to make space.

- The awkward person who is missing?

Is there some person who was not invited or could not attend the workshop who holds a controversial view that has not been taken into account?

In general, in my experience, the absence of such people can leave gaps in the analysis, take a moment to consider what that person might say and whether it should be taken into account. Keep in mind that delegates do not have to agree with that opinion, they can weight it zero later.

- **Other perspectives?**

Are there any other perspectives that have been overlooked?

- **Specialists?**

Are there specialist opinions that might have a bearing on the subject that are not represented.

If so make provision for them or identify the need to review the synthesis outcome with such people.

Keep in mind that the objective is a fundamentally sound, robust analysis and if all the people or opinions necessary to achieve such an outcome are not present there is limited value in pressing on without these inputs.

In extreme cases it might be decided to place the balance of the analysis on "hold" at this point and to resume it at a later date when the other opinions can be represented. In most cases this will not be necessary and it will be found that delegates can represent those view points with reasonable certainty in order to arrive at a first cut result.

Several iterations may be necessary in any event.

- **Look for possible causes of failure**

In cases where the overall objective of the analysis is a project plan or solution design evaluate whether there are factors that could cause failure of the plan or solution that logically form part of the continuum represented by the Critical Factors which have been overlooked or which should be taken into account at this point.

If there are then add that point or points in.

THE TOOL

The following sheets are provided in the STRATSNAP[®] tool.

ANSOFF MATRIX (Ansoff)

The Ansoff Matrix defines the preferred sequence of growth for any organization starting with existing products for existing markets, moving to existing products for new markets, then new products for existing markets and finally new products for new markets.

At each of these levels risk increases and therefore a low risk growth approach will progress through the four quadrants in a planned manner.

This matrix is provided for reference when considering growth opportunities.

SYNTHESIZE CRITICAL FACTORS (SYNTH CRIT FACT)

The use of the Critical Factor synthesis work area is described in detail starting on page 37.

3.5 CONVERT TO POSITIVE ACTION ORIENTATED STATEMENTS

In the case of a Critical Concerns process or certain other focus questions which may carry a negative connotation, the statements that are synthesized may contain negative language such as *"Management are bureaucratic"*.

In such cases it is recommended that such statements are converted to positive, action orientated statements.

This takes place when the results of the synthesis are loaded into the Critical Factors Dimension 1 work area. See below.

THE TOOL

CRITICAL FACTORS DIMENSION 1 (CRIT FACT DIM 1)

Once the synthesis is complete and there are not more than seven factors in the Synthesis work area, copy and paste the seven factors to the Critical Factors Dimension 1 workspace. Copy and paste "Values".

Once the text has been copied it can be edited if required in order to create concise positive, action orientated statements.

I find that most of the time with effective facilitation the results of the synthesis process are suitable to paste directly into this work area.

In addition I have concluded that in most cases delegate time can be more productively spent in activities other than fine tuning this wording.

Such fine tuning can take place at a later date if required however it is my experience that in general the wording from the synthesis provides a reasonably comprehensive overview of the point and the heading that summarizes the factor forms the essential frame of reference in future references to the analysis.

ABBREVIATED CRITICAL FACTORS DIMENSION 1 (Abbr Crit Fact Dim 1)

The Abbreviated Critical Factors worksheet provides a work area where the detailed description from the synthesis or the revised description on the previous sheet can be summarized and reduced in length to provide a more concise description.

There is also a work area in which a Factor Short Name can be entered.

The text from the Critical Factors result sheet is copied directly onto this sheet by a formula. I generally leave the text "as is".

Alternatively copy the seven factors in the work area and paste "Values" into the work area and then edit the descriptions as seems appropriate. I very seldom do this.

I take the text with the headings and paste "Values" into the Short Name field and then edit off the detail to leave only the headings as the short names. Do

this after printing the worksheet while delegates are privately weighting the Critical Factors on the worksheet.

Alternatively you can formulate short names as a separate exercise on this sheet. I find that the use of the headings from the Synthesis is the fastest and most effective way of developing the Short Names.

The Short Names are used on all the graphs in the remainder of the spreadsheet so it is really important to create meaningful, concise short names.

The **Length Max 98** column on this sheet is a formula that indicates the length of the text in the body of the worksheet. This provides an indication that a maximum of approximately 98 characters will display on subsequent worksheets and provides a frame of reference for editing the Critical Factor descriptions to reduce their length so that they display in full.

As mentioned above, I seldom edit these descriptions but allow them to be truncated wherever they are displayed later on in the spreadsheet. This is a matter of personal preference of the facilitator taking account of work pace and delegate time utilization preferences.

CRITICAL FACTORS DIMENSION 1 EXPLAINED (Crit Fact Dim 1 Expl)

This is a work area to record verbose notes regarding the Critical Factors.

A formula brings the truncated text from the previous sheet onto this sheet and ten rows are provided for text entry.

As much text as your version of Excel will allow, typically 255 characters, can be typed into each cell to describe the factor in more detail.

This information can be typed in with input from delegates or it can be typed in after the workshop and reviewed with a working team. Or this area can be ignored.

I generally do NOT enter data on this sheet in a workshop setting as it seems to me that there are other ways of utilising delegate time that will generally be more productive.

When I am working on my own and analyzing data I quite often enter additional information on this worksheet.

The information that is entered in this worksheet is not used anywhere else in the STRATSNAP® tool. This is simply a work area for recording additional information for future reference.

CRITICAL FACTORS DIMENSION 2 (Crit Fact Dim 2)

As mentioned previously, if the synthesis process identifies a second dimension to the data being analyzed, the synthesis results which describe that dimension can be cut and pasted across to this work area.

In due course another SnapShot® analysis can be undertaken in which this information is pasted into the primary dimension tab of a new STRATSNAP® spreadsheet and then analyzed as described below.

CRITICAL FACTORS DIMENSION 2 EXPLAINED (Crit Fact Dim 2 Expl)

This is the same as the corresponding sheet for Dimension 1. It is used to record additional information about the second dimension Critical Factors.

CRITICAL STAGES (Crit Stages)

As mentioned above, the synthesis process may indicate time based stages in certain cases. In such cases the information will be cut and pasted into this worksheet and then subsequently analyzed in a new SnapShot®.

In some cases, even when the Synthesis does not explicitly indicate a time relationship it may be concluded that there is a basis to determine a time relationship in which case preliminary thinking may be recorded on this worksheet.

CRITICAL STAGES EXPLAINED (Crit Stage Expl)

This is the same as the corresponding sheet for Dimension 1. It is used to record additional information about the Critical Stages if present.

3.6 WORKSHEET

The worksheet is printed out once the Critical Factors for dimension 1 have been defined and entered on the Abbreviated Critical Factors worksheet.

The worksheet provides a work area for delegates to do private weighting and rating of the seven factors as outlined below.

It is important that delegates write their name and initials on the top of the sheet so that the information on the sheets can be captured in the correct location and so that sheets can be handed back to delegates in order for them to capture further information.

Most of the header information and the Critical Factor information is automatically displayed on the worksheet by the software. Only those items indicated by "..." requires manual entry.

If you do not have a printer available during the workshop delegates can write down the seven factors or the factor numbers on a sheet of paper and write their weights and scores on the handwritten sheet.

As a consequence of space limitations Critical Factor descriptive text is truncated on the Worksheet and certain sheets in the tool.

3.7 RANKING AND WEIGHTING

The ranking and weighting process is an intellectual process whereby the consolidated knowledge and experience of each delegate is individually applied in

order to evaluate the relative importance of each factor as well as in order to evaluate the performance of the organization.

It is important that delegates are facilitated step by step through this process using the slides in the Process Guidelines and that delegates are granted sufficient time to seriously consider their opinions on what is considered relevant.

These steps are discussed in more detail in the sections that follow:

Delegates should work on Worksheet 1 which should be printed out once the Critical Factors have been determined and entered into the Critical Factors Dimension 1 worksheet and, if appropriate, edited in the Abbreviated Critical Factors worksheet.

3.7.1 FACTOR RANKING

The first step in the process is to rank the seven factors in terms of relative importance where the most important factor is ranked 1 and the least important factor is ranked 7.

- Rank the factors in order of importance.
- Number the MOST important factor 1.
- Number the LEAST important factor 7.

All factors are important.

Avoid giving two factors the same rank unless you are firmly of the opinion they are of identical importance.

3.7.2 FACTOR WEIGHTING

The factor weighting is the relative importance of the individual factors in terms of the focus of the focus question.

Relative weight involves allocating a total weight of 100% across the seven points and requires delegates to apply their individual knowledge and experience to cognitively assess the relative importance of the seven factors relative to the focus question.

This is an important cognitive intellectual process such that the numbers embody a considerable amount of individual wisdom of delegates.

- a. Refer to the ranking in allocating the weights - if when weighting you revise the ranking that is fine.
- b. The total of the weights for all seven factors must equal 100%.
- c. Spread the weights to reflect the relative importance of the seven factors.
- d. All seven factors are important but some are more important than others.

- e. Typically one or two factors, if not effectively addressed, will give rise to failure of the overall plan or operation.
- f. Typically one or two factors can only succeed if certain other factors succeed.
- g. Try and spread the weights over a range of about 5% for the lowest and 30% for the highest.
- h. In order to do this, select the factor that you consider MOST IMPORTANT, if you consider it far MORE important than any other factor weight it between 30% and 50%.

If you consider it only slightly MORE important than several other factors, weight it between 20% and 30%.

- i. Select the factor that you consider LEAST IMPORTANT.

If you consider it far LESS important than any other factor weight it between 1% and 7%.

If you consider it only slightly LESS important than several other factors, weight it between 8% and 15%.

- j. Only allocate a weight of 0% if you consider the factor totally irrelevant. This is an opportunity for delegates to disagree in a constructive manner.
- k. Spread the remaining weight across the remaining factors.

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.

Try and avoid giving two factors the same weight, generally one will be slightly more important than the other.

If two factors are very close in relative importance the weight gap between them should be small.

If one factor is very much more important than another factor the weight gap between them should be large.

- l. Where delegates have difficulty with mental arithmetic a trick is to number two or three factors the same in round numbers in order to get the weights to add to 100% and then to take the weight of one factor in the set up by a small number and the other down by the same number.

For example, weight three factors 10% and then increase one factor to 12% and reduce one factor to 8% thereby giving a distribution of 8%, 10% and 12%.

3.7.3 ENTRY OF WEIGHTS

Entry of weights takes place on the "Capture Dimension 1 Weights" worksheet.

Weights are captured directly off the worksheets.

The first time the process is run with a particular delegate group I generally take them through the weighting process, have them hand in the worksheets and have the weights captured immediately and discuss them.

Once delegates are familiar with the process I generally have them complete the entire worksheet and have this captured by an assistant while I progress another SnapShot® with delegates.

3.7.4 ANALYSIS OF WEIGHTS

Analysis of weights involves a graphical and tabular examination of the data with delegates.

The weight capture worksheet is used to examine the numeric data and various graphs are provided for examination of the data graphically.

Application of these techniques is discussed relative to each worksheet in the sections that follow.

3.7.5 DISCUSSION OF WEIGHTS: VIEWS OF THE MOUNTAIN

Experience indicates that the weights determined by each delegate are likely to be materially different because of the divergent knowledge and experience sets of delegates both in terms of knowledge and experience of the organization and in terms of contextual and professional knowledge and experience of delegates.

A metaphor that helps to place these diverse views in a non-threatening and constructive context is what I call "the views of the mountain".

This metaphor involves representing the problem space as a mountain to be climbed with the objective being to reach the top of the mountain. This metaphor is depicted graphically on the tab labelled "Mountain". This slide is also included in the Process Guidelines.

The essence of the metaphor is that each delegate comes to the workshop down their own unique life and work journey and thus arrives at the mountain or problem space from a unique perspective.

Accordingly each delegate sees the "mountain" or problem differently.

This is one of the major factors that results in different members of a project team seeing things differently and is also a major factor in arguments within groups of people ranging from board level to the most junior operational people.

One persons knowledge and experience causes them to draw a different conclusion from the same information to that drawn by another person.

If both people become positioned around these perspectives strife can easily result.

The approach advocated in this manual and facilitated by the software allows each person to hold their perspective and describe it without having to become positioned.

The metaphor assists people to recognize that this is acceptable while at the same time assisting all concerned to recognize that if everyone tries to climb the mountain up their own path it is unlikely that everyone will get to the top of the mountain at the same time or even get there at all.

If the top of the mountain is used to represent the solution that a group of people or an organization are trying to find then the metaphor assists people to see that it is in everyone's interests and the interests of the organization that all climb the mountain by the same route so that they can assist one another.

In general, while there may be an optimum path up every mountain it is likely that there are a number of viable routes and it is less important which route is chosen than that everyone chooses to climb the mountain by the same route.

This metaphor is a powerful way of assisting people from moving off positions and choosing to adopt a different view of the problem and solution.

While the metaphor represents a high level of inherent complexity in its simplest form it refers to the relative weights determined by each delegate.

Insofar as the relative weights reflect the relative importance of each component of the problem diagnosis and therefore the solution as determined by the process they reflect the relative emphasis to be placed on each factor in developing and executing the solution.

Thus, while everyone assigns different weights and therefore different priorities to the different factors it is very difficult for any form of sustained team effort to be effective.

By discussing the weights every delegate is afforded an opportunity to present their opinions.

Typically finance people will tend to attach more weight to financially focused factors, marketing people will favour customer and market factors, human resource people will favour people related factors, etc.

The discussion of the weights provides a useful opportunity for different delegates to present their views in a non-threatening environment. The extent to which the situation is non-threatening is significantly influenced by the manner in which you facilitate this component -- stress that there are no right and wrong answers and encourage delegates to share their opinions openly and honestly.

This also requires that supervisors and managers are committed to not penalising people for divergent views.

Once all delegates have been afforded an opportunity to express their views a decision can be taken to adopt either the numeric average of the weights or some other weight structure.

In general I recommend the numeric average, however the senior manager or executive may elect to adopt a different set of weights. If this is done it should be done in a diplomatic way with clear statement of intention and motivation so that delegates can make a clear choice to accept the decision remembering the executive prerogative of the sponsor.

In practice I have very seldom found a manager or executive elect to over ride the numeric average and there are sound reasons to adopt the numeric average in most situations.

In facilitating discussion of the weight, there is a need to optimise time taken in discussion or presentation against communication and consensus. With even a small number of delegates a few minutes of discussion each can rapidly result in an elapsed time that will significantly impact on the time table for the workshop.

It is important to consult with the sponsoring executive or manager ahead of time to evaluate how much discussion they want to allow so that this is taken into account in planning the workshop.

I generally allow about two minutes per delegate and ask delegates to only highlight the key points have not yet been raised. Two minutes requires tight and sensitive facilitation.

Under certain circumstances one could usefully allow five or ten minutes for each delegate to present their perspective and for questions and discussion by other delegates. In some cases, where a primary objective is team building and developing a collective understanding even more time might be allowed.

In such a case it is important that only a few, or even only one, SnapShot[®] are scheduled for a particular day.

There are various ways of facilitating the discussion. If there is a senior manager or executive present I frequently ask them to present their interpretation first, thereby allowing all delegates to hear their point of view.

In other situations I will review the first factor and identify the delegate who has assigned the highest weight and ask them to present their perspective and then ask the delegate with the lowest weight to present their perspective.

I do this with each factor in turn until all delegates have presented their view or all factors have been discussed. If there are more delegates I then ask them to fill in anything that they think has been left out.

I am of the view that it is desirable for every delegate to be given an opportunity to be heard, even if only for a minute or two. Again this is a matter of planning and facilitation management.

If the objective is to collect as much information as possible then it may be decided not to afford time for every delegate to speak.

In such a case it may be preferable not to have discussion at all. In some cases I do this when I want to process a large number of SnapShots® in a short space of time.

Insofar as unless you take active measures to record what is said, the discussion is largely lost, a weighting exercise without discussion is a valid means of acquiring reasonably accurate data.

If time is permitted for discussion then it is recommended that delegates are afforded an opportunity to change their weights after all have presented their views and that summary findings are recorded.

Where shares do take place it can be useful to have a "scribe" to make notes and type them up as supporting documentation IF you think this will be valuable.

Once there has been discussion and the weights have been reviewed, draw any conclusions that seem relevant or simply accept the numeric average and move on.

A useful introduction to the weight results the first time the process is undertaken is a statement to the effect that:

"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 analyze in detail what each person is thinking about these topics we would find drastically different views!"

At this point the Weight Distribution Graph can be displayed to illustrate the extent to which delegates see the situation differently.

This leads in to the graphic of the mountain discussed above and this then leads in to review of the numeric weights and presentation or sharing by each delegate of their perspectives.

An important philosophic point with regard to the conclusion can be summarized as *"Together we can find the best way to the objective"*

From a long term planning and execution perspective it is important that there is agreement that once the team have agreed on a set of weights they should stick to them.

At the same time, recognize that in any analytical, investigational and planning situation there may be a need for iteration. In general up to three iterations may be called for.

However, if the objective is to gain a reasonably wide spread of representative data then a single iteration over a larger number of SnapShots® is preferable to several iterations over a smaller number of SnapShots.

To some extent this is philosophical, however I prefer to gather as wide a selection of first approximation data as possible rather than to spend more time seeking greater precision on a lesser spread of data.

In all of this REMEMBER THE TIME IMPACT. A single SnapShot® facilitated with tight time management with a small number (five to ten) of focused and motivated results orientated delegates will take at least one and a half hours.

With a large number of delegates or delegates who need to be heard or where team building is a priority a single SnapShot® can take an entire day or even two days.

If there are obstructive delegates and no management or executive support to constrain such delegates a single SnapShot® can take two days or longer.

The worst case I have experienced was in a Government Department where a senior official repeatedly interfered with the process. Finally, late on the afternoon of the second day of the first SnapShot® a deliberate political sabotage agenda was exposed.

In terms of the Strategic Planning objective of the workshop the process was a failure, in terms of exposing a long suspected sabotage agenda the process proved very powerful. Eventually the words and the numbers of the delegate conflicted at such a level that their colleagues could see what was going on.

3.7.6 CHOICE OF OUTCOME

On completion of the process choose "the route up the mountain", in other words, choose the weights that are to be applied. As discussed above this would typically be the numeric average but there is provision in the tool for a manual over ride in the adjustment (**Adj***) column.

It is not necessary for delegates to agree that this is the best way, it IS important that they choose to agree that these are the priorities that are to be applied to the project or solution and that the overall design will be based on these weights.

As experience is gained with the design it is possible that the project team may decide to adjust the weights to reflect increased understanding of the optimum solution. This can be done judiciously but should NOT be done frequently as this will engender doubt and suspicion.

If changes are made it is really important that there is very detailed communication with those who need to know and ALL who have been involved up to that point so

that a situation does not occur where people continue to operate on the basis of out of date numbers or start to suspect a breach of integrity.

For this reason it is suggested that change of weights should be avoided after the first workshop unless really desirable AND properly planned and implemented as part of an explicitly stated iterative process. In such a case clearly define the number of iterations up-front and clearly publicize once the iterations have been completed.

3.7.7 WEIGHTING CONCLUSIONS

Once the weights have been discussed draw any conclusions and document them.

THE TOOL

The above is accommodated as follows in the tool:

WORKSHEET 1 (WORKSHEET 1)

Worksheet 1 is printed out once the synthesis and integration has been completed, posted into the Dimension 1 Critical Factor worksheet and edited as necessary in the Abbreviated Critical Factors worksheet.

Depending on the nature of the analysis being undertaken the weight and score may not be relevant.

If the tool is being used as an aid to facilitate the analysis of the major sections of a presentation, course, report or similar the process may end after the synthesis and integration and possibly entry of additional information in the "explanation" sheet.

In other cases the relative weights may be determined as part of an analysis and this may be the end of the process.

In the case of full scale long term analysis and design weights and scores should be determined.

This process can proceed quickly once delegates are familiar with the process and tool, thus I generally gather weights and scores even if time does not permit any discussion and the weights and scores are captured after the workshop.

This is a convenient way of rapidly gathering additional information over and above the synthesis of the Critical Factors.

When it comes to planning, I hold the view that without the relative weights the information is of limited value and, accordingly, I always endeavour to obtain the weights at least.

Rank

Delegates enter the rank as described above.

Entry of the rank is a device to facilitate delegate thinking process, the ranks are NOT captured in the tool.

Relative Weight

Entry as described above.

This is one of the most important steps in the process and delegates should be given sufficient time to do this and there should be sufficient facilitation and explanation the first time delegates are exposed to the process.

Historic Score

The score out of ten, as described below, that applied historically the number of forward planning years in the past.

If the forward planning period is three years then the historical analysis period would also be three years. I typically use three years unless undertaking a really long range plan in which case I might use five or ten years or if developing a very short term operational plan in which case I might use one year.

Current Score

The score today, as things are at present.

Forecast Score

The level things are expected to be at the end of the planning period if the plan does not result in action or if the planning did not take place.

Objective Score

The level delegates would like things to be at the end of the planning period. Refer subsequent discussion.

CAPTURE DIMENSION 1 WEIGHTS (CAPTURE DIM 1 WEIGHTS)

Delegate initials are automatically posted onto the column headings of this sheet from the Delegate List.

The sheet provides for up to thirty delegates.

It is recommended that this is the maximum number of delegates in a single workshop. In my experience thirty delegates results in a large amount of discussion and slow progress. There also tend to be more voices than can be effectively and conveniently heard.

If there is a real need to interact with thirty or more people it is preferable to run several workshops with groups of delegates selected on the basis of some common denominator.

The overall results can then be integrated.

My choice is to run the process with a maximum of between fifteen and twenty five delegates.

If there are less than thirty delegates hide the excess columns.

If the process is to be run with several sessions then either:

- a. Allow each group to go through the full brainstorming, synthesis, weighting and scoring process and compare and integrate the data later with a smaller analysis team

or

- b. Take the first group through the full process and with subsequent groups once they have undertaken their own private synthesis and possibly given you their factors, table the results of the previous group as the default in the synthesis sheet and then adjust and fine tune the results with this group.

If there are material changes it is important that these are communicated back to the delegates from the previous sessions.

This approach has the benefit of progressively refining the factors provided the delegates to each session are representative of a common constituency.

If each group represents a different constituency this provides a way of evaluating the gap between constituencies.

If each delegate group is chosen to deliberately represent a different constituency the gap between those constituencies can be evaluated numerically by developing factors for that constituency and having the constituency ALSO rate the factors developed by other constituencies.

MOUNTAIN GRAPHIC (Mountain)

The graphic described above is included in the tool for convenience. It is also included in the Process Guidelines.

WEIGHT GRAPH DATA (Wgt Gr Data)

The data on which the following graphs are based.

This is a working sheet which has not been hidden in order to allow you delete unwanted columns.

If a delegate misses a session or if there are fewer than thirty delegates the graphs look neater if the columns containing zero data are deleted.

Unprotect the sheet, highlight the columns containing zero data and delete them.

WEIGHT DISTRIBUTION GRAPH (Wgt Dist Gr)

This graph gives a line plot for each factor across all delegates.

It demonstrates the level of uniformity or difference in delegate weights.

In my experience I have found that even management teams that have been working together for years will have very different opinions regarding the weights.

These different weights constitute the different views of the mountain and this graph is a very useful and sometimes powerful mechanism for demonstrating these different views.

I generally display this graph first after the weights have been captured and then discuss the mountain metaphor and the numbers.

STACKED WEIGHT GRAPH (Stacked Wt Gr)

A different view of the data.

Serves to highlight where delegates have specific differences.

The value of this graph varies depending on the data.

WEIGHT STATISTIC DATA (Wgt Stat Data)

The data for the weight statistic graphs.

There is no need to do anything on this sheet.

It is not hidden so that the workings behind the graphs are available for inspection and alteration if required.

WEIGHT STATISTIC GRAPH (Wgt Stat Gr)

Line plot across the seven Critical Factors with average, mean plus and minus one standard deviation and maximum and minimum lines.

This graph highlights the overall weight trends in terms of particular factors with much higher or lower weights and the spread of results giving some indication of the level of agreement / certainty.

Where the spread between maximum and minimum is small it indicates small variability between delegates, when it is large it indicates high variability.

Small or large spread of the values plus and minus one standard deviation give more specific indication of the spread.

WEIGHT PIE GRAPH (Wgt Pie)

Pie chart which will make major differences in weight visible.

CAPTURE WEIGHT INTERPRETATION (CAPTURE Wt Interpret)

For capture of comments about the weight interpretation.

3.8 SCORE

Once the weights have been determined the factors can be scored.

In some cases, such as developing the structure of an article, presentation or book, scoring will not be undertaken.

In most other cases scoring is recommended.

It does not take long to do in the workshop as the worksheet has already been printed.

Data can be captured after the workshop if necessary.

Examination of the data and particularly the trend graphs will frequently give important indicators of issues and priorities.

Score data can be captured by the process assistant while delegates are busy with the next SnapShot®.

3.8.1 BASIS OF SCORING

Factor scores are allocated on a range of 0 to 10 where:

- a. 0 (zero) indicates that the performance could NOT BE WORSE - in the world.
- b. 10 indicates that the performance could NOT BE BETTER - in the world

Each factor is scored separately from 0 to 10.

The upper and lower bound values of worst and best in the world can be replaced with more limited boundaries such as best and worst in the organization or similar if considered appropriate.

However, I am of the opinion that scoring in terms of best and worst in the world within the constraints of delegate knowledge and experience is a preferable rating as it brings some overall context and reality check relative to delegate experience.

3.8.2 SCORING INDICATORS

The following descriptors have been allocated across the ten point scale to assist with interpretation and rating:

- 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

A broad interpretation of the factor scoring is as follows:

0 to 3.3 Cause for serious concern

3.3 to 6.7 Average -- fairly typical

6.7 to 10 World Class

Note that in other areas of life a rating of 66% would be regarded as highly satisfactory.

For example, if one's child obtained an aggregate of 66% in their final exams at school it is highly unlikely one would send them back to school to repeat their final year. On the contrary, one would probably be very satisfied.

Accordingly, one should only consider an objective of in excess of 66% if there are very strong reasons to set such a high target.

If such a high target is set there should be a very clear definition of how such higher score is going to deliver real value to the business.

3.8.3 TIME BASIS OF SCORING -- HISTORIC, CURRENT, FORECAST AND OBJECTIVE

The time basis of scoring is shown graphically in the Process Guidelines presentation.

The time basis, based on the planning interval, comprises:

- a. Historic score -- period of time equal to the planning interval in the past.
- b. Current score -- the score today.
- c. Forecast score -- the score at the end of the planning period if no new initiatives are undertaken and successfully completed, i.e. if the planning initiative of which this analysis forms part is not successfully carried through and implemented.
- d. Objective score -- the desired rating at the end of the planning period.

3.8.3.1 Historic Score

Rating of performance at a time equal to the planning period in the past.

How well were we doing then?

Keep in mind how bad it could have been and how good it could have been.

The historic score provides a trend basis for assessing whether things are deteriorating, improving or neutral.

Where delegates were not with the organization at that time in the past request that they rate the historic score on the basis of what they have heard from others or leave it blank in the event that they do not have an opinion at all.

Do NOT rate the historic score zero (0) if a delegate has not information, this will distort the statistics.

3.8.3.2 Current Score

Current rating of performance.

TODAY.

How well are we doing now?

3.8.3.3 Forecast Score

What you expect the score would be if this planning exercise:

- a. Did not happen.
- b. Does not lead to any constructive action.
- c. Does not deal with what delegates consider to be the critical issues.

The forecast represents where the organization will be without meaningful and effective NEW action.

- a. Equal to CURRENT if delegates think that there will be NO material change in the planning period.
- b. Less than current if delegates think that the situation is deteriorating with no sign of other actions likely to give rise to improvement.
- c. Greater than current if delegates think that the situation is improving as a result of other actions.

Note that if the forecast is an acceptable rating then there is no need for new action and the objective can be set equal to the forecast.

It is NOT necessary for the objective to be greater than the forecast if the forecast is considered to be satisfactory.

3.8.3.4 Objective Score

How delegates would like the organisation to be performing after the planning period.

Aim for the Stars in order to Hit the Tree Tops (set a stretch target).

Take account of the practical limitations on improvement (i.e. be optimistically realistic).

Recognize that delegates would probably be satisfied if their child obtained 66% at the end of their school career and would be very happy if they obtained 80%.

The objective should be EQUAL to or LARGER than the forecast score.

Objective less than forecast is NOT valid.

It is easier to achieve major improvement on a very low forecast score than on a high forecast score.

Major improvement is probably not necessary for a high forecast score.

3.8.4 WORKSHEET -- SCORES

The worksheet has columns for entry of the historic, current, forecast and objective scores.

Delegates should enter these ratings privately and the worksheets should then be handed in for capture.

The Process Guidelines contain a series of slides to be used in facilitating delegates through the scoring process.

It is recommended that the first time delegates undertake a scoring activity that you guide them through it one step at a time. That is, explain the historic and then let them score the historic, explain the current and then let them score the current, etcetera.

3.8.5 ENTRY OF SCORES

The historic, current, forecast and objective are entered in four tables one above the other in a single sheet.

Scroll down the table and enter the scores for all four states for one delegate and then scroll back to the top of the schedule and enter the scores for the next delegate.

3.8.6 QUALITY CONTROL OF SCORES

The quality control sheet performs some simple arithmetic and displays the differences in ways that highlights anomalous behaviour.

The objective of this sheet is to enable the facilitator to identify situations where a delegate has misunderstood the basis of the scoring, or made an error or where the data entry is incorrect.

This page can be skimmed quickly in order to highlight errors and anomalies or they can be picked up from the graphs.

There are brief notes on the sheet regarding the error conditions.

3.8.7 ANALYSIS OF SCORES

The scores are analyzed by examining the graphs.

I do not review the numbers with delegates owing to time constraints but they could be analyzed and discussed in the same way the weights are discussed if this is considered necessary and time permits.

The graphs generally provide a sufficiently detailed view of the scores.

3.8.8 DISCUSSION OF SCORES

I generally run through the graphs and offer my interpretation and obtain input as seems appropriate.

Generally discussion is limited as the overall averages are usually accepted by delegates without difficulty.

The score trend graphs are particularly important in terms of interpreting the overall results of the scoring and should be examined even if no other graphs are examined.

The weighted score gap analysis is also an important graph and highlights where there are specific factors that require attention.

Make notes as appropriate of what delegates say, draw conclusions and document as appropriate.

THE TOOL

SCORES (SCORES)

The data capture area as discussed above.

SCORE DATA (Sc Dat)

The data for the score graphs.

Delete columns for delegates that are absent and for surplus delegates as for the weight data sheet.

SCORE GRAPH (Score Gr)

Shows historic, current, forecast and objective per delegate.

Gives an indication of differences of opinion between delegates.

Where there are noticeable differences and time permits ask delegates for their reasons.

Pay particular attention to the trend of historic to current to forecast to objective. This is an important indicator of the health of the situation and of required action.

HISTORIC STACKED GRAPH (Hist Stack Sc Gr)

Another way of looking at the data, may be valuable in some situations.

I generally flip through the various graphs briefly and only stop and discuss or comment where there is a graph that has some trend or anomaly that seems worth considering.

Each graph has value in certain situations.

CURRENT STACKED GRAPH (Curr Stack Sc Gr)

As for historic stacked graph.

FORECAST STACKED GRAPH (Fcst Stack Sc Gr)

As for historic stacked graph.

OBJECTIVE STACKED GRAPH (Obj Stack Sc Gr)

As for historic stacked graph.

SCORE STATISTIC DATA (Sc Stat Dat)

As for weight statistic data.

SCORE STATISTIC COMPARISON (Sc Stat Comp)

The scores analyzed across the seven factors in terms of historic, current, forecast and objective.

Can highlight important trends.

HISTORIC SCORE DISTRIBUTION GRAPH (Hist Sc Dist Gr)

The scores analyzed across the seven factors in terms of average, mean plus and minus one standard deviation, maximum and minimum.

Gives an indication of overall delegate spread.

Pay particular attention to the trend of historic to current to forecast to objective. This is an important indicator of the health of the situation and of required action.

CURRENT SCORE DISTRIBUTION GRAPH (Curr Sc Dist Gr)

As for historic score.

FORECAST SCORE DISTRIBUTION GRAPH (Fcst Sc Dist Gr)

As for historic score.

OBJECTIVE SCORE DISTRIBUTION GRAPH (Obj Sc Dist Gr)

As for historic score.

HISTORIC SCORE PIE GRAPH (Hist Sc Pie)

As for weight pie graphs.

CURRENT SCORE PIE GRAPH (Curr Sc Pie)

As for weight pie graphs.

FORECAST SCORE PIE GRAPH (Fcst Sc Pie)

As for weight pie graphs.

OBJECTIVE SCORE PIE GRAPH (Obj Sc Pie)

As for weight pie graphs.

SCORE TREND DATA (Sc Trend Dat)

The data for the score trend graphs, for information.

SCORE GENERAL TREND GRAPH (Sc Gen Trend Gr)

The trend per factor across historic, current, forecast and objective.

Forecast and objective are plotted sequentially for technical convenience.

This graph gives a simple view of how delegates have rated each factor in terms of rate of improvement or deterioration of each factor.

Validate overall trends with delegates. This is an important graph in order to gain an understanding of planning priorities.

SCORE TREND GRAPH (Sc Trend Gr)

This is generally the most important graph.

It shows the overall trend of historic to current to forecast and then an approximate exponential curve of historic to current to objective superimposed.

This corresponds to the graph in the Process Guidelines which illustrates that any change follows an exponential trajectory. This plot presents this approximately.

If the overall trend of historic, current and forecast is upward and the forecast is satisfactory it is quite possible that there is no requirement for new initiatives.

If this trend is upward or horizontal and the forecast is not acceptable then it indicates new action is required.

If the historic to current to forecast trend is down then it indicates a need for new action, particularly if the trend is strongly downward.

If the trend is strongly upward new action is probably not required.

SCORE QUALITY CONTROL (SCORE QUALITY CONTROL)

The score quality control provides some calculations as discussed above which are used to highlight errors or outlying opinions.

This may be reviewed during a workshop if time permits however if there are more than about six delegates one or two small errors are not significant and gross errors or deviations will be visible from the graphs.

3.8.9 CONCLUDE

After the score trend the summary table provides useful reference information and the unweighted and weighted score graphs provide an indication of specific "hot spots" for action.

The sub-factor determination provides a work area to classify each factor into up to seven sub-factors.

The acceptance sheets provides facilities to obtain delegate ratings of the acceptability of the results.

THE TOOL

CRITICAL FACTOR SUMMARY (CRITICAL FACT SUMMARY)

The Critical Factor summary table summarises the principal numeric results for convenience and applies the weights to the scores giving a more direct indication of priority for action.

This data is graphed on the graphs that follow.

Note that the weighted score no longer has a maximum value of ten because of the application of weights. Base interpretation on relative gaps and NOT on the ten point scale given above.

GAP GRAPH DATA (Gap Gr Dat)

The gap graph data is an internal worksheet displayed for information.

UNWEIGHTED SCORE GRAPH (UnWt Sc Gr)

The unweighted score graph summarises the scores across the seven factors and is basically the same as the earlier score graph with only the current, forecast and objective displayed.

WEIGHTED SCORE GRAPH (Wt Sc Gr)

The weighted score graph is an important graph as it highlights those components that have a high score gap and high weight.

NOTE that the vertical scale on this graph is NOT capped at ten (10).

This graph is particularly important in terms of prioritising scarce resources. Where the weighted gap is large this indicates a high priority activity.

SUB-FACTOR DETERMINATION (SUB-FACTOR DETERMINATION)

In some cases the analysis and particularly the brainstorming and synthesis may indicate the need to segment some or all of the Critical Factors into sub-factors.

This sheet provides a workspace to enter sub-factors directly.

Alternatively a separate SnapShot® exercise can be undertaken for each Critical Factor in order to segment it into sub-factors and weight and score the sub-factors.

By starting at the top and progressively segmenting factors into sub-factors, sub-sub-factors, etcetera a structured framework is created to cascade the weights and gaps down the logical structure that is created in such a way that a comprehensive structured and prioritised plan can be created.

ACCEPTANCE WORKSHEET (ACCEPTANCE Worksheet)

A worksheet for delegates to indicate their level of acceptance of the results.

I do not use this facility in time pressured situations.

ACCEPTANCE RESULTS (ACCEPTANCE RESULTS)

Sheet for entry of the acceptance data.

ACCEPTANCE DATA (Accept Dat)

Data for the graph. Delete columns that are not used.

ACCEPTANCE GRAPH (Accept Gr)

Graph of acceptance results.

POST OUT SESSION DETAILS (Post Out Sess Det)

The data to be posted out to StratSnap® Resources and StratGap®.

END PROCESS (End Proc)

Place marker to indicate the end of the spreadsheet and the StratSnap® process.

CHAPTER

4

STRATSNAP[®] RESOURCES

A spreadsheet for analysis of various resource parameters at a macro plan level.

This is useful for coarse estimates although in practice I find that I use the other modules much more frequently than this.

THE STRATSNAP[®] RESOURCES SPREADSHEET**TITLE SHEET (1)**

As for previous sheets.

MENU (Menu)

As for previous sheets.

OPERATIONAL NOTES (Operational Notes)

Some notes on use of the spreadsheet.

POST IN DELEGATE LIST (Post In Del Lst)

As for previous sheets.

POST IN SESSION DETAILS (Post In Sess Det)

As for previous sheets.

POST IN STRATSNAP (Post In StratSnap)

As for previous sheets, post in data from the StratSnap[®] spreadsheet.

SESSION DETAILS (SESSION DETAILS)

As for previous sheets.

DELEGATE LIST (Del Lst)

As for previous sheets.

WORKSHEET 2 RESOURCE ALLOCATION (WORKSHEET 2 Res Alloc)

Worksheet for the resource allocations.

RELATIVE WEIGHT RESOURCE ALLOCATION (Rel WEIGHT RESOURCE ALLOCATION)

Sheet for entry of resource allocation on a relative weight basis for the categories:

- a. Value added.
- b. Effort / manpower.
- c. Capital investment.
- d. Operating expenses.
- e. Other resources.

Useful for management to assign an overall indication of the relative resource allocation that they consider appropriate.

This relative weight can then be applied to overall budget amounts to determine allocation to each component.

RESOURCE ALLOCATION RELATIVE WEIGHT DATA (Res Alloc RW Dat)

Calculation sheet for the above.

VALUE ADDED RELATIVE WEIGHT BY DELEGATE STACKED GRAPH (Val Add RW Del Stack Gr)

Graph to highlight delegate ratings, as for the comparable graphs for StratSnap® weights for value added.

VALUE ADDED RELATIVE WEIGHT DISTRIBUTION GRAPH (Val Add RW Distr Gr)

As for StratSnap® weights.

VALUE ADDED RELATIVE WEIGHT PIE GRAPH (Val Add RW Pie)

As for StratSnap® weights.

EFFORT RELATIVE WEIGHT BY DELEGATE STACKED GRAPH (Eff RW Del Stack Gr)

As for StratSnap® weights.

EFFORT RELATIVE WEIGHT DISTRIBUTION GRAPH (Effort RW Dist Gr)

As for value added.

EFFORT RELATIVE WEIGHT PIE GRAPH (Effort RW Pie)

As for value added.

CAPITAL EXPENDITURE RELATIVE WEIGHT BY DELEGATE STACKED GRAPH (Capex RW Del Stack Gr)

As for value added.

CAPITAL EXPENDITURE RELATIVE WEIGHT DISTRIBUTION GRAPH (Capex RW Distr Gr)

As for value added.

CAPITAL EXPENDITURE RELATIVE WEIGHT PIE GRAPH (Capex RW Pie)

As for value added.

OPERATING EXPENSE RELATIVE WEIGHT BY DELEGATE STACKED GRAPH (Opex RW Del Stack Gr)

As for value added.

OPERATING EXPENSE RELATIVE WEIGHT DISTRIBUTION GRAPH (Opex RW Dist Gr)

As for value added.

OPERATING EXPENSE RELATIVE WEIGHT PIE GRAPH (Opex RW Pie)

As for value added.

OTHER RESOURCE RELATIVE WEIGHT BY DELEGATE STACKED GRAPH (Oth Res RW Del Stack Gr)

As for value added.

OTHER RESOURCE RELATIVE WEIGHT DISTRIBUTION GRAPH (Oth Res RW Dist Gr)

As for value added.

OTHER RESOURCE RELATIVE WEIGHT PIE GRAPH (Oth Res RW Pie)

As for value added.

ABSOLUTE VALUES PER DELEGATE STACKED GRAPH (Abs Values Del Stack Gr)

Graph of all absolute values for distribution displayed to highlight variances per delegate.

RESOURCE TOTAL AMOUNT DISTRIBUTION (Res Tot Amide Distr)

Statistics of total amount distribution to highlight variances per category.

WORKSHEET 3 RESOURCE AMOUNT (WORKSHEET 3 Res Amide)

Worksheet for entering absolute amounts for the different components as an ALTERNATIVE to the relative weight approach.

CAPTURE FACTOR QUANTITY AMOUNT (CAPTURE FACTOR QUANTITY AMOUNT)

Capture absolute amounts as for relative amounts.

FACTOR QUANTITY AMOUNT DATA (Fact Qty Amide Data)

Graph data.

CUMULATIVE FACTOR QUANTITY GRAPH (Cumm Fact Qty Gr)

As for relative amounts.

FACTOR QUANTITY DISTRIBUTION GRAPH (Fact Qty Distr Gr)

As for relative amounts.

RESOURCE AMOUNT (RESOURCE AMOUNT)

RESOURCE AMOUNT PER DELEGATE DATA (Res Amide Per Del Dat)

RESOURCE AMOUNT PER DELEGATE GRAPH (Res Amide Per Del Gr)

RESOURCE AMOUNT DATA (Res Amount Dat)

CUMULATIVE VALUE ADDED AMOUNT BY DELEGATE (Cumm Val Add Amide Del)

VALUE ADDED AMOUNT DISTRIBUTION GRAPH (Val Add Amide Distr Gr)

As for relative amounts.

VALUE ADDED AMOUNT PIE GRAPH (Val Add Amide Pie)

As for relative amounts.

CUMULATIVE EFFORT AMOUNT BY DELEGATE (Cumm Effort Amide Del)

As for relative amounts.

EFFORT AMOUNT DISTRIBUTION GRAPH (Effort Amide Distr Gr)

As for relative amounts.

EFFORT AMOUNT PIE GRAPH (Effort Amide Pie)

As for relative amounts.

CUMULATIVE CAPITAL EXPENDITURE AMOUNT GRAPH (Cumm Capex Amide Del)

As for relative amounts.

CAPITAL EXPENDITURE AMOUNT DISTRIBUTION GRAPH (Capex Amide Distr Gr)

As for relative amounts.

CAPITAL EXPENDITURE AMOUNT PIE GRAPH (Capex Amide Pie)

As for relative amounts.

CUMULATIVE OPERATING EXPENSE AMOUNT BY DELEGATE (Cumm Opex Amide Del)

As for relative amounts.

OPERATING EXPENSE AMOUNT DISTRIBUTION GRAPH (Opex Amide Distr Gr)

As for relative amounts.

OPERATING EXPENSE AMOUNT PIE GRAPH (Opex Amide Pie)

As for relative amounts.

**CUMULATIVE OTHER RESOURCE DISTRIBUTION AMOUNT BY DELEGATE
(Cumm Oth Res Amide Del)**

As for relative amounts.

OTHER RESOURCE AMOUNT DISTRIBUTION GRAPH (Oth Res Amide Distr Gr)

As for relative amounts.

PERCENTAGE VALUE ADDED (% VALUE ADDED)**PERCENTAGE VALUE ADDED DATA (% Val Add Dat)****PERCENTAGE VALUE ADDED CUMULATIVE GRAPH (% Val Add Cumm Gr)****PERCENTAGE VALUE ADDED DISTRIBUTION GRAPH (% Val Add Distr Gr)****PERCENTAGE VALUE ADDED COMPUTED AMOUNT (% VALUE ADDED
COMPUTED AMOUNT)****PERCENTAGE VALUE ADDED AMOUNT DATA (% Val Add Amide Dat)****PERCENTAGE VALUE ADDED AMOUNT DISTRIBUTION GRAPH (% Val Add
Amide Distr Gr)****CRITICAL FACTOR SUMMARY (CRITICAL FACTOR SUMMARY)****ACCEPTANCE WORKSHEET (ACCEPTANCE Worksheet)**

As for StratSnap®.

CAPTURE ACCEPTANCE RESULTS (CAPTURE ACCEPTANCE RESULTS)

As for StratSnap®.

ACCEPTANCE DATA (Accept Dat)

As for StratSnap®.

ACCEPTANCE GRAPH (Accept Gr)

As for StratSnap®.

POST OUT STRATSNAP RESOURCES (Post Out SS Resources)

Not currently used elsewhere.

END OF PROCESS (End Proc)

As for StratSnap®.

STRATGAP[®] GAP ANALYSIS

The gap analysis is an extremely useful tool for planning purposes.

It provides a structured framework to facilitate the transformation of the quantified gaps out of STRATSNAP[®] into plan actions.

STRATSNAP[®] GAP ANALYSIS SPREADSHEET

TITLE SHEET (1)

As STRATSNAP[®] above.

MENU (Menu)

As STRATSNAP[®] above.

POST IN WORKSHOP DETAILS (Post In Wksh Det)

As STRATSNAP[®] above from Session Master.

POST IN DELEGATE LIST (Post In Del Lst)

As STRATSNAP[®] above from Session Master.

POST IN SESSION DETAILS (Post In Sess Det)

From STRATSNAP[®].

POST IN STRATSNAP (Post In StratSnap)

From STRATSNAP[®].

SESSION DETAILS (SESSION DETAILS)

Repeat of data posted in.

CRITICAL FACTORS LIST (Critical Factors)

Reference sheet with data from STRATSNAP[®].

MOST OF THE FOLLOWING TABS ARE THE SAME FOR EVERY GAP

The same sheets are repeated for every Critical Factor.

GAP 1 SYNTHESIZE PROJECTS (G1 SYNTHESIZE Projects)

Synthesis and integrate process the same as for STRATSNAP® but this time for projects or activities and limited to a MAXIMUM of seven.

This is intended to focus attention on the factors that will REALLY make a difference.

Projects identified for one Critical Factor will frequently benefit other Critical Factors.

Facilitate the synthesis process in a similar manner as for STRATSNAP®.

Enter short names on the sheet.

Projects are fed forward onto subsequent sheets.

GAP 1 PROJECT LIST (G1 Project List)

The summary from the synthesis by formula.

Copy and paste values and edit if you require more concise statements.

GAP 1 PROJECT EXPLANATION (G1 Project Expl)

As for the explanation sheets in STRATSNAP®.

GAP 1 WORKSHEET 1 (G1 WORKSHEET 1)

Worksheet to printout for delegates to determine the first parameters of the gap analysis.

Alternatively this analysis can be done on screen by group consensus.

SUGGESTED STANDARD IMPLEMENTATION AREAS (Implementation Areas)

A basis for analyzing the plan.

The items here are suggestions based on our analysis of what is critical for management of successful strategic plans.

SUGGESTED STANDARD FUNCTIONAL AREAS (Functional Areas)

An alternative basis for analyzing the plan. This allows the projects that form part of the plan to be allocated to major operational areas of business management.

It is recommended that projects should be determined on a business functional basis so that they can be linked in to operational management.

GAP 1 CAPTURE (G1 CAPTURE)

Capture of the data.

Note that the idea of this worksheet is to formulate a rough cut first round plan in order to assess resource requirements against expected value and other parameters in order to determine what is practical.

It is important to recognize that just because a group of people think that a particular project is a good idea does not mean that it is economically viable in terms of practical resource constraints or that it will deliver expected business benefit.

Further analysis is required and this sheet is provided for this purpose.

GAP 1 WORKSHEET 2 (G1 WORKSHEET 2)

This provides a work area for the resource estimates.

Note that the lower bound -- upper bound estimating approach minimizes the time required for group discussion.

Let each delegate arrive at their own lower bound and upper bound estimates for each resource for each project and then simply take the lowest of the low estimates and the highest of the high estimates without discussion.

Provided the delegates have sufficient knowledge and experience of the business and the envisaged project this will give a reasonable first cut estimate.

The most likely requirement lies half way between the low and high estimates. Specific effort must be applied in order to drive the costs down below the high estimate and particularly to drive them down below the mid-point.

GAP 1 SUMMARY GRAPH DATA (G1 Summary Gr Dat)

Graph data.

All graphs are provided in order to aid interpretation of results. Use and interpret as appropriate.

GAP 1 GAP CONTRIBUTION RELATIVE WEIGHT GRAPH (G1 Gap Contr RW Gr)

GAP 1 CURRENT SCORE GRAPH (G1 Curr Score Gr)

GAP 1 RESOURCE SUMMARY GRAPH (G1 Resource Summ Gr)

GAP 1 FINANCIAL RESOURCES GRAPH (G1 Fin Res Gr)

MOST OF THE PREVIOUS TABS ARE THE SAME FOR EVERY GAP

Each of the above tabs are repeated with the identifier "G1", "G2" up to "G7" to identify the seven Critical Factors and their associated gaps.

Analyze each Critical Factor in the same way.

Start with the Critical Factor with the highest weighted gap and work down to the Critical Factor with the smallest weighted gap.

You may decide only to determine projects for the Critical Factors with the highest weighted gaps and not plan anything for those with the smaller weighted gaps.

CONSOLIDATION (Consolidation)

The consolidation sheet pulls the data from each of the Critical Factor gap project lists into a single sheet.

This sheet can then be copied and pasted into a separate spreadsheet -- copy and paste everything and then paste again "Values" in order to prevent links to the individual sheets unless you specifically choose to maintain the links and are aware of the technical implications of maintaining live links.

These pages can then be combined into one page for all the SnapShots® and on this you can develop a comprehensive action plan.

The development of a action plan into full detail is not included in the scope of this software. James A Robertson and Associates offer a full range of consulting, advisory, facilitation and training services to assist you to develop the full action plan and then from that develop a comprehensive project plan which can then be implemented using standard project and programme management methods.

END PROCESS (End Proc)

End of the tool.

CHAPTER

6

CONCLUSION

The development of comprehensive strategic plans is outside the scope of this manual.

The results of the analyses produced by the effective use of the tool and method can be integrated into your business operations in whatever way seems appropriate.

The basic SnapShot and gap analysis process is demanding if done thoroughly. Provided it is tackled systematically by a small working team with a clear mandate and systematic consultation, it is achievable in an acceptable time frame.

Iterations WILL be required.

If you think that I could be of assistance to you in achieving your objectives please contact me.

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ABOUT JAMES A ROBERTSON AND ASSOCIATES

James A Robertson and Associates is a specialist International Management Consultancy.

JAR&A offer executive level strategic consulting services with regard to effective strategy development and implementation and strategic application of information technology.

JAR&A also offer specialist training courses and Executive Briefings relating to this software and method and with regard to effective strategic planning and effective application of Information Technology.

Our focus is primarily on short duration, high impact, high value, interventions.

More details can be obtained from our web site at:

<http://www.jar-a.com>

JAR&A can be contacted on email at james@jar-a.com

STRATSNAP[®]

Critical Issues Business Analysis Software

Well Established and Refined Tool and Method

The STRATSNAP[®] strategic SnapShot[®] critical issues business analysis tool and method have been developed over a period of fifteen years as a practical tool which is used by James A Robertson and Associates in providing services to clients.

The tool and method are applicable in fields as diverse as corporate strategy development, information technology strategy development, information system requirements analysis and general analysis of diverse collections of unstructured information.

They are applicable anywhere there is a requirement to bring focus and structure to a large amount of unstructured or unfocussed information or opinion.

Concise Facilitation Technique

The tool and method appropriately applied provide a concise facilitation technique with technology support that enables a group of people who collectively have knowledge and experience about any particular subject to work together quickly and effectively to develop robust structured understanding and prioritisation of that subject. The outcome is an intuitively sound, prioritised analysis.

The Software

Requires Microsoft Excel '97 or later to run.

Developed by:

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James A Robertson and Associates offer training courses on the use of the software and method and a full range of professional consulting and facilitation services. Visit our web site for more information.