

Strategy → finder

EVALUATION:
RATING AND PREFERENCING

by Prof Dr Colin Eden, Jan 2025

Strategyfinder
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Introduction to Evaluations: Rating and Preferencing

Rating and Preferencing features of *Strategyfinder* are used often in all of the methods. They are extremely valuable for evaluation of a range of statements. The process also provides good closure to stages of a workshop and for the end of a workshop. The feature can be used in many different ways.

The results of rating and preferencing show an indicative degree of consensus across the group. One of the objectives of much group work is to facilitate a gradual consensus without 'group think'.

The specific uses of rating and preferencing are presented in the appropriate manual. This brief manual provides more detailed instructions of the process of use.

Section 1: Using the Rating Feature

Purpose of Rating:

Allows Users/participants to rate any number of statements against a scale set by the facilitator/leader/SuperUser.

Most often used to rate the following:

Relative importance/ priority/ impact:

For example, at the end of a session (for example when taking a break) allowing the group to make a rough judgement about the relative importance of the topics/clusters they have created provides the group with a sense of achievement and an indication of the extent of consensus about which topics they judge to be most important

Relative progress against a target

Estimate of cost (see **Strategyfinder for Estimating using Delphi** manual)

Setting up and using the Rating Feature

Select the statements to be rated

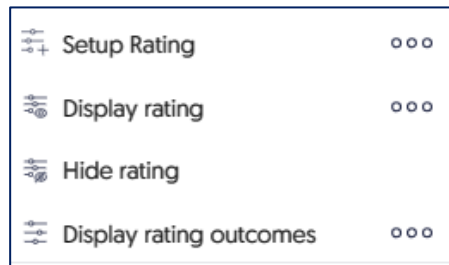
Click on a statement, hold down the shift or ctrl key, select all other statements to be rated

HINT: rating more than 10-12 statements can be difficult for participants

Go to the 'Evaluations' menu



Choose 'Setup Rating'.



For Relative importance/ priority/ impact use the simple 0-10 scale.

Instruct participants to establish those topics that they, for example, “regard as *most* important to address in the next workshop” and to set those at a rating of 10.

Then establish which they regard as the *least* important and set these at zero (noting that because they are set at zero does not imply that they are not important, rather they are simply the least important).

Instruct them to set at least one topic at zero and at least one at 10 – in order to establish ‘anchor points’.

All other topics should then be set somewhere between 0 and 10 to register relative importance.

For Relative progress against a target.

Often used in a progress/review workshop. Thus, reviewing progress against ‘Strategy’ category and/or progress against ‘Action’ category.

Typically, the scale now allows for a negative progress.

Thus, a scale from -3 to +10 (or -30 to +100) works well.

When there is a lack of consensus then a ‘Blind gather’ on a new view is used: asking for views on progress is variably evaluated.

Similarly, when progress is consensually agreed to be poor or negative use ‘Blind gather’ to gather views on why this might be the case – a form of problem solving.

For estimating costs.

Setup rating, having selected a statement such as: “estimate the costs of the xxx project”.

The scale should be set with respect to the maximum and minimum cost that will be presented by the expert group, plus 10%. Thus, if you judge the max estimate to be €70,000 then make a scale from the minimum to €80,000. Set the steps according to the degree of accuracy that is sensible. It is best to set the initial value at the most optimistic (lowest level).

For example, for a project cost range of €30k-€80k and intervals of €1k (high accuracy) the setting would use a 30-80 scale.

Using the Rating Settings:

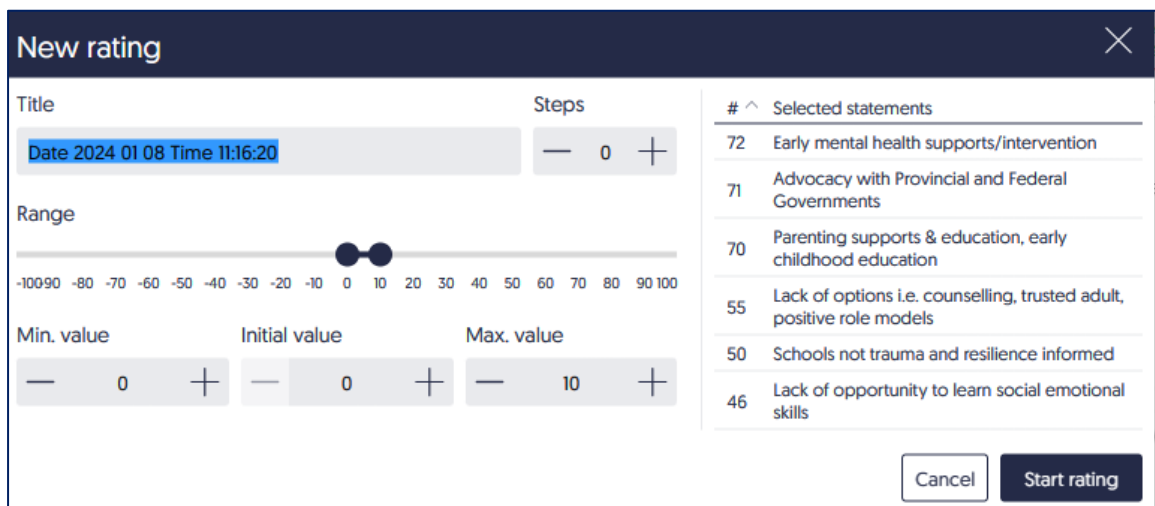
In the example below:

The title has not been set but is ready to be set

The rest of the settings are at the default

Note the selected statements are listed on the right (statements must be selected before the setting menu can appear)

Often the initial value is set to the mid-point (in this case at 5)



New rating [Close]

Title: Date 2024 01 08 Time 11:16:20 [Steps: 0]

Range: [Slider from -100 to 100, set from 0 to 10]

Min. value: 0 Initial value: 0 Max. value: 10

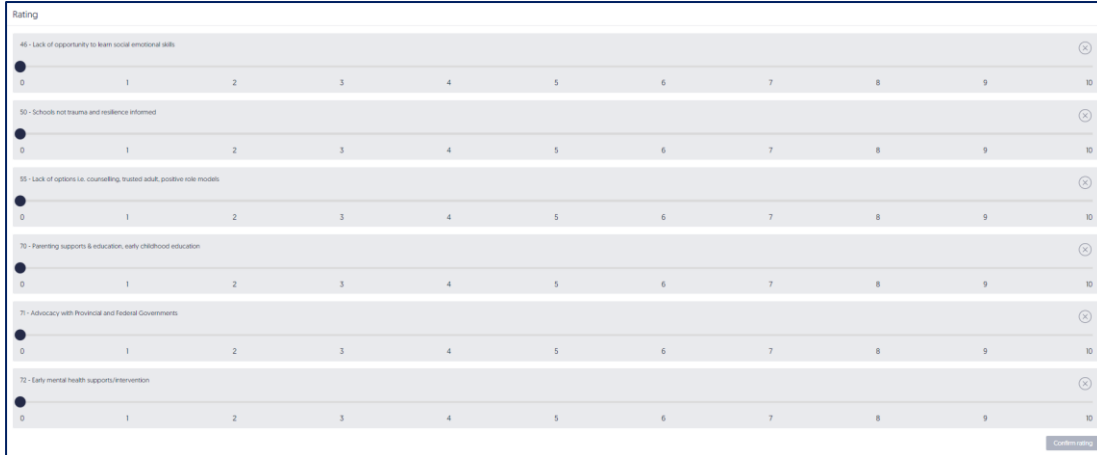
Selected statements:

- 72 Early mental health supports/intervention
- 71 Advocacy with Provincial and Federal Governments
- 70 Parenting supports & education, early childhood education
- 55 Lack of options i.e. counselling, trusted adult, positive role models
- 50 Schools not trauma and resilience informed
- 46 Lack of opportunity to learn social emotional skills

[Cancel] [Start rating]

Select 'Start rating'

In the example the screens of participants will now change to the below and blobs can be moved from the default setting. In order to register a rating at zero the blob MUST be moved from zero and returned to zero, in order to indicate that this is a deliberate evaluation. It can be useful to ask participants to use Ctrl/- to zoom the browser screen and see more of the statements.



Rating

46 - Lack of opportunity to learn social emotional skills

0 1 2 3 4 5 6 7 8 9 10

50 - Schools not trauma and resilience informed

0 1 2 3 4 5 6 7 8 9 10

55 - Lack of options i.e. counselling, trusted adult, positive role models

0 1 2 3 4 5 6 7 8 9 10

70 - Parenting supports & education, early childhood education

0 1 2 3 4 5 6 7 8 9 10

71 - Advocacy with Provincial and Federal Governments

0 1 2 3 4 5 6 7 8 9 10

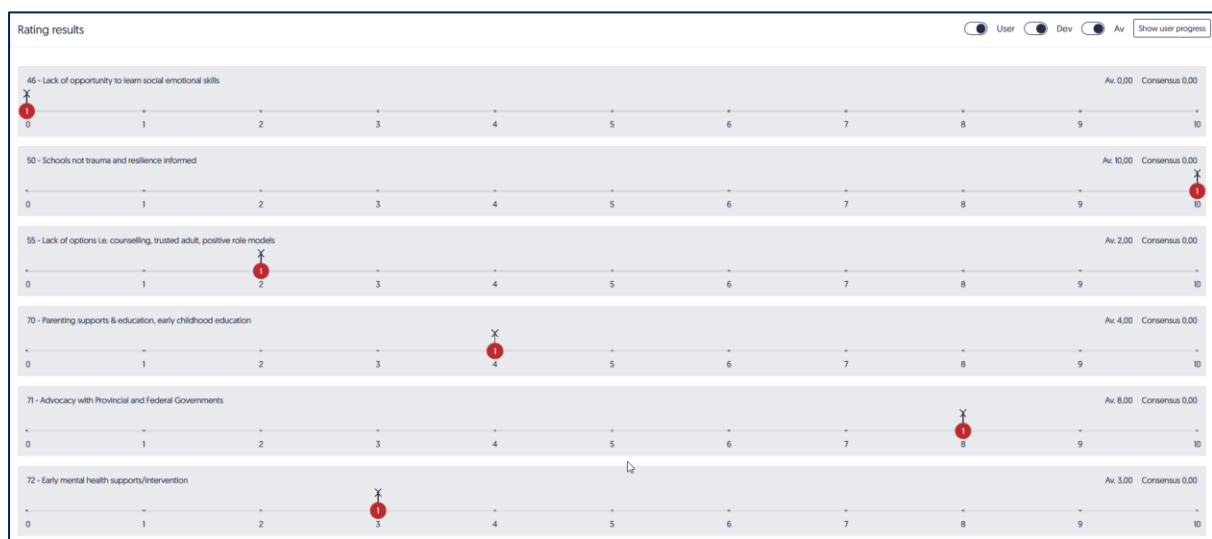
72 - Early mental health supports/intervention

0 1 2 3 4 5 6 7 8 9 10

Confirm rating

Facilitator notes:

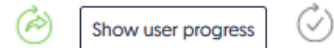
The facilitator sees the results screen. Results appear as they are submitted, by the participant clicking 'Confirm rating' (bottom right). Participants usually need reminding to do this!



Some participants may over-think their judgments and so take too long to set their ratings. When this happens then try and encourage fast and rough judgements – remind the group that this an attempt to gain a *quick and rough idea* of whether some topics are clearly regarded consensually as the most important. Provide a timing deadline: “can you submit your ratings in the next 2 minutes please”. It is often necessary to i) suggest they use their browser controls so that they can see more of the list on their screen (using ctrl with -), and ii) that they need to submit their ratings.

- i) The number shown inside a red blob shows the number of participants who have rated at that rating.

- ii) In the example below one participant has submitted. If Authorship has been set in the Settings menu then hovering over a red blob will show who submitted the rating.
- iii) Progress can be tracked using the 'Show user progress' at top left.



This will show the list of those logged on to the model and will show green on the 3 icons: those logged on, started rating, and when completed and confirmed.

After all participants have made their judgments close the rating and return to model using the 'door' icon top right




Display Rating results

From the 'Evaluations' menu, click on 'Display rating':





A list of the ratings that have been undertaken will appear at the left, with the most recent rating at the top of the list. From this list, click on the rating results to be displayed. The results will be shown on the map against each of the statements rated. The results show, for example:

R #4 Av: 8,00 Dev: 0,00 

This records that it is the 4th rating undertaken, the Average rating is 8.00, and the degree of consensus 0.00. The degree of consensus is calculated as the standard deviation divided by two (in order to keep the numerical result range reasonable – this is a relative guide to consensus only where the smaller the number then the higher the degree of consensus. In this example there is absolute consensus.

Using the 'bar chart' icon will display the detailed results.

When there is a coloured bar below the results this will give a quick indication of the degree of consensus (not show above because absolute consensus). For example:

R #3 Av: 8,70 Dev: 2,30  

Shows a higher degree of consensus (green) than:

R #3 Av: 4,40 Dev: 4,10  

Which is dominantly red.


Presenting the results of Rating

Use 'presentation mode'  to display results of Rating to participants.

Presentation mode is used when it is important that participants make no changes to the model. Thus, this mode 'freezes' the model except for the SuperUser (facilitator/leader).

Participants can see the display of the rating results as controlled by the SuperUser.

Remember to *close presentation mode when display is complete*. The icon turns red when turned on in order to act as a reminder.



When presentation mode is in use the icon changes to red as a reminder: 

Using share screen to display Rating results to participants

Beware that if sharing screen, then *participants may see authorship* as you hover over a statement (if 'Show Statement Author on hover' is on). Turn off 'Show Statement Author on hover' to avoid this outcome.

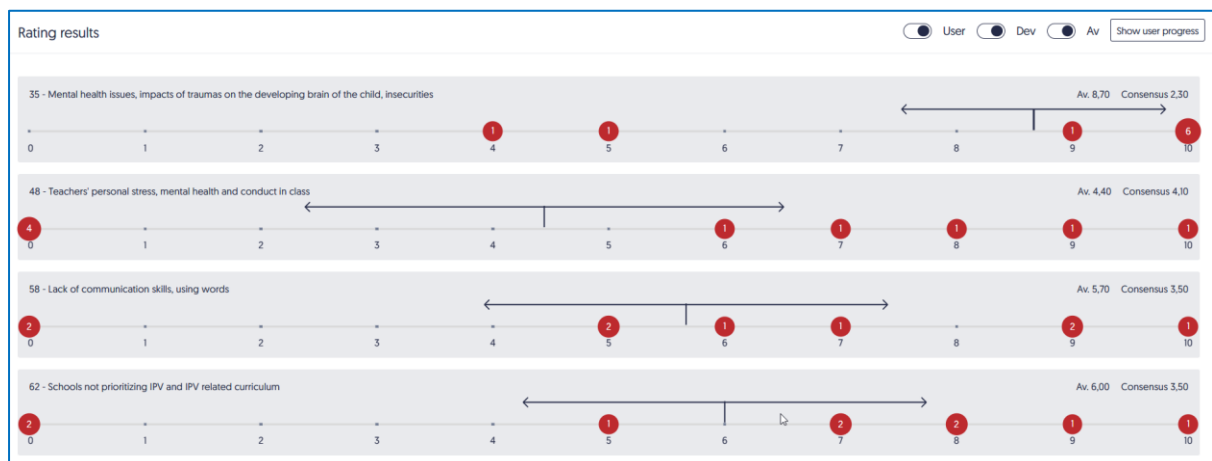
Remember to *close shared screen when display is complete*.

Using 'Display Rating Outcomes'

 Display rating outcomes 

Display Rating Outcomes is a way of recalling the results of a rating session as seen by the SuperUser. Thus recalling the full ratings details.

The Outcomes screen will then need to be 'Shared'.



This is useful for i) keeping an historical record of rating outcomes that can then be printed and enclosed in a report, or ii) recalling it during a workshop and using share screen to show the results in full (beware: if 'Show Statement Author on hover' is turned on then revealing author will occur).

Section 2: Using the Preferencing Feature

Purpose of Preferencing:

Preferencing allows participants to express a preference for a selected statement by allocating resources. As compared to rating, preferencing forces a choice on the understanding that there are restricted resources.

The resources are in the form of 'sticky blobs' of a variety of different colours. The sticky blobs are allocated to statements by moving them from a given stock of blobs, determined by the SuperUser/facilitator/leader, to a statement of choice. Blobs can be moved back to the stock or from one statement to another.

Typically preferencing is used to make an evaluation of a range of options. Participants are given two sets of resources they can allocate for i) the relative degree of impact (usually blue blobs) the option is judged to have on the key strategy to be addressed, and ii) the relative practicality (usually green blobs) of the option for the delivery of the strategy. In addition, often a third resource is available to enable anonymous expression of veto (red blobs).

Setting up and using the Preferencing Feature

Select the statements to be evaluated – usually those categorised as 'options' on a particular view that is focused on a particular strategy.

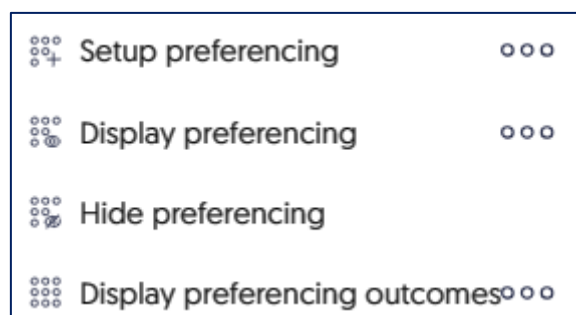
Click on a statement, hold down the shift or ctrl key, select all other statements to be rated

HINT: rating more than 10-12 statements can be difficult for participants

Go to the 'Evaluations' menu



Choose 'Setup Preferencing'.



Configure the preferencing:

The default settings are shown below

Configure preferencing
✕

Title

Date 2024 01 08 Time 01:29:53

Types [3]

Color	Description	Quantity	
■	green	— 3 +	<input checked="" type="checkbox"/> all must be set
■	blue	— 3 +	<input checked="" type="checkbox"/> all must be set
■	red	— 3 +	<input checked="" type="checkbox"/> all must be set

+ Add type

Cancel

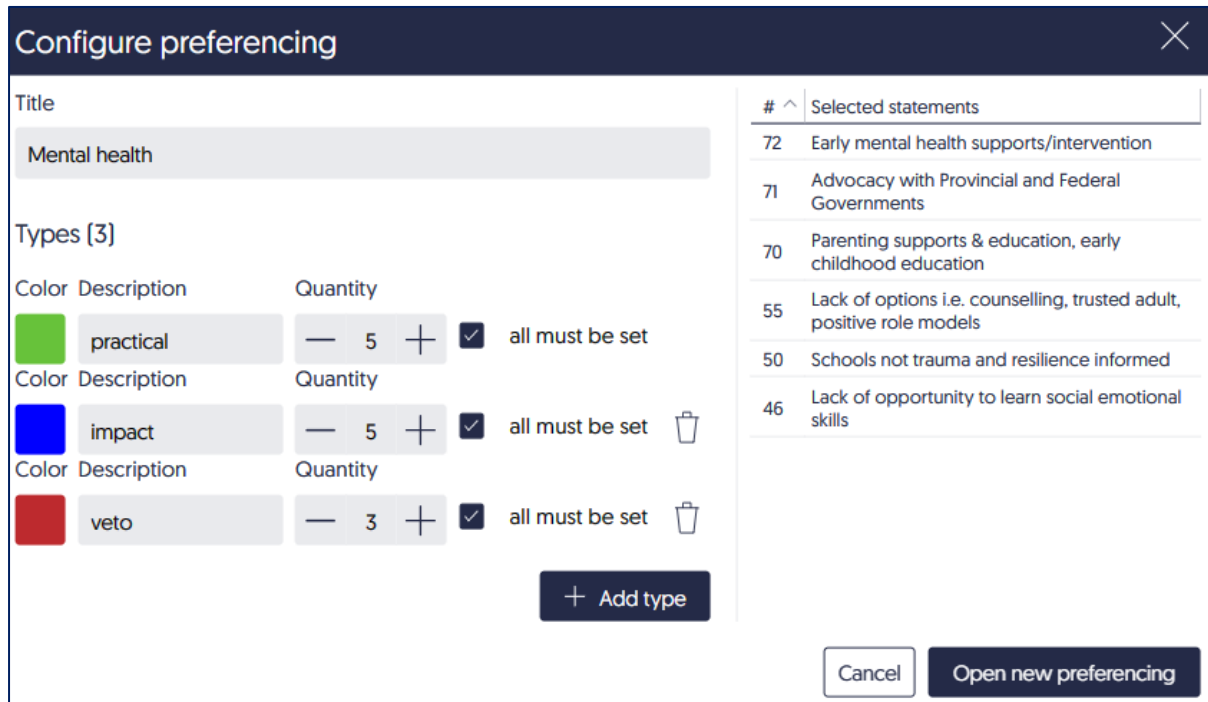
Open new preferencing

#	Selected statements
72	Early mental health supports/intervention
71	Advocacy with Provincial and Federal Governments
70	Parenting supports & education, early childhood education
55	Lack of options i.e. counselling, trusted adult, positive role models
50	Schools not trauma and resilience informed
46	Lack of opportunity to learn social emotional skills

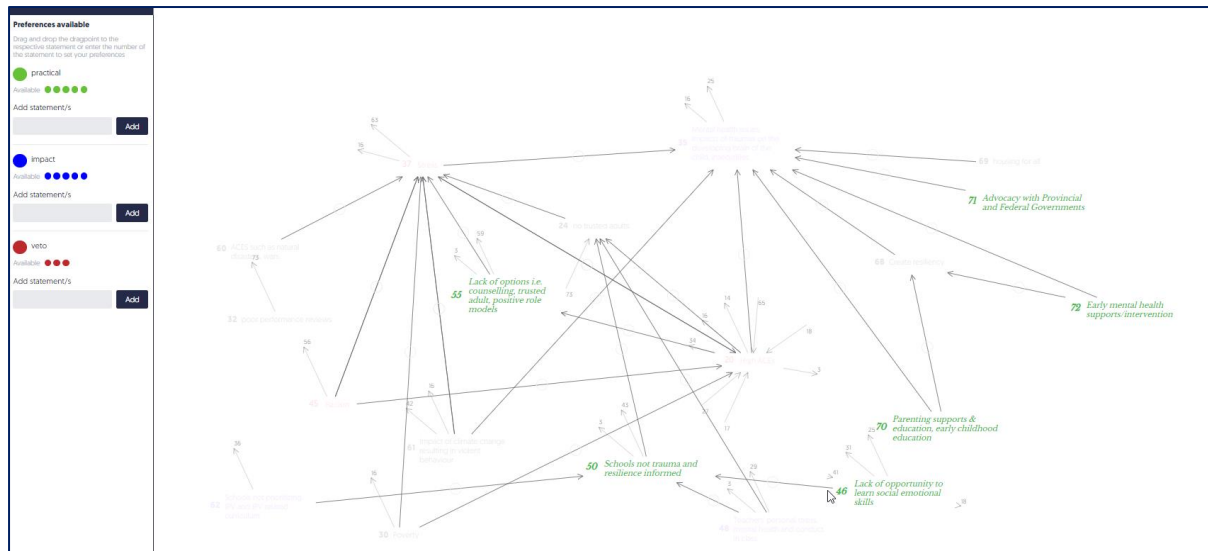
Set the following:

- i) Change the default title to reflect the nature of the preferencing.
- ii) Change the default colours if required. Click on the colour and a complete palette of colours will appear from which a colour of choice can be made.
- iii) Change the description of the colour from the default green/blue/red if required. Typically green will be used to indicate practicality, blue for impact, and red for veto.
- iv) Adjust the amount of resource. A good 'rule of thumb' is to allocate approximately two-thirds the number of resources as there are statements to evaluate. Thus in the example there are 10 options to be evaluated and so 7 blue and 7 green blobs will be given. If participants are working in pairs then ensure that an odd number of blobs are given, so that at least one blob must be allocated by agreement. For the veto evaluation it is usual to give 3 blobs.
- v) Finally determine whether all of the blobs for a colour must be set. For the veto (red) blobs this will be unticked, to allow for no vetos.
- vi) Note that additional colour blobs can be set, and the blue and red blobs removed (use the 'bin' to remove) if only one colour is to be used.

Thus, the final configuration for our example is:



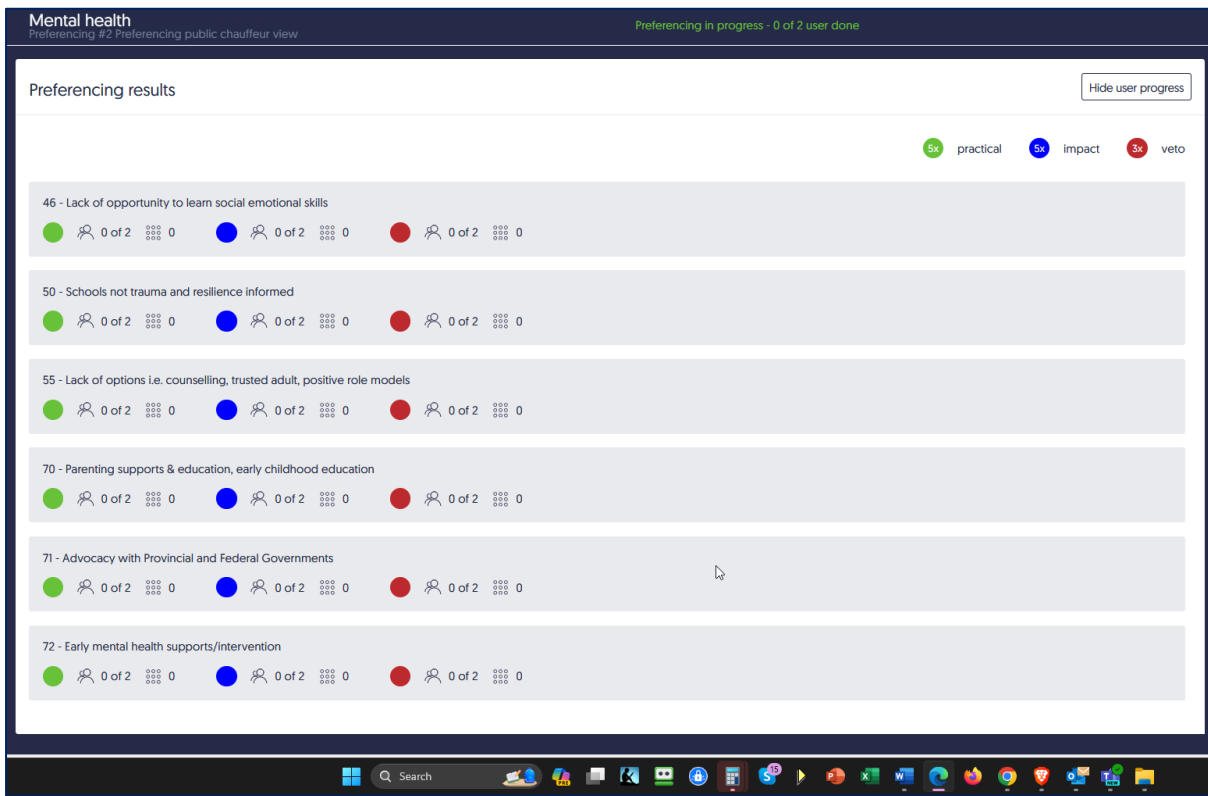
Start Preferencing, and the User screens will change to show the available blobs on the left and the statements that can receive blobs showing and all other statements greyed out. Users can place blobs on the preferred statements by moving a blob and dropping it on a statement, or alternatively specifying the statement number and 'Add'.



When participants have completed their preferences they MUST 'Confirm preferencing' at the bottom left.

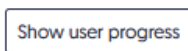
Facilitator notes:


The facilitator sees the results screen. Results appear as they are submitted, by the participant clicking ‘Confirm preferencing’ (bottom left). Participants usually need reminding to do this!



Some participants may over-think their judgments and so take too long to set their ratings. When this happens then try and encourage fast and rough judgements – remind the group that this an attempt to gain a *quick and rough idea*. Provide a timing deadline: “can you submit your final judgments about preferences in the next 3 minutes please”. It is often necessary to suggest they use their browser controls so that they can see more of the list on their screen (using ctrl/-).

Progress can be monitored using

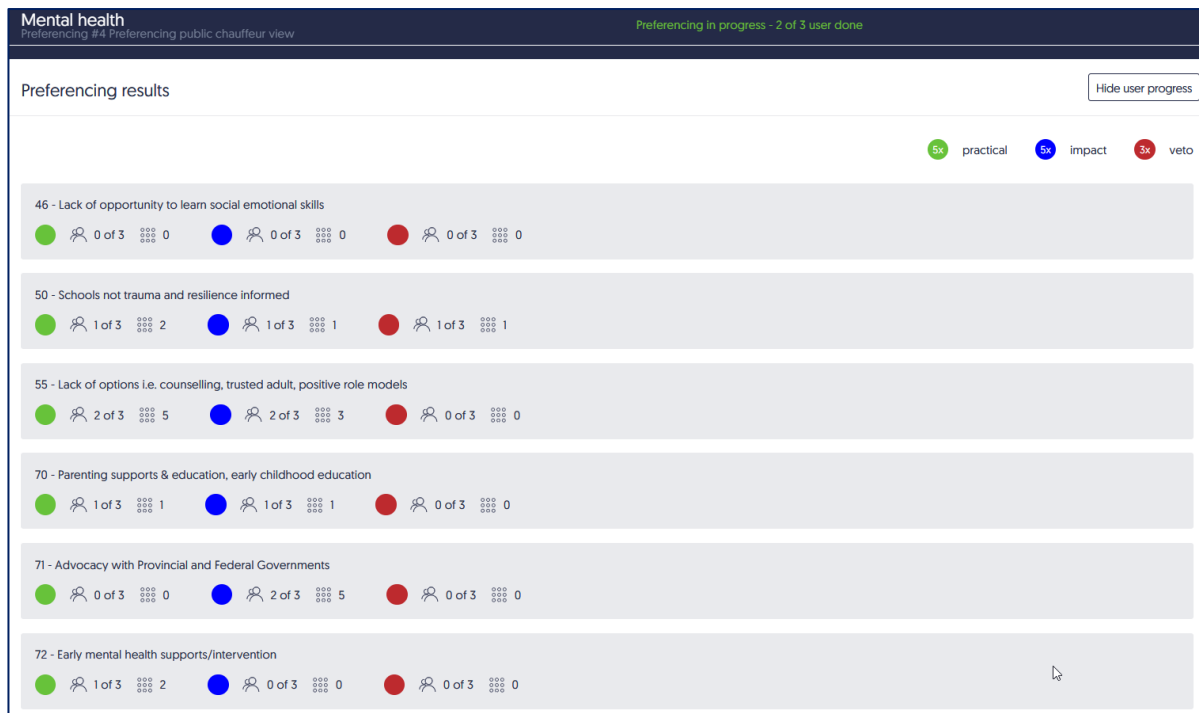


This will show the list of those logged on to the model and will show green on the 3 icons:  those logged on, started rating, and when completed and confirmed.

After all participants have made their judgments close the preferencing and return to model using the ‘door’ icon top right



Facilitator can see progress of preferencing on their screen:

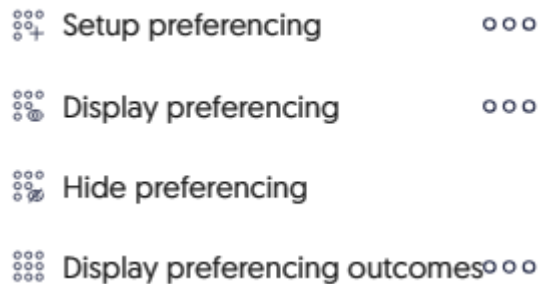


In the example we see that at this stage statement 55 has 5 practical blobs and 3 impact blobs, and that 2 out of 3 participants have contributed the 5 green blobs, and 2 out of 3 contributed the blue blobs. One participant still has to submit their preferences.

At this stage 1 participant has added a veto to statement 50, and this will probably need to be explored with group. The exploration will be undertaken without the person submitting the veto being asked to justify it, but rather all of the group asked to consider why there might be a veto on this statement – of course the person submitting it might want to make the case without being asked to do so.

Display Preferencing results

From the 'Evaluations' menu, click on 'Display preferencing':



A list of the preferencings that have been undertaken will appear at the left, with the most recent rating at the top of the list. From this list, click on the preferencing results to be displayed. The results will be shown on the map against each of the statements rated. The results show, for example:

P #4   

This records that it is the 4th preferencing undertaken, that 2 green blobs, 1 blue blob and 1 red blob were placed on this statement.

Presenting the results of Preferencing

Use 'presentation mode'  to display results of Preferencing results to participants.

Presentation mode is used when it is important that participants make no changes to the model. Thus, this mode 'freezes' the model except for the SuperUser (facilitator/leader).

Participants can see the display of the preferencing results as controlled by the SuperUser.

Remember to *close presentation mode when display is complete*. The icon turns red when turned on in order to act as a reminder.

When presentation mode is in use the icon changes to red as a reminder:



Using share screen to display Rating results to participants

Beware that if sharing screen, then *participants may see authorship* as you hover over a statement (if 'Show Statement Author on hover' is on). Turn off 'Show Statement Author on hover' to avoid this outcome.

Remember to *close shared screen when display is complete*.

Using 'Display Preferencing Outcomes'

Display preferencing outcomes

Display Preferencing Outcomes is a way of recalling the results of a preferencing session as seen by the SuperUser. Thus recalling the full details.

The Outcomes screen will then need to be 'Shared'. Note that it can be helpful to temporarily change the browser setting to zoom out and see more of the statements (using ctrl -).

This method is particularly useful if showing a measure of consensus is important

This is useful for i) keeping an historical record of preferencing outcomes that can then be printed and enclosed in a report, or ii) recalling it during a workshop and using share screen to show the results in full (beware: if 'Show Statement Author on hover' is turned on then revealing author will occur).

CATALOGUE

STRATEGYFINDER MANUALS AND GUIDES

MANAGING THE SOFTWARE PLATFORM

Strategyfinder CASE EXAMPLE - TEAM SOLUTION FINDING

ISBN 978-3-903556-15-7

Shows how a real 45min workshop unfolded to enable the group to develop a consensus around a portfolio of actions. Worth looking at before reading other manuals.

Strategyfinder - GETTING STARTED

ISBN 978-3-903556-01-0

This is the best manual *when using sf for the first time*. It takes you through a single user brainstorming session: including entering statements, linking them, using categories, and some simple but useful analyses.

Strategyfinder – THE BASICS

ISBN 978-3-903556-02-7

Introduces Strategyfinder: functionality, analytical capabilities, main strengths. Goes through what all the icons do: settings, entering statements and links; categorising statements; evaluations – rating and preferencing; analysis; managing views; archiving, synchronisation and export/import.

Strategyfinder –EVALUATION RATING AND PREFERENCING

ISBN 978-3-903556-06-5

An important and very useful feature of Strategyfinder is the ability use two different types of evaluations: rating and preferencing. These enable all participants to evaluate statements in a variety of ways and for the facilitator/leader to gain a sense of the degree of consensus within the group. This manual provides detail of how-to setup rating and preferencing evaluations.

Strategyfinder – GUIDE - GETTING STARTED: PARTICIPANT ACCESS

ISBN 978-3-903556-17-1

Describes the different ways of giving participants (and others) access to a Strategyfinder model.

Strategyfinder – ANALYSIS TOOLS

ISBN 978-3-903556-03-4

Introduces all the analysis tools available, with examples.

Strategyfinder – BACKGROUND THEORIES, RESEARCH AND CONCEPTS

ISBN 978-3-903556-00-3

Presents the background, research, and concepts to the development of Strategyfinder and the associated methods over the past 40 years. The methods have been in use in a wide range of organisations across the world for several decades and these experiences have provided an important research base for the development of the software and methods.

STRATEGYFINDER PRIMARY USES - METHODS**SYSTEMIC RISK MANAGEMENT**

Strategyfinder tool and method is the only known way of acknowledging risk as a system of interconnected risks. The method has been particularly successful in major project risk management and pandemic risk management, as well as many other messy risk situations.

Strategyfinder - METHOD - SYSTEMIC RISK ASSESSMENT AND MANAGEMENT SUMMARY

ISBN 978-3-903556-11-9

Capturing risks and showing causal links models a risk system. This manual shows, in summary, the process for constructing the model of the risk system and developing effective risk mitigation strategies and action programmes.

Strategyfinder - METHOD - SYSTEMIC RISK DETAIL

ISBN 978-3-903556-07-2

Shows, as a step-by-step guide, all stages of the process for constructing the model of the risk system, conducting appropriate analyses of the system, and developing effective risk mitigation strategies and action programmes.

STRATEGIC MANAGEMENT

These set of manuals show different aspects strategy making. Each method can be used independently of others, however together they work a portfolio of highly important parts of strategic thinking and strategic management.

Strategyfinder – METHOD - TEAM STRATEGY FINDING SUMMARY

ISBN 978-3-903556-10-2

Strategic management needs to be practical and capable of implementation. Thus, it must address the key issues the organisation faces in creating strategic success. This method has been used extensively by top management teams in many countries and many industries in public/not-for-profit organisations as well private/for-profit companies. It is based on a series of 4 half day workshops with the members of the management team connected to Strategyfinder from the own chosen location.

Strategyfinder – METHOD - TEAM STRATEGY FINDING DETAIL

ISBN 978-3-903556-09-6

Shows, as a step-by-step guide, all stages of the process for strategy development and the creation of agreed strategies and action programmes.

Strategyfinder – METHOD - DISCOVERING AND EXPLOITING COMPETITIVE ADVANTAGE

ISBN 978-3-903556-12-6

Competitive advantage is known to follow from exploiting distinctiveness, and distinctiveness comes from understanding and exploring the network of distinctive competences and distinctive assets. This method shows how to discover and explore distinctiveness and so develop effective strategies to exploit and develop competitive advantage. The method has been used not only in the commercial sector but also the public sector (including police forces, health service, etc).

Strategyfinder – METHOD - STAKEHOLDER MANAGEMENT

ISBN 978-3-903556-08-9

A crucial part of any effective strategy or problem solution is understanding the responses of key stakeholders and developing strategies to manage them. Stakeholders are often a social and influence networks with various levels of power and interest in managing their own responses to your strategies and solutions. This method uniquely helps develop effective stakeholder management.

There are also brief manuals available for using Strategyfinder to help manage strategy delivery and monitor progress, and also some effective ways of presenting an agreed Strategyfinder strategy. In addition, organisations often favour starting strategy making with a SWOT analysis – Strategyfinder is very effective at moving a SWOT analysis to strategy development. These guides/documents are available on request.

TEAM SOLUTION FINDING – MANAGING MESSY AND COMPLEX PROBLEMS**Strategyfinder – METHOD - TEAM SOLUTION FINDING**

ISBN 978-3-903556-13-3

Many, if not most, organisational problems are a system of interacting issues that have soft as well as mathematical relationships. This method enables the ‘owners’ of the problem, as well as possible experts able to help suggest solutions, to get together to understand the systemic nature of the problem and so develop an effective and practical solution. Significantly the participants need not be in the same location and are able to bring together a team perspective and to co-create a jointly owned systems view. With this method and Strategyfinder there deliberations can be fast and highly productive (see the example real case: ‘Strategyfinder – a real case example of team solution finding in 45min).

The Strategyfinder 10min video shows how a manager was able to get the views of his team, without the need for a meeting, prior to attending an important meeting (see YouTube “Strategyfinder Briefing Workshop@).

When analysts address problems by constructing mathematical models or simulation models it is crucial they understand the nature of the problem as seen by those who will have the responsibility to implement any solution. This method enables analysts to undertake fast problem construction with the client group. (24pp)

The manual assumes familiarity with Strategyfinder – the getting started manuals.

OTHER TRIED AND TESTED USES FOR STRATEGYFINDER

Strategyfinder – REVERSE ENGINEERING TEXT INTO A STRATEGY MAP

ISBN 978-3-903556-23-2

Reverse engineering a published mission statement/strategy statement can provide a good to revisiting strategy development. It can also 'test' a mission/vision statement for thoroughness and logic. This method helps gain clarity in understanding a report/documents(s). The manual illustrates the process using a published mission statement and provides a set of 'rules' for reverse engineering.

Strategyfinder – ESTIMATION USING AN ADAPTED DELPHI TECHNIQUE

ISBN 978-3-903556-14-0

A range of experts in the estimating topic produce independent estimates of the likely cost of a new and probably complex project (using the rating facility in Strategyfinder), they then explain the key factors that impacted their estimate (using the 'blind gather' facility in Strategyfinder), everyone now re-estimates in the light of knowing these factors, and the process is repeated until the range of the estimates gets smaller and the average and median moves to what can then be regarded as the best estimate. An important outcome is a range of possible risk factors and factors crucial when undertaking the traditional estimating.

Strategyfinder – METHOD - BRAINSTORMING ISBN 978-3-903556-04-1

Brainstorming can easily be done using 'sticky-labels' on a wall, however using Strategyfinder can offer benefits of i) anonymity and so opening up possible ideas that would not surface otherwise, ii) show causal, or other, connections between ideas, and so iii) analyse the structure the inter-related ideas, iv) use categories to help see different characteristics of ideas, v) undertake anonymous evaluations of the ideas against a variety of criteria. This manual describes a simple process for doing brainstorming.

Focus Groups

The Team Solution Finding and Team Strategy Finding methods each provide a basis for fast and highly effective focus group work. With Strategyfinder, participants in the focus group can be located anywhere with an internet connection. The early stages of these methods offer little more than other 'whiteboard' software. However, Strategyfinder allows for causally connecting statements from participants, and most importantly both during and after a focus group workshop the material can be analysed in a variety of ways.

In addition, the methods allow for the focus group to go beyond expressing view and the linkages. The group can be facilitated to providing their own agreed solutions.

FACILITATOR GUIDES

Strategyfinder – GUIDE - MULTI-ORGANISATION COLLABORATION GUIDE

ISBN 978-3-903556-16-4

Based on extensive experience, the guide introduces a range of issues to pay attention to if using Strategyfinder for Multi-Organisation Collaboration when faced with messy problems, or the need to construct a joint strategy, when an input from a collaborative multi-organisation group is required.

The Strategyfinder Team Solution Finding and Team Strategy Finding methods are particularly effective for addressing 'Grand Challenges' and 'Future Shocks'. These require commitment from many organisations agreeing to work together. Many features of Strategyfinder methods help: high group productivity, anonymity when appropriate, able to explore degree of consensus on potential agreements, and participants can join from their own organisational location.

Eden, C., Paulsen, S., Gonzalez, J. 2024. Breaking the Cycle in Norway. In Resilience in Action. IBM Institute for Business Value (accessible from IBM web site) provides a brief summary of multi-organisational collaboration in Norway. And, Ackermann, F. 2024. Managing grand challenges: Extending the scope of problem structuring methods and behavioural operational research European Journal of Operational Research 319, (2), 373-383 discusses some of the issues.

Strategyfinder - GUIDE - IDENTIFY AN OPTIMUM GROUP OF PARTICIPANTS

ISBN 978-3-903556-05-8

Getting together an optimum group of participants is important for all strategy, risk, solution finding workshops. Ensuring both an adequate range of expertise is represented and crucial power-brokers (implementers) are present is crucial. This guide uses Strategyfinder to help with the identification of the best group of participants and helps with getting the group size to a reasonable level.

Strategyfinder – GUIDE - FACILITATION NOTES

ISBN 978-3-903556-22-5

This guide provides a set of notes about the role of a facilitator/leader/manager when using Strategyfinder. A workshop checklist is provided. The guide also includes suggested further reading.

THE STRATEGYFINDER WEBSITE

<https://www.Strategyfinder.com>

The web site provides a variety of video support.

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