

Strategy finder

GUIDE
GETTING STARTED

by Prof Dr Colin Eden, Jan 2025

Strategyfinder
Consulting Software GmbH
FN 623983y, ATU80524309
Muenichreiterstrasse 25
A-1130 Vienna Austria

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Author Copyright © Colin Eden

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Getting Started with Using *Strategyfinder*

This document provides a quick way of getting to know *Strategyfinder* as a 'single user' (no other participants).

You may have just been supplied with access to *Strategyfinder*: either as a purchaser or as someone with access to *Strategyfinder* belonging to someone else. In either case you will have been given access through a given email address and password. You will have been given access either as an Administrator or as a SuperUser (if you have been given access as a User – participant – then ask for the access to be changed to SuperUser so that you have access to all of the features of *Strategyfinder*). You may wish to use this guide by completing only the first 3 steps. Note that there is also a *Strategyfinder* – the Basics manual without a use example that will be helpful.

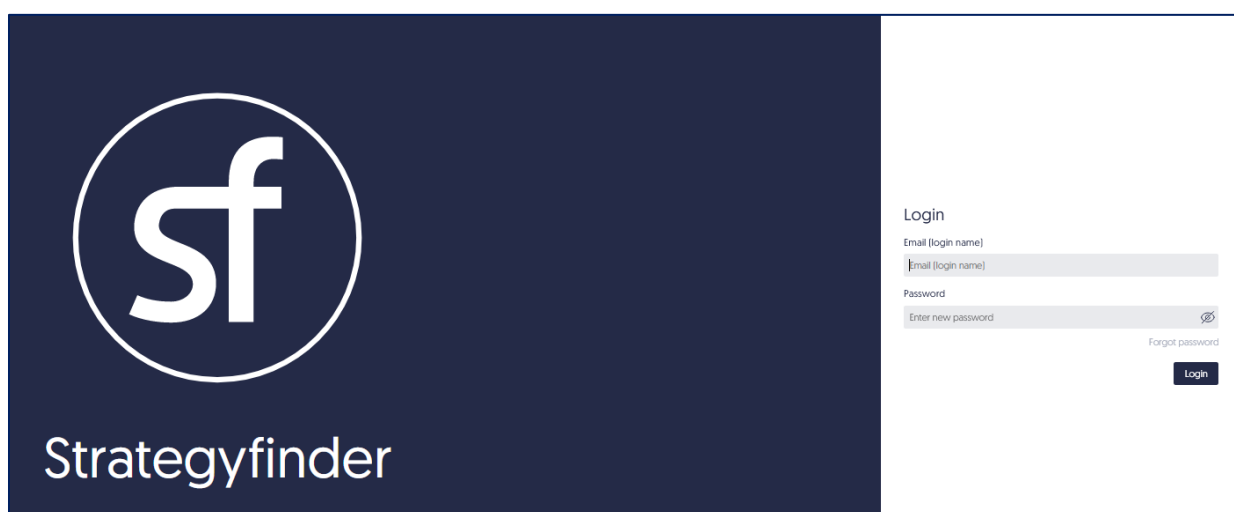
Step 1: Log on to Strategyfinder

It is better, if possible, to use a computer that is connected to a monitor (preferably greater than 21"). This is not essential but does allow you to see more material on the screen without having to Zoom or Pan.

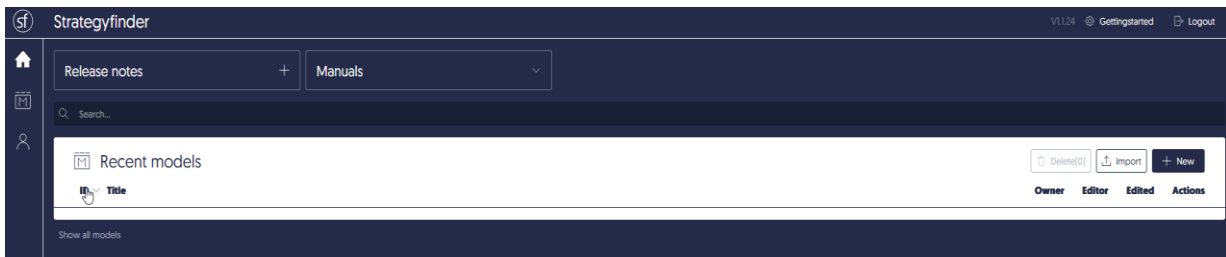
Open any web browser.

Access: YOURNAME.*Strategyfinder*.com where "YOURNAME" is the name of the *Strategyfinder* server you have been given access to.

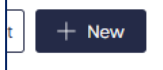
The login page will appear:



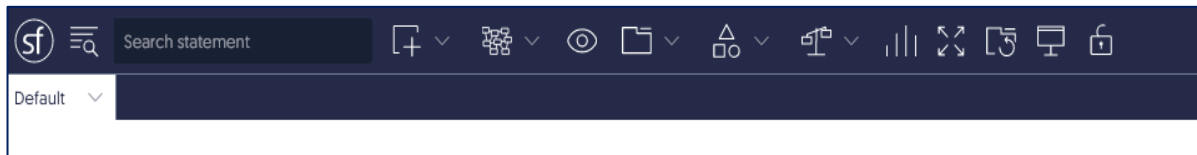
Enter the Email address and Password you have been given and click on Login:



Step 2: Create a new Model

Click on 'New' 

The following appears: the main 'icons'/menus that you will use, and a blank 'white board'

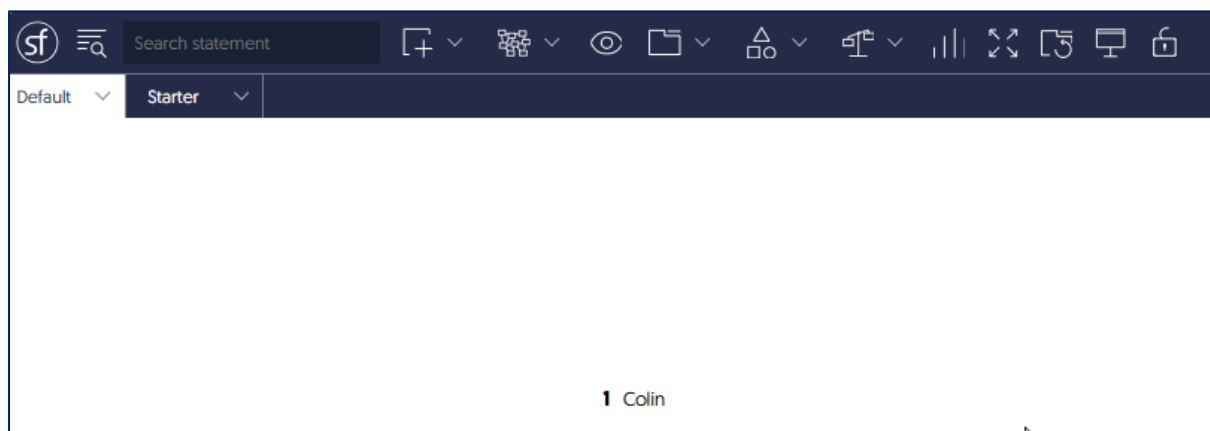


The blank 'view' has a tab name of 'Default'. As your experiment bin getting started continues you will create new tabs/views to show different aspects of the model you create.

Entering a statement

The default tab/view is usually used for participants to enter their name in order to show they are fully logged on to *Strategyfinder*. In your case you are the only participant, so add your name to the view by 'double clicking' anywhere on the white space, typing your name, and hitting the 'enter' key.

Your name will now appear on your screen (if there were other participants then their name would also appear on this 'default' view). Your name will have the number "1" against it. This is simply a reference number.



Moving a statement

Click on the statement, hold the mouse click down and move the statement.

Editing a statement

Double click on the statement. Edit the statement (note that a spell checker works) and then hit 'enter'.

Step 3: Try some simple brainstorming¹

Choose a topic, for example: “what do I want from my next vacation?”

The topic may, of course, relate to a work problem you are trying address, or to a personal situation (as in the example). But, bear in mind that this document is about ‘getting started’ and so the topic need not be a real situation, but should be one where there is some degree of complexity, so that different features of *Strategyfinder* can be experienced.

Create a new tab/view

Click on the ‘+’ at the top right, just under the back icon

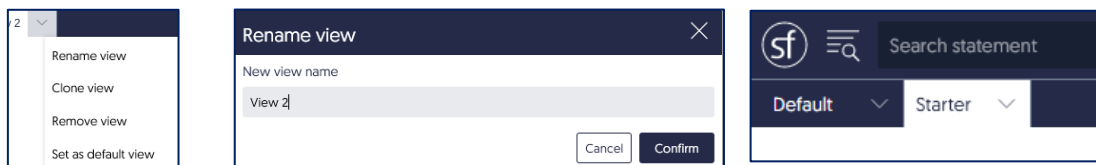


A new view will appear and it will be called “View 2”.

Rename the ‘new view’ called View 2.

Click the drop down chevron next to “View 2” label:

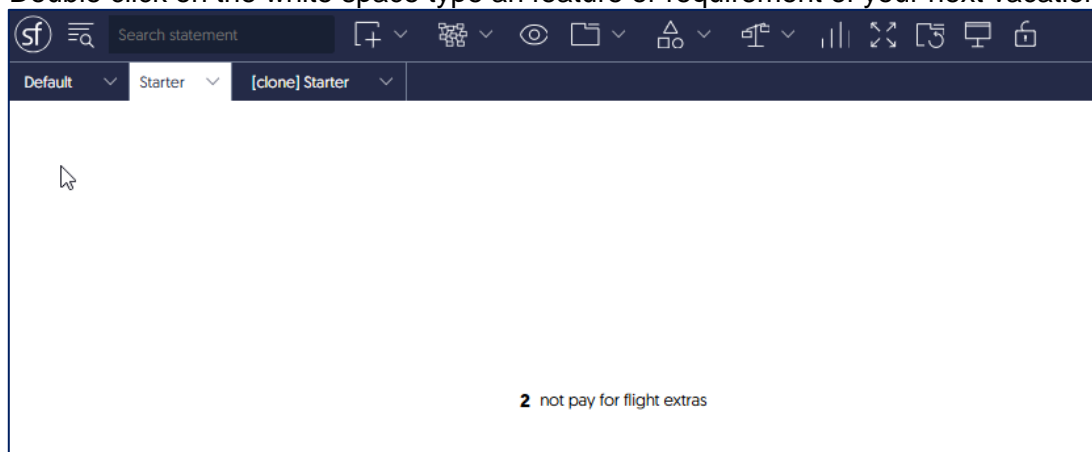
Click on ‘Rename view’.



And type a new name for the view, for example “Starter”

Brainstorm the topic: what do I want from my next vacation?

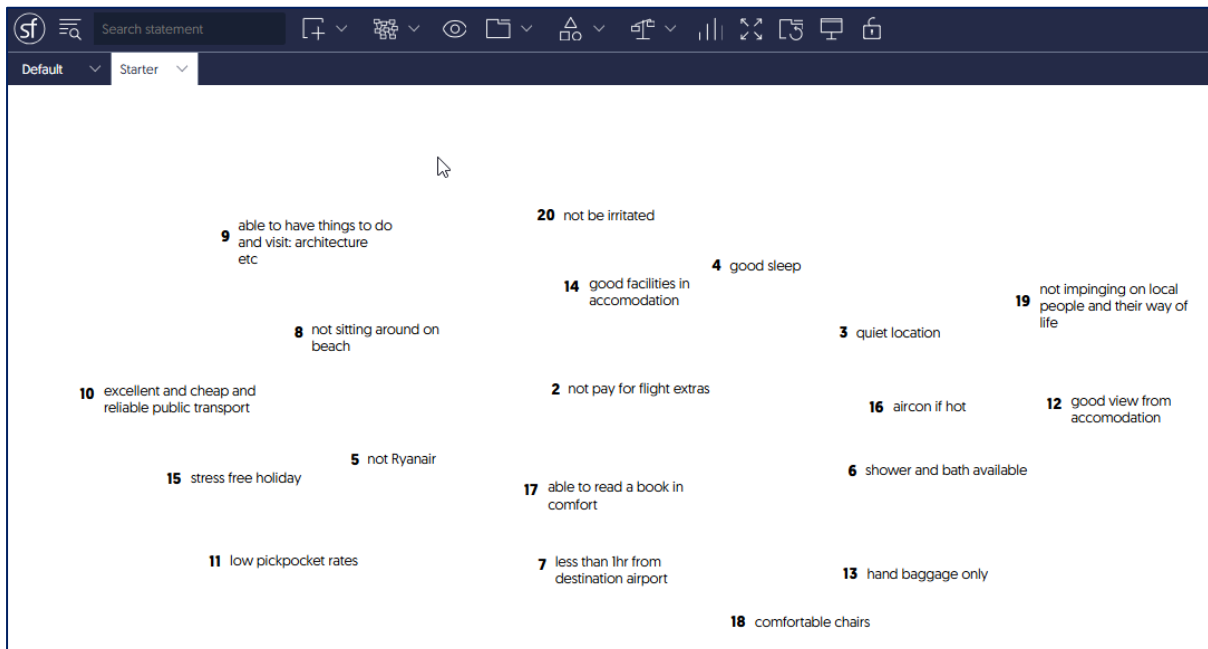
Double click on the white space type an feature or requirement of your next vacation.



¹ There is a *Strategyfinder* manual available that provides full details of running a Brainstorming workshop with multiple participants -

For example, the first feature stated here is “not pay for flight extras” and it will automatically be given the next reference number: “2”.

Continue to add statements:



19 statements have been added to the “Starter” view. They have been scattered around the ‘white board’.

Zooming and Panning

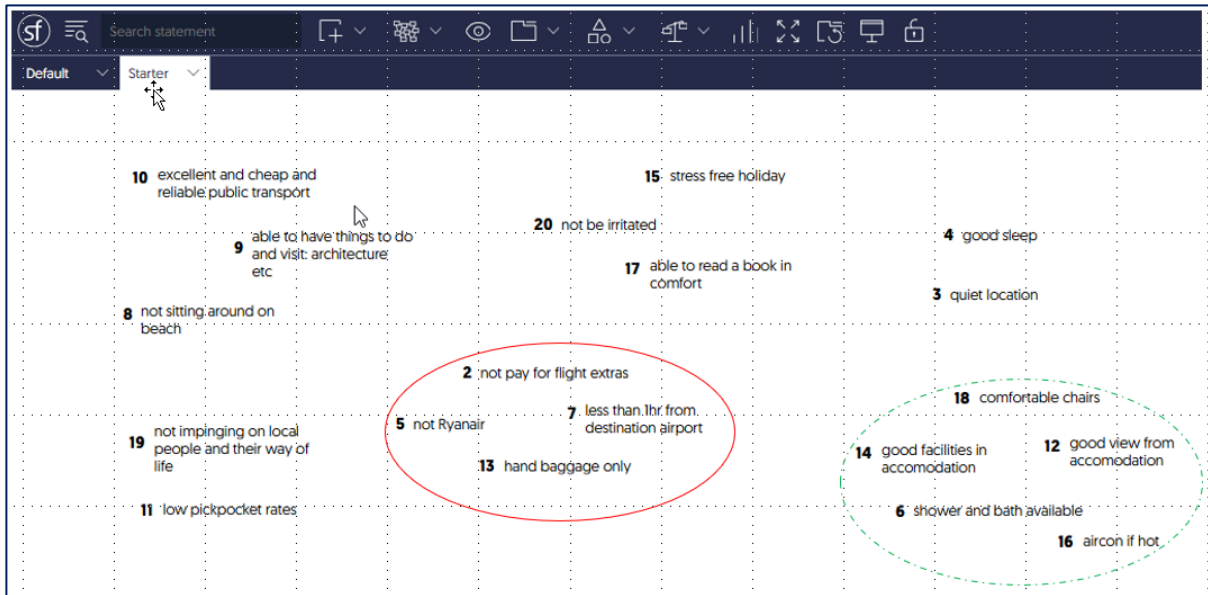
Sometimes there may not be enough space to add all the statement required. In this case the material can be zoomed – where the statement each become smaller and so leave more space on the view. To zoom in or out simply use the scroll on the mouse.

If statements are now so small they are difficult to read then zoom in to make them larger and then ‘pan’ the material in order to see a part of the material. Pan by holding down the right click and moving the material.

Thematic/Topic clusters

They could be moved around the view into clusters representing themes or topics. This is not an essential process. Sometimes clustering can be helpful in providing an initial summary view².

² When using *Strategyfinder* for multi-participant workshops such as Solution Finding, Strategy Finding, Systemic Risk Mitigation etc the manual suggests clustering as an important way to engage the group with an initial ‘gathering’ if statements from the participants – see *Strategyfinder* manuals for full detail of this process.



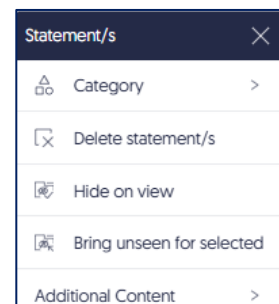
In the example we can see that the statements have been moved to create 6 clusters. For example, the cluster with a solid oval (red) is about flying, and the dashed (green) oval is about accommodation.

Using Categories: Providing a topic title for the clusters

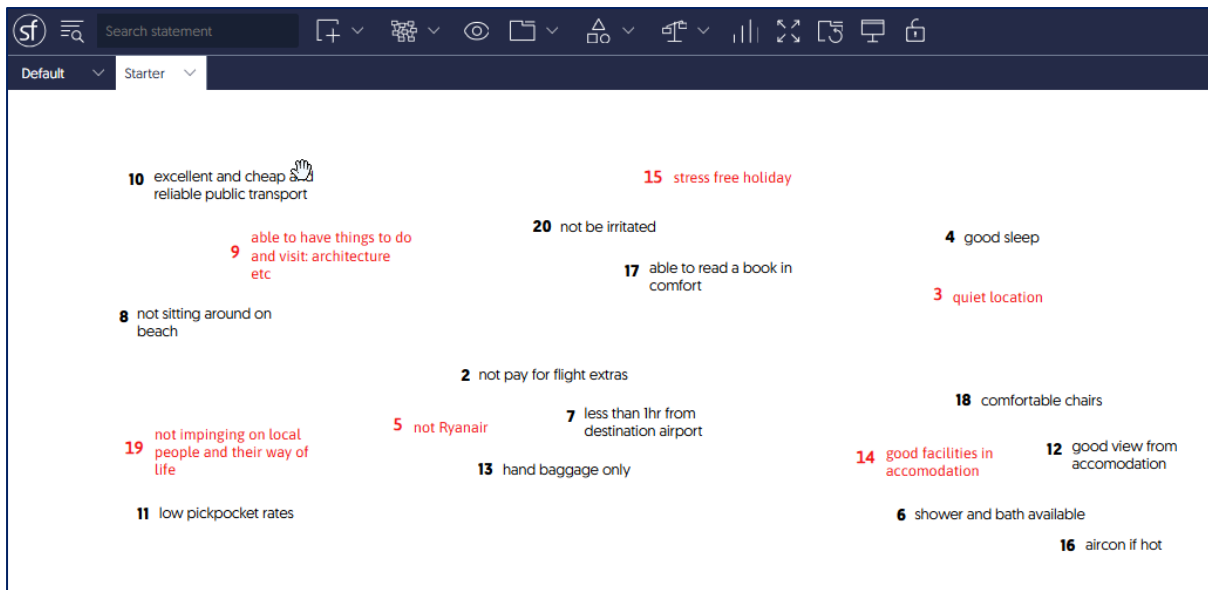
It can be helpful to provide a ‘tag’ for each cluster, that can act as a reminder of the cluster topic. This is particularly useful when there are a large number of clusters.

For each cluster choose one of the statements that best describes the topic of the cluster:


- i) select these statements by holding down the shift or ctrl key and clicking on each statement in turn.
- ii) right click one of the statements and a selection box appears:




Choose ‘Category’ and a new selection box is added showing a range of 5 default categories: GOALS, STRATEGY, ACTION, Option, FOCUS. Click on ‘FOCUS’ and the selected statements will change to red. Thus, the topics are now shown in red, with one topic for each cluster:




Listing and editing from a list

Use the Show/Hide statement list icon at the top left 

This will list all the statements.

Statements not on the tab/view will have  against them.

This icon can be clicked to bring the statement on to the tab/view.















Clicking on  allows the statement to be edited from the list.

Edits will mean the statement is changed throughout the model: on all views and all lists

Clicking the funnel icon allows the list to be made for each of the Categories in use. For example, click on FOCUS (which is shown to have 6 statements in the list) and the list will be modified to show only those statements.

Similarly, the buttons can show a list of statements on the current view or deleted statements:

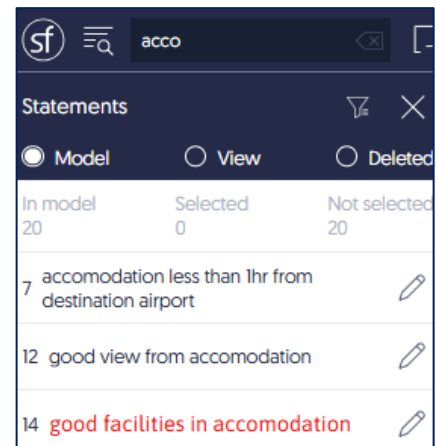


Statements		
<input checked="" type="radio"/> Model	<input type="radio"/> View	<input type="radio"/> Deleted
In model	Selected	Not selected
20	0	20
1 Colin		 
2 not pay for flight extras		
3 quiet location		 
4 good sleep		
5 not Ryanair		
6 shower and bath available		
7 less than 1hr from destination airport		
8 not sitting around on beach		
9 able to have things to do and visit: architecture etc		
10 excellent and cheap and reliable public transport		
11 low pickpocket rates		
12 good view from accomodation		

Searching for statements

Use the Search facility at the top left. A search can be conducted on any text, including numbers.

Here the search was to find all statements about accommodation:



The brainstorm might be complete at this stage and often is when working with a group. That is the manager/leader may now have enough ideas to work with³.

Step 4: Develop the Structure of the 'brainstorm'

The material/statements are usually not independent of each other. One statement may have a causal impact on another. For example, #10 *excellent and cheap and reliable public transport* may be believed to have a positive impact on #15 *stress free holiday*.

Linking

Adding a link (arrow) FROM #10 to #15 will show this dependence. The statement at the head of the arrow will usually represent the outcome (usually the outcome that is desired of the 2 statements). In the example the desired outcome is a stress-free holiday and public transport contributes to this outcome – it is one, of possibly many, 'causes'.

To add a link/arrow:

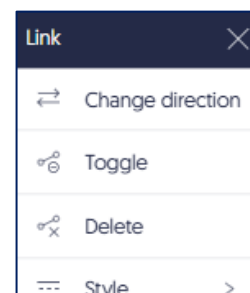
hover over the statement number of the statement to be at the 'tail' of the arrow and a 'cross' appears;

hold the mouse left button down and move the cursor;

an arrow will appear;

with the cursor move the arrowhead to cover the statement

to which the arrow is to go; release the mouse button.



³ See the *Strategyfinder – Brainstorming manual*

Changing links

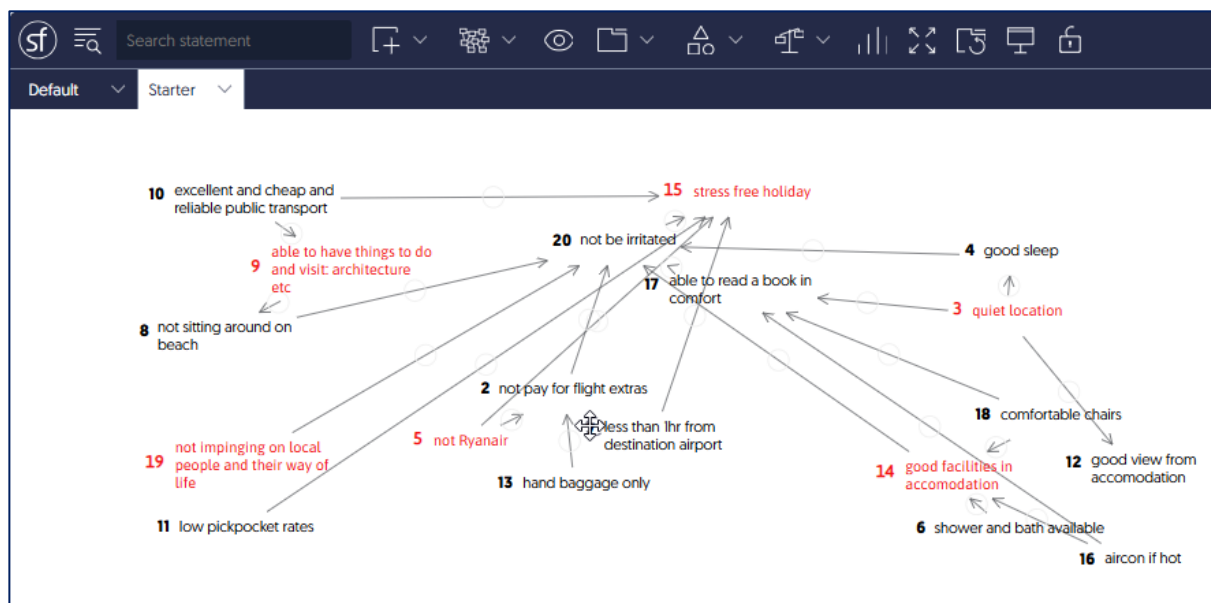
Right click on the arrow:

'Toggle' allows a minus-sign to show on the arrow indicating that the statement at the tail of the arrow has a negative impact on the statement at the head of the arrow. Thus:



The above would mean that excellent public transport would lead to 'not' stress free holiday.

'Style' enables the use of dashed or dotted arrows, highlighted (red) arrows, and a return to the default arrow.



The above figure shows one possible vicious cycle related to vaccination – the arrows represent the direction of causality.

Re-organise layout to show structure

Having linked the statements it can be very helpful to see the network – causal map – laid out as a hierarchy, with outcomes at the top and influences at the bottom.

However, it is often useful to retain the 'messy' structure for future reference to the initial 'starter' view.

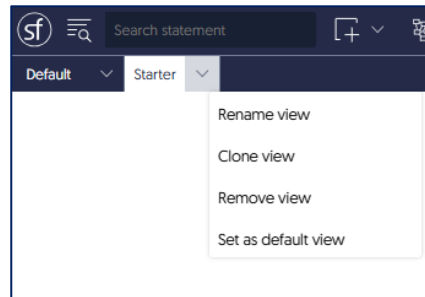
There are 2 obvious ways of re-organising the causal map:

- i) use the 'clone view and re-arrange' option. This will create a new view/tab and re-organise the current tab into a hierarchy.

ii) make a clone of the view and manually re-arrange. This way can be helpful because it can act as a review of statements and links, and often leads the addition of other ideas.

RECALL that any changes in links and edits of statements will be reflected in all views and lists.

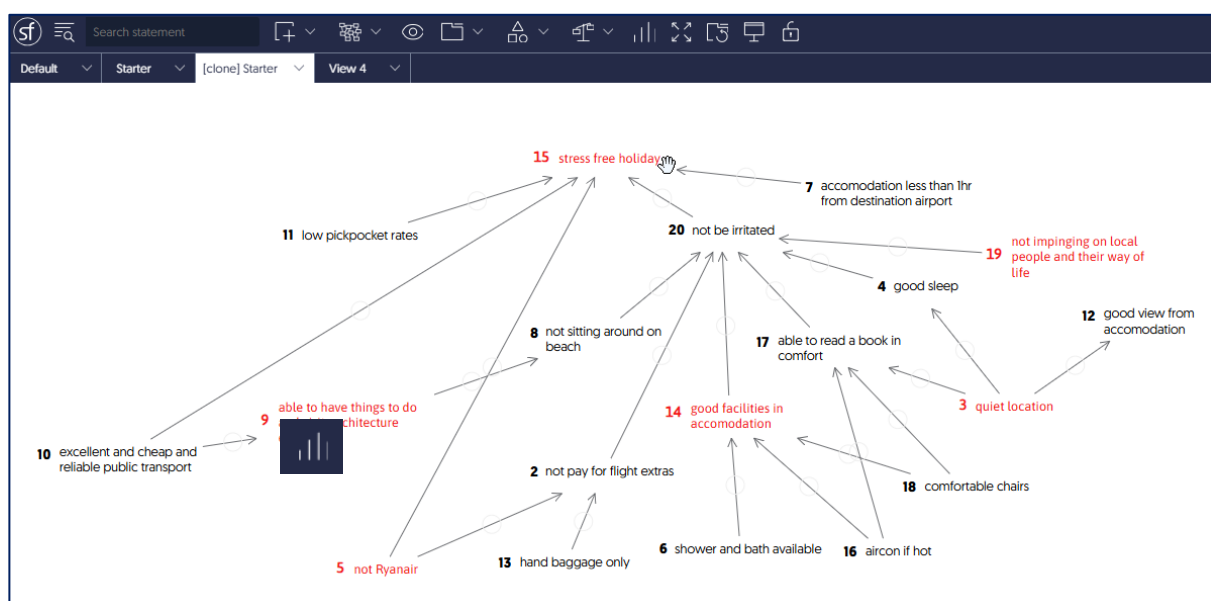
Use the tab/view drop down menu:



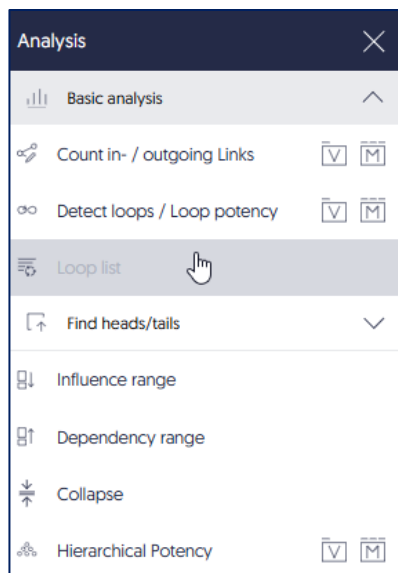
Select 'Clone view' and *Strategyfinder* creates a copy of the view in a new tab/view:





The causal map can now be manually re-organised to create a hierarchy without disturbing the layout of the 'Starter' view – although as edits and changes in links are made they will be reflected in all views and lists.



⁴ A full description can be found in *Strategyfinder - Analysis Manual*



Many of the analyses shown can undertake the analysis on the current view/tab or on the whole model: choose either of   .

The most often used analyses are at the top of the list.

Count in- /outgoing links

produces a list where the tabs provide a count of number of Outgoings, Ingoings, or both Ins/Outs.

For the example brainstorm the following results appear when requested for the whole



The analysis of Ins/Outs often gives an indication of central statements that if deleted then the model would change significantly. In the statistics above we see that #7 is central to the causal map, with 7 links to/from it, which possibly indicates a key-criteria for the holiday!

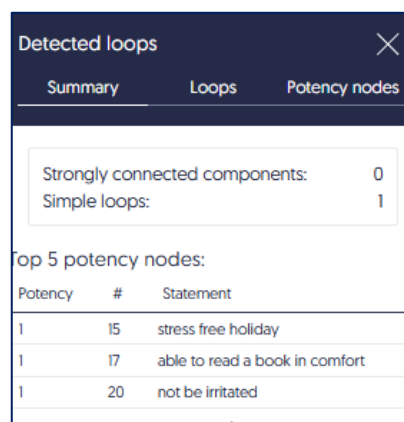
Detect loops / Loop potency

Often causal maps reveal vicious and virtuous cycles that are likely to be very significant for finding effective solutions to problems or developing sound strategies. This option finds and feedback loops shown in the causal map.

Often the loops discovered prove to be erroneous and the result of incorrect linking.

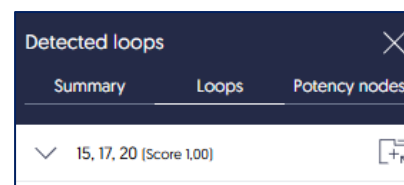
However, the analysis enables a new view to be automatically created showing a loop so that it can be validated.

Our brainstorm model has no loops. However, let us suppose that we believe that a stress-free holiday will facilitate reading a book in comfort (a plausible belief!) then there would be a link from #15 to #17. Adding this link to the model and then using the Detect loops analysis will show:




Detected loops		
Summary		
Strongly connected components:		0
Simple loops:		1
Top 5 potency nodes:		
Potency	#	Statement
1	15	stress free holiday
1	17	able to read a book in comfort
1	20	not be irritated

Clicking on the 'Loops' tab shows:



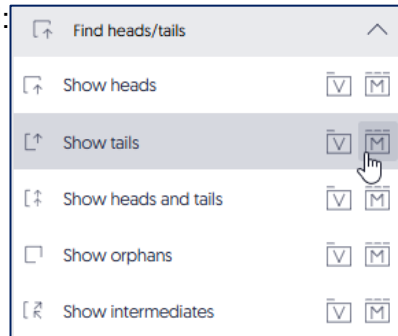
Detected loops		
Loops		
✓	15, 17, 20	(Score 1.00)

And clicking on the icon  will mean that a new tab is created and a map of the loops shown.

The 'Potency nodes' tab in the analysis reveals which of the statements in many loops are drivers for most loops. In the example we have only one loop and so all statements in loops have the same potency.

Find heads/tails

This analysis provides for many straightforward searches that can be undertaken on the current view or on the whole model:



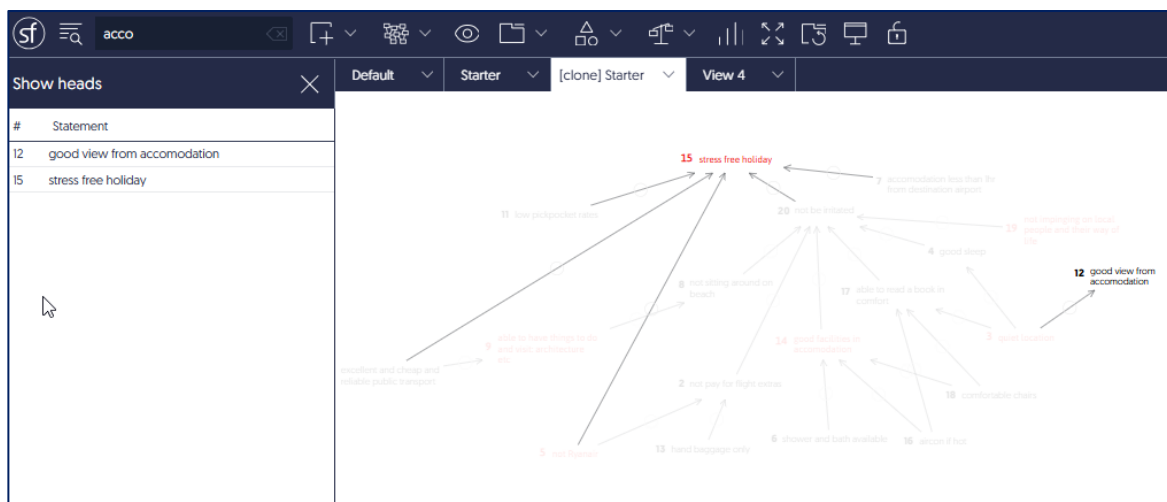
Show heads reveals all statements with no out-arrows – final outcomes that are often ‘Goals’.

Show tails reveals all statement with no in-arrows – drivers.

Show orphans reveals all statement with no in or out-arrows – disconnected from the rest of the causal map (often because they were missed when considering links and so might now be linked).

Show intermediates reveals all of the statements that have both in and out-arrows.

The reveal from the analysis greys out all of the statements on the current view that are not meeting the requirement of the analysis. Thus, for reveal of heads we see:




Note that after the analysis, in order to get that map without greyed out statements, use the ‘Reset view’ icon on the top row 

All other analysis options are discussed in the Analysis manual.

Step 6: Viewing different aspects of the model

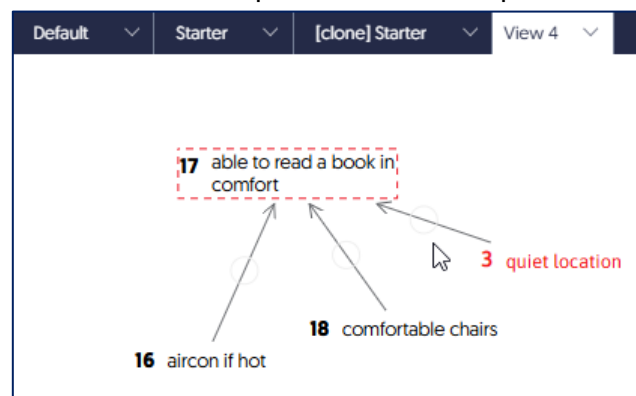
Create a map showing all dependencies or influences of a statement

Select the statement of interest (a red dashed box appears around it).

Use the 'Analysis' menu , select the 'Mapping' option, and either 'Influence range' or 'Dependency range'.

Strategyfinder will create a new tab/view and show all of the statement and links that either the selected statement influences or the statements on which the selected statement is dependent.

For example, if #17 is selected and dependencies are requested then the new tab/view will show:



Show hidden links

When viewing a part of the whole model (as above when the focus was on #17) it is often useful to see how this part of the model links to the rest of the causal map. Show hidden links enables this.

Click the 'Mapping' icon on the top row

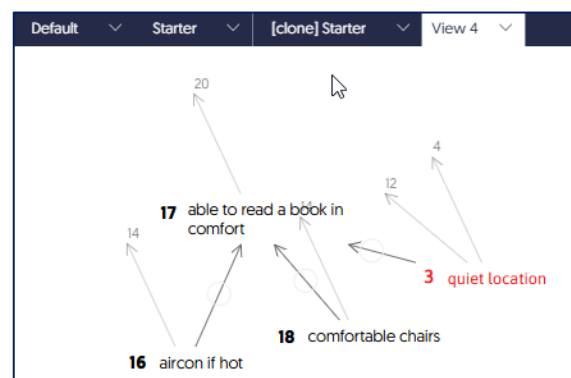


Click 'Show hidden links'

And choose whether to see all 'on'

Or 'Selected only' Or not show them 'Off'

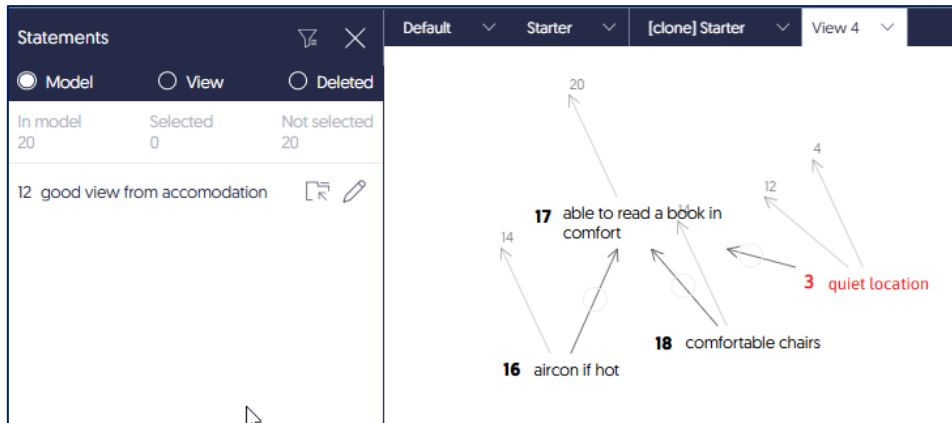
Turning the hidden links on will change the view to:




If you want to add any of these statements to the map then either:

- i) search for the statement number and bring the statement to the map

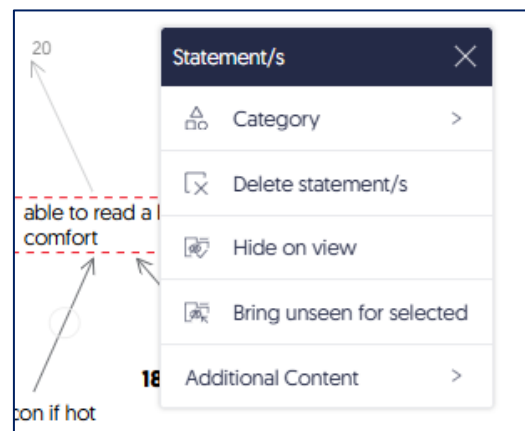
Here we are curious about #12, that comes from #3.



Clicking on  will bring #12 to the view.

- ii) use right click and 'Bring unseen for selected' which will give the option of bring ins, outs, or both ins and outs for the elected statement.

Here statement #20 has been selected.



Hide statements from a view/tab

Right click the statement and choose 'Hide on view'. Note this does not DELETE the statement from the model it simply means it does not show on this particular view.

Note that a selection of statement can be hidden by selecting them and the right clicking and choosing 'Hide on view'.

Step 7: Categorising the material – goals, strategies, options, actions

Strategyfinder enables statements to be categorised. There are default categories provided: Goal, Strategy, Option, Action and Focus. These categories have been designed for use in problem solving, strategy making and risk management⁵.

In the brainstorming example we may, for example, wish to regard the final outcomes (#15 and #12) as obvious ‘Goals’ along with #20). Goals are regarded as non-optional outcomes.

Strategies are usually optional outcomes that deliver Goals, and require a portfolio of actions to make them work – they are complex outcomes. In the example we might regard #14 as a strategy: aiming to get accommodation that provides good facilities – may not yet be fully specified by #6, #16 and #18, and may be defined by what is on offer and so a complex outcome to achieve.

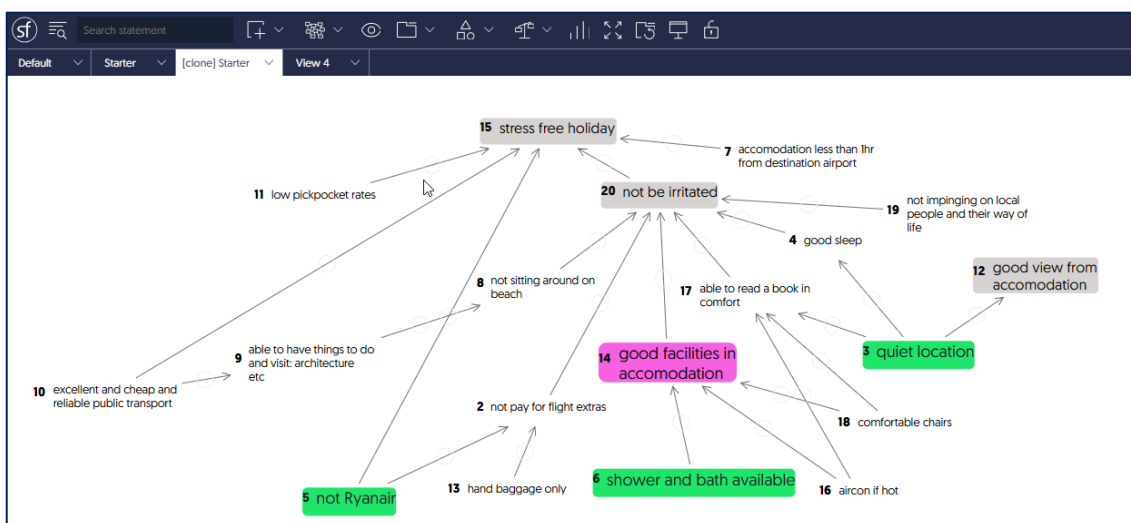
Options are those possible Actions that deliver Strategies. Sometimes obvious actions can be located by considering the number of out-arrows, and also ‘Hierarchical potency’ analysis helps – see Analysis manual.

In deciding ‘Actions’ for our brainstorm we may choose to prioritise key requirements as Actions.

Categorisation is achieved by right clicking, choosing ‘Category’ and selecting the category. Several statements can be categorised at the same time by selecting several and right clicking.

Categories can be reset to the default by ‘Reset category’.

Thus, for example, in our brainstorming example we may categorise as follows:



⁵ See the *Strategyfinder* Strategy Finding, Solution Finding and Systemic Risk manuals for more discussion of their use.

Possible Issues in Using *Strategyfinder*

As with all software there can be unknown bugs. These are reported and dealt with as fast as possible and your server updated.

However, because *Strategyfinder* is browser based and will often involve many participants in many different locations there can be synchronisation problems. These are most often caused by: i) slow or intermittent internet, ii) too many programs open on a user's computer, iii) too many tabs of the browser open.

The easiest resolution is i) close other programs and other browser tabs, and ii) do a browser refresh: the circular arrow at the top left of the browser



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.

Strategyfinder
Consulting Software GmbH
FN 623983y, ATU80524309

Dr Anita Reinbacher
Muenichreiterstrasse 25
A-1130 Vienna Austria
Mail@Strategyfinder.com

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