

Strategy → finder

METHOD
BRAINSTORMING

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Strategyfinder for Brainstorming

NOTE: Read 'Strategyfinder – Getting started' manual first!

The process outlined in this manual will be most often used with participants who have already used *Strategyfinder* before. Thus, they will be already registered Users with a login email and password.

It will usually be a quick process – 30-60mins.

The facilitator/manager will be collecting ideas and not necessarily using the workshop to build an action plan (although this can be done¹).

Quick setup required – the facilitator/manager might simply phone around team members available.

There are many ways to do brainstorming using *Strategyfinder*, but this process/method works well. We recommend you start with this process and adapt as you wish after experiencing its use.

Preparation

Task 1. Setup 'welcome' statement on default view

As with any workshop using *Strategyfinder*, it is common to use the default view to welcome participants. However, its main purpose is to allow everyone to see who has connected to *Strategyfinder* and allow new users to easily learn how to enter statements and links. Regardless of whether Users are familiar with *Strategyfinder*, it is still very helpful to use the 'welcome' view.



Thus, in advance, or at the beginning, of the workshop, setup the following:

- Statement #1 on the default view: "Welcome – please double click somewhere on the screen and type your name, hit 'enter'"
- Create a new view and rename it: for example, 'starter' or 'gather'


Task 2. Decide on a starter question


Such as "what ideas do we have that could use some of our left-over budget this year?"

On a new view called 'starter', put the starter question (statement #2) in middle of screen.

Rename the model – use the Sf icon top left  and then .

Task 3. Set model 'setting' if required²

In particular, decide whether submissions from participants are to be anonymous to the facilitator. This decision is partly an ethical issue and the SuperUser will need to decide whether to inform participants. Go the Sf icon and select the 'Model settings' cog .

Use the switch  Show Statement Author on hover

This facility can be toggled on and off during the workshop.

¹ The manuals 'sf RISK' and 'sf SOLUTION': a 2hr workshop – ad hoc to work on a complex/messy problem' each have sections on developing implementation plans and project management.

² Go to the 'Strategyfinder – the basics' manual for more detail on the 'sf' drop-in menu.

Brainstorming workshop (30-60mins)

Task 1. Invite participants to add their name to the default view (3mins).

Purpose: Allow the facilitator to i) establish whether participants have logged on to *Strategyfinder* and the model and ii) that they have experience entering a statement on to a view.

Once they have entered their name, invite them to move their name/statement around the view.

Remind them that they can edit their own statements but not those entered by other participants. They may like to experiment by editing their own name.

Facilitator notes:

Beware that, for first time users of *Strategyfinder* and without a familiarisation session, then some participants might mis-type the URL or their email address and so take more time than expected to get going. Thus, without familiarisation, from attending previous *Strategyfinder* workshops, task 1 might take 10mins.

Task 2. Introduce the topic – shown on starter view

Task 3. Gather an initial set of ideas

Use ‘blind gather’ for getting ideas from the participants



Setup the ‘blind gather’: provide a topic, which view the statements are to be gathered on (in this case the ‘starter’ view), and maximum number of statements each participant can add.

Look for around 40-50 ideas, so divide number of ideas by number of participants to set maximum number of statements in blind gather setup.

Let participants know that the maximum number of ideas they can enter is simply to get a starter view, and to give all participants a chance to set out their initial ideas anonymously – they will be able to add more once the starter set is complete and all can view them.

‘Start gathering’ and the ‘blind gather’ icon turns red as a reminder to the facilitator.

The facilitator clusters similar or related ideas by moving ideas around the screen as they appear. Each cluster represents a rough topic.

Stop blind gather when group is running down (usually after ~20mins), or screen is full (>40 ideas).

Facilitator notes:

The clustering only serves as a temporary structuring of the statements that will allow the facilitator to get all the participants to ‘listen’ to the views of others in Task 4. Therefore, it is not crucial that the clusters are absolutely correct (whatever that means!).

Task 4. Summarise clusters to facilitate ‘listening’ and encourage additions

Stop ‘blind gather’ (note that the icon now loses its red colour) and summarise the contribution so far via each of the clusters in turn: ask participants to look at, for example, the ‘top-right’ of the view briefly present it, noting the topic it covers.

Note that the clusters are very rough, and so it will not, at this stage, be worth arguing about whether they are correct – looking at clusters is a simple way of getting a view of the material.

Task 5. Additions.

Ask participants for any new thoughts that come to mind now they have seen the initial set of ideas. These can be added using ‘open gather’ where all can see the new ideas as they are entered. Ask participants to locate their idea close to the cluster appropriate or start a new cluster.

Task 6. Initial Evaluation – narrow down the number of ideas

Ask each participant to select the 3 ideas they think are most excellent and note the statement number – they are not allowed to select one of their own ideas.

Ask each participant, in turn, to state ONLY one of their three – choosing their top one first. The facilitator adds an asterisk to the end of the chosen statement, and while doing so the facilitator hovers over the statement to check that it does not belong to the person offering it (providing authorship is turned on).

Go around for a second and third time until such time as there is a maximum of 15 asterisks items.

Change the category of these asterisks ideas to ‘focus’ (RED).

Task 7. Focus via Evaluation – ‘rating’³

Select all the ‘focus’ ideas (REDS) – use the ‘Categories’ menu and ‘Select by category’.

Go to the ‘Evaluations’ menu and select ‘Setup rating’⁴. Use the default rating scale of 0-10.

Instruct participants to rate the asterisked ideas, where 10 is the best idea, and 0 the worst. At least one idea MUST be rated 0 and at least one idea rated the best (to provide anchor points). The scale is about relativity of ideas – a zero rating does not mean it is a bad idea, rather that it is rated as the worst among those being rated.

Start rating.

As rating results show on the facilitator/SuperUser screen keep an eye on the degree of consensus emerging.

Task 8. Report on Rating results

Go to Evaluations menu and ‘Display Rating’ and choose the rating to display (only one will be available).

Use presentation mode so that all can see the results. Note that the coloured band shows the degree of consensus –more green -> more consensus, more red -> less consensus. A bar chart can be displayed to show the results.

Facilitator note:

If using ‘share screen’ in Zoom/Team/etc then beware that if you have authorship turned on in model settings then everyone will see the author if you accidentally hover over a statement, or if sharing ‘Display preferencing outcomes’ then hovering over the blobs.

³ See ‘Strategyfinder – the basics’ for a brief summary of using rating and preferencing.

⁴ See the ‘Strategyfinder - Evaluations – Rating and Preferencing’ for more detail on using preferencing

Task 9. Focus on best ideas

Change the style of each top rated/high consensus ideas to 'option' (green). Look to turn about a maximum of 7-8 ideas to options.

Display all the options on a new view: go to 'Categories' menu, go to 'Select by category', tick 'Option'. Go to 'Views' menu, 'Bring selected to new view', name the new view. All the 'Options' will now show on the new view.

The process could be complete at this stage – where the final list of 'Options' are agreed. Or, if time, proceed to Tasks 10-12.

Task 10 [Optional]. Consider causal links between best ideas.

Gather links - Ask the group to insert links where implementing one idea would help achieve another idea.

Task 11. Refine Prioritising, bearing in mind links (if Task 10 has been completed).

Use preferencing. Got 'Evaluations' and 'Setup preferencing'.

Use the 2 dimensions of impact and practicality: with impact (7xblue) and practicality (7xgreen) resources. Ask participants to now consider the pattern of causal links as they make their judgments – for example if an option will EASILY drive many other options then it might deserve a higher impact evaluation.

Remind the group about what is supposed to be finally impacted – as presented at the beginning of the workshop through the initial question on the 'starter' view.

Either print the results screen, for use by the facilitator, so that it can be referred to when displaying the results, or alternatively make a quick note of ideas that have both a high number of impact blobs and high number of practicality blobs. A good evaluation has high impact/high practicality/high consensus.

Task 12. Display Refined Priorities

When Refined Prioritising is complete discuss the outcome.

Use 'Display preferencing' and 'Toggle presentation mode'.

Look for high practicality AND high impact with the group and declare consensus from your printout or notes.

Alternatively use 'share screen' and 'Display preferencing outcomes'.

Facilitator note:

If using 'share screen' in Zoom/Team/etc then beware that if you have authorship turned on in model settings then everyone will see the author if you accidentally hover over a statement, or if sharing 'Display preferencing outcomes' then hovering over the blobs.

Where there is consensual high impact but low practicality – discuss whether the idea can be made more practical.

It may also be worth discussing consensual high practicality to see whether the group can suggest ways in which it could be made more impactful.

High consensus does not necessarily mean all participants have placed a blob on an idea but rather that a solid majority have done so – judgment is required.

When there is little consensus then further discussion may be needed to elaborate and discuss ideas, and then a second preferencing takes place (in a form of 'Delphi technique'⁵).

⁵ See '*Strategyfinder* for Estimating using Delphi' manual

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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