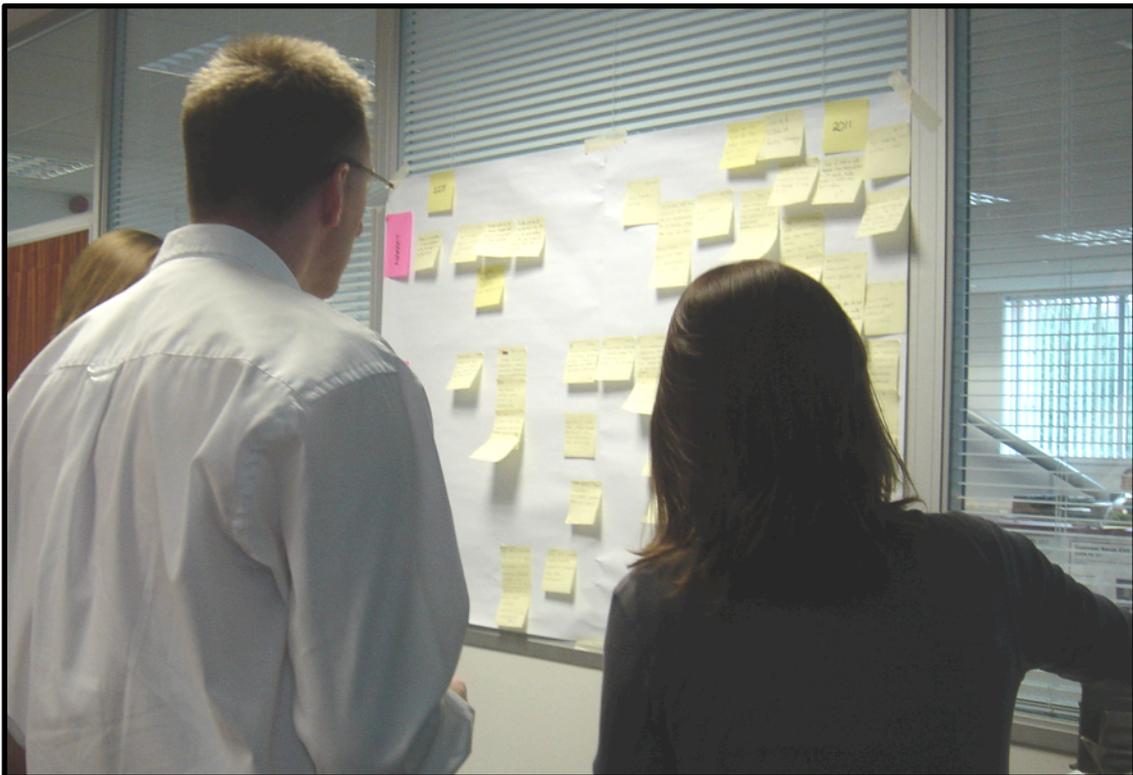


Institute for Manufacturing Emerging Industries Programme
Managing Creation and Transitions Project

Organisation Scan

**Multifunctional workshop guidance to map organisation
development and change, capturing lessons learned**



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1. Overview

The Organisation Scan method described in this document was developed as part of the Institute for Manufacturing's Emerging Industries Programme (EIP)¹, as a deliverable from the Managing Creation and Transitions Project². It forms part of a suite of related approaches, underpinned by a conceptual framework, with a particular focus on technology-intensive innovation:

- a) *Industry Scan*: mapping and understanding historical industrial emergence, evolution, development and change.
- b) *Expert Scan*: interview-based mapping of historical industrial emergence, evolution, development and change.
- c) *Organisation Scan*: multifunctional workshop method for mapping organisation development and change, capturing lessons learned.
- d) *Emergence Roadmap*: workshop method for mapping an emergent commercial opportunity through demonstrators and actions.

The purpose of the Organisation Scan method, its context and relationships to other approaches is described below, with detailed guidance provided in subsequent sections.

1.1 Purpose

The purpose of the Organisation Scan method is to help organisations understand how key lessons learned in the past may be applied to the future. It explores how an organisation, business unit or product line previously navigated barriers or created opportunities. The output is a visual depiction (map), which provides a permanent record of the journey to date, and a set of learning points that can be used for an action plan to address the current or future situation.

The Organisation Scan workshop-based method is intended for use by managers, technologists, consultants and analysts, enabling them to address challenges such as:

- Investigating the history of particular product line, to compare with a new product or when implementing significant changes.
- Reviewing evolution of a specific business unit, functional area or even the whole company over a period of time, to set the scene before major strategy development.
- Examining a company's policy or strategy in a certain area, such as intellectual property, to review what works well and what needs changing for the future.

1.2 Background

The approach described in this document is based on roadmapping principles. Roadmaps are structured time-based graphical representations of strategy, illustrated in Figure 1, widely used to support strategic planning at product, firm and sector levels³. The layers in a roadmap represent key dimensions of the system being considered, enabling stakeholder perspectives to be presented in a structured way.

¹ www.ifm.eng.cam.ac.uk/imrc/eip

² www.ifm.eng.cam.ac.uk/imrc/eip/transitions.html

³ Phaal, R., Farrukh, C. and Probert, D. (2010), *Roadmapping for strategy and innovation – aligning technology and markets in a dynamic world*, Institute for Manufacturing, University of Cambridge, ISBN 978-1-902546-82-7, www.amazon.co.uk.

The roadmapping method has been used within the Emerging Industries Programme to map historical examples of technology-intensive industrial emergence and development in a wide variety of contexts. Learning from these maps has helped to understand the underlying principles and patterns of such emergence, to improve planning for the future. Key aspects of the resulting framework for mapping industrial emergence are summarised below, together with the set of practical methods that has been developed.

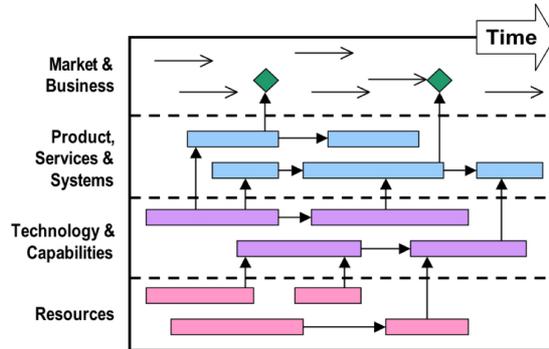


Figure 1 – Schematic roadmap

1.3 Framework for industrial emergence

Key aspects of the industrial emergence framework⁴ are highlighted in Figure 2:

- *Industry lifecycle*, with an emphasis on technology-intensive industries that emerge from the science base, structured according to key phases and transitions, associated with science, technology, application and market dominated activity.
- *'Demonstrator chain'*, demarcating the phases and transitions of industrial emergence, providing tangible intermediate targets that can be used to focus strategy.

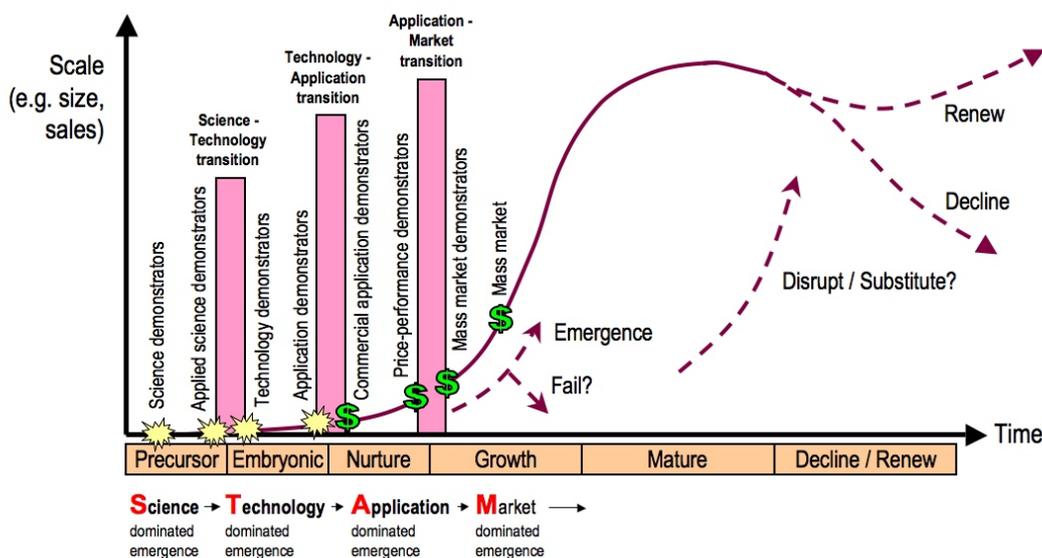


Figure 2 - Phases and transitions of technology-intensive industrial emergence, highlighting the 'demonstrator chain' that demarcates the phases and transitions

⁴ Phaal, R., O'Sullivan, E., Routley, M., Ford, S. and Probert, D. (2011), 'A framework for mapping industrial emergence', *Technological Forecasting & Social Change*, 78, pp. 217-230.

The framework emphasises the early stages of technology-intensive industrial emergence, focusing on four phases and the three intermediate transitions (*S-T-A-M*), together with associated demonstrators:

1. *Precursor phase* (science-dominated emergence): Activities that establish the supporting scientific phenomena (and/or underpinning technology platform), extending through to the first demonstrator(s) of application potential, which stimulate industrial interest and investment in particular market-directed technology feasibility studies.
2. *Science-technology transition* (S-T): Demonstrating the feasibility of a scientific phenomenon (and/or underpinning technology) to support a new market-directed technology platform, showing the feasibility of the supporting science and technology to be integrated into an application-specific functional technology system.
3. *Embryonic phase* (technology-dominated emergence): Improving the reliability and performance of the market-directed technology to a point where it can be demonstrated in a market-specific environment.
4. *Technology–application transition* (T–A): Developing the technology and application to a point where commercial potential can be demonstrated through revenue generation.
5. *Nurture phase* (application-dominated emergence): Improving the price and performance of the application to a point where sustainable business potential can be demonstrated.
6. *Application–market transition* (A–M): Translating price-performance demonstrators into a market with mass growth potential.
7. *Growth phase* (market-dominated emergence): Marketing, commercial and business development leading to sustainable industrial growth.
8. *Mature phase*: Refining established applications, production processes and business models.
9. *Decline / renew phase*: The industry either declines (through competitive disruption) or is sustained or renewed through the development of new science-based technologies that repeat the above phases.

The above framework is a simplified representation of the complex reality of industrial emergence, which is a product of the many decisions and actions of the actors involved, ranging from researchers to firms, government agencies and consumers. However, the framework provides structure within which the behaviour of such systems can be mapped, understood and communicated, and a basis for strategy development and decision-making.

1.4 Toolset

A set of four practical methods (tools) has been developed within the EIP project, building on the framework for industrial emergence: a) Industry Scan, b) Expert Scan, c) Organisation Scan, and d) Emergence Roadmap. The methods are specifically designed for technology-intensive industrial emergence, and can also be applied in other situations with appropriate adaptation (where different patterns, phases, transitions, events and milestones may have relevance) – for example:

- Exploring the evolution of technologies, applications and markets to understand how industries develop and emerge.
- Mapping the progress of a corporate venture, to identify learning points for future such initiatives.

- Investigating the various experiences of stakeholders in a regional industrial cluster, to build up a picture of how the set of firms co-evolved.
- Capturing workshop participant perspectives on past innovation initiatives in a firm, to identify strengths and weaknesses as an input into innovation strategy.
- Strategic planning for early stage technology ventures, building consensus about the long term goals and intermediate steps and actions required to move forward.

A modular philosophy has been adopted, in the sense that the methods can be used in isolation or in various combinations, with each other and with other tools and processes. Three of the methods support mapping of the historical emergence and development of industrial systems, to identify patterns, enablers and barriers – the learning from these approaches can be a useful input to strategic planning, which is the focus for the fourth method:

- a) *Industry Scan (IS)*: a research method for exploring, understanding and communicating patterns, enablers and barriers associated with historical industrial emergence, supporting policy, strategy and innovation processes.
- b) *Expert Scan (ES)*: an interview-based technique for capturing personal perspectives of historical industrial emergence, which can be combined to understand patterns, enablers and barriers, as an input to strategy, policy and innovation processes.
- c) *Organisation Scan (OS)*: a workshop-based approach for mapping and sharing experience of a specific historical development within an organisation, to capture lessons learned, from multiple perspectives, as an input to strategy, policy and innovation processes (the subject of this guide).
- d) *Emergence Roadmap (ER)*: a workshop-based roadmapping method, configured to support organisations navigating science and technology-based industrial emergence, clarifying decision making and action plans. Multifunctional workshops enable priority steps to be identified through focussing on a demonstrator chain to commercialisation.

The Emergence Roadmap method requires a relatively clear focus, in terms of an identified future opportunity. It can be used in conjunction with the Value Roadmap (VR) workshop-based approach for exploring, identifying and prioritising future opportunities for early-stage technology⁵.

The relationships between these tool modules are shown in Figure 3, all of which are based on roadmapping principles⁶, enhanced by the industrial emergence framework where appropriate. The tools are positioned against two dimensions:

1. *Time*: past (learning from previous experience) and future (strategy).
2. *Level*: focus for application, ranging from industry/sector to firm and product.

As noted above, the EIP tools can be applied separately or in combination, depending on context and purpose, with the positioning in Figure 3 indicating potentially useful interactions when used together or in combination with other tools and processes. The set of three historical mapping tools can be used separately or together, and are ‘scaleable’ in the sense that they can be applied at industry, firm and product levels. The Expert and Organisation Scan approaches provide guidance on how to engage with experts through interviews and workshops. The Industry Scan focuses on the map itself, in terms of how to gather, organise and represent information relating

⁵ Dissel, M.C., Phaal, R., Farukh, C.J. and Probert, D.R. (2009), ‘Value roadmapping: a systematic approach for early stage technology investment decisions’, *Research Technology Management*, Nov-Dec, pp. 45-53.

⁶ Phaal, R., Muller, G. (2009), ‘An architectural framework for roadmapping: towards visual strategy’, *Technology Forecasting & Social Change*, 76 (1), pp. 39-49.

to the development and evolution of a complex system, with particular reference to industrial emergence. Learning from the historical scanning methods is a useful input into future-oriented strategic planning processes, including the Emergence Roadmap and other tools and methods such as portfolio management.

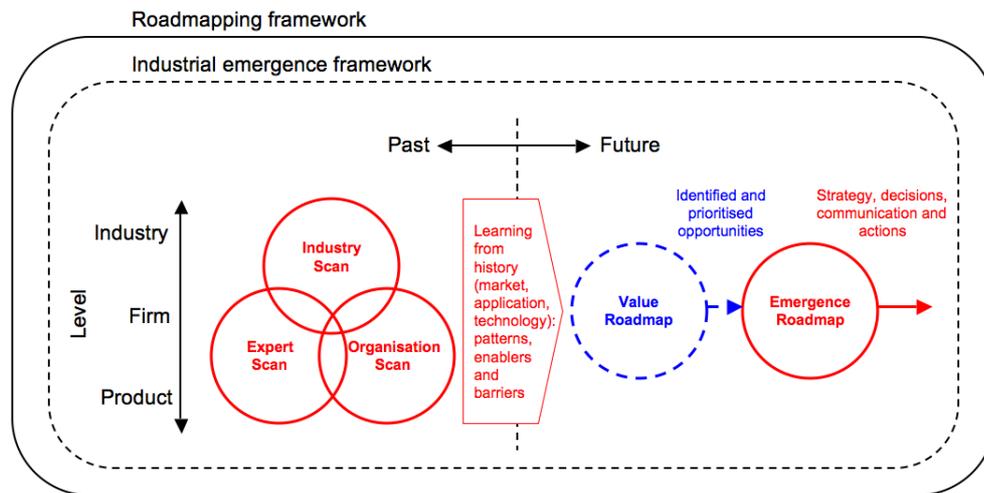


Figure 3 – Tool modules and relationships, positioned against time (past and future) and level (industry, firm and product); the Value Roadmap method (dashed circle) can be used in conjunction with the Emergence Roadmap approach if helpful, to provide focus

In terms of other tools, of particular note is the Value Roadmap method, which is an adaptation of the more general S-Plan roadmap approach, used for general strategic planning at firm and sector levels⁷. The VR and ER methods are particularly suited for strategic planning of early-stage technology, providing alternatives to the ‘Strategic Landscape’ and ‘Topic Roadmap’ modules in S-Plan for this context.

The workshop-based S-Plan approach is based on a modular philosophy, enabling management tools to be combined in various ways around a core roadmapping process. The roadmapping modules operate at two levels: business and topic (option) – see #3 and 7 in Figure 4. Other tool modules that have been incorporated include: intelligence map depicting external drivers (#1), scenario matrix (#2), QFD-style linkage grids (#4), innovation matrix (#5), portfolio matrix (#6) and business case templates (#8). Figure 4 relates to business strategy and innovation applications of S-Plan, which can also be applied at the sector level.

The EIP tool modules can also be positioned within the S-Plan process framework as shown in Figure 4:

- The historical mapping methods can provide an input to roadmapping modules to improve understanding of the past and current situation, so that learning points (development patterns, enablers and barriers) can be taken into account, at both business (#3) and topic (#7) levels. For example, the three methods (ES, OS and IS) might be used together where a clear depiction of the historical emergence of a sector is desired (#3), incorporating perspectives from both expert interviews and workshop engagements. When focusing on a particular innovation opportunity (#7), incorporating a workshop module (OS) prior to the topic roadmapping activity may be desirable to ensure that learning from previous developments is identified and incorporated.

⁷ Phaal, R., Farrukh, C.J.P. and Probert, D.R. (2007), ‘Strategic roadmapping: a workshop-based approach for identifying and exploring innovation issues and opportunities’, *Engineering Management Journal*, 19 (1), pp. 16-24.

- The Emergence Roadmap method can replace the topic roadmap module (#7) for early-stage technology exploitation strategy development (or where more structure than provided by the topic roadmapping approach is desired). Similarly, the Value Roadmap method can replace the Strategic Landscape module (#3), providing a means for identifying and prioritising application opportunities for early-stage technologies, where there may be many potential routes to market, with substantial commercial and technical uncertainties.

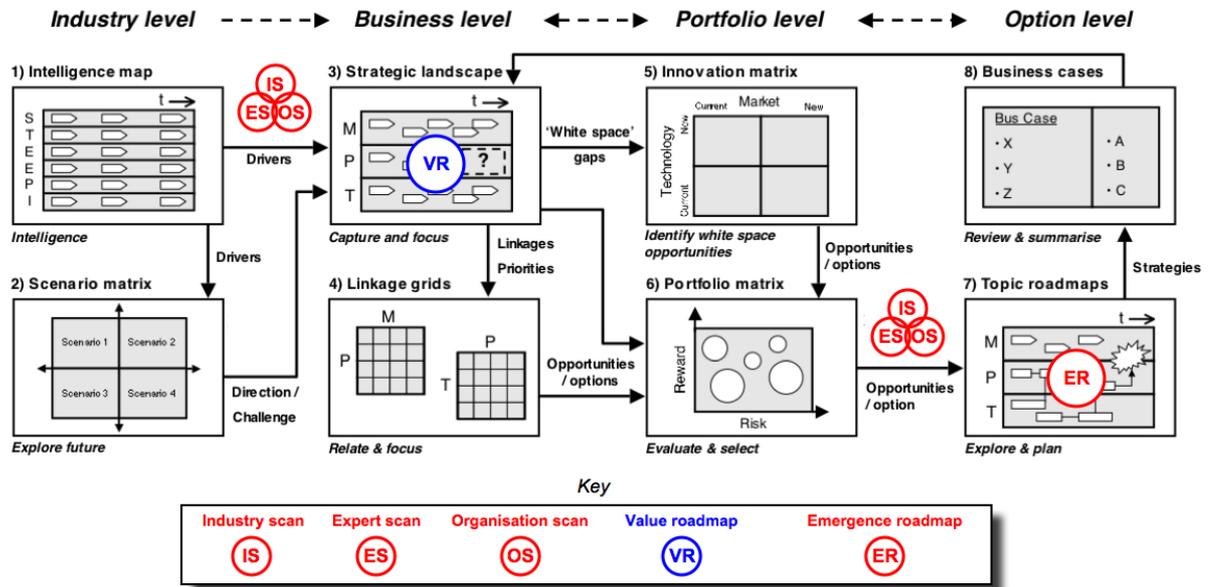


Figure 4 – Positioning of EIP and other strategic management tool modules within the S-Plan strategic roadmapping workshop-based method (business and innovation strategy)

2. Organisation Scan Guidance

2.1 Introduction

As stated in Section 1, the purpose of the Organisation Scan method is to help organisations to understand how key lessons learned in the past may be applied to the future, to make the most of opportunities and effectively address barriers. It uses a workshop-based approach to capture several perspectives relevant to the organisational history being explored.

The Organisation Scan workshop enables a sharing of perspectives and time to reflect on the past. Input from participants not present can be included through the pre-preparation of sticky notes. It explores how an organisation (or business unit) previously navigated barriers to development or created opportunities, so that the organisation can capture and implement the learning in future situations. It also provides an efficient communication mechanism so that different perspectives within the organisation can ‘start from the same page’ for strategic future discussions. The output is a visual depiction (map) and a set of learning points that can be used for an action plan to address the current or future situation. The whole process is summarised in Figure 5.

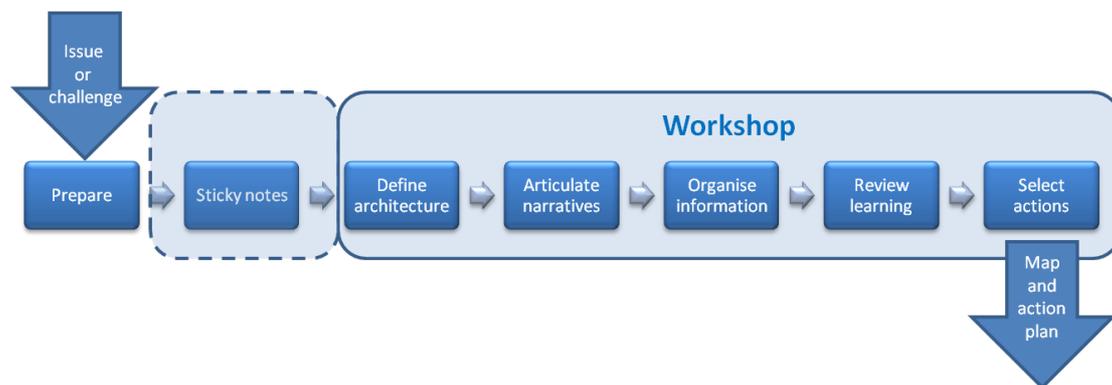


Figure 5 – Summary flow chart of the Organisation Scan process: dashed line indicates options for preparation of sticky notes before the workshop or within the workshop

By implementing the knowledge captured through the workshop, the company will be able to learn from the benefit of hindsight, and likely benefits include reduced time to market for new products, capturing greater value through maximising opportunities, reducing risk and cost through better navigation of barriers and improved communication between the functional areas involved in the workshop.

2.2 Application of the Organisation Scan

The Organisation Scan has been applied in several different contexts:

- A half-day (three hour) standalone module to investigate a specific:
 - product line
 - service offering
 - area of business strategy e.g. intellectual property.
- A half-day (two to three hour) module combined with a forward-looking module, such as the Emergence Roadmap workshop, in a subsequent half-day. This allows very thorough investigation of a future opportunity, in the light of previous experience and lessons learned from the past.
- A one-hour module applied as part of the IfM ECS Business Strategy Tool workshop process. Typically undertaken at the start of the process, before workshop 1, it provides a

rapid mechanism to ensure participants have a common understanding of the key elements of the history of the organisation or business unit investigating strategy development.

The Organisation Scan has, at its core, multiple perspectives, captured in the form of sticky notes prepared by participants. Preparation of these notes can be undertaken in a number of ways depending on the timing involved before the workshop and the numbers involved in the workshop:

- (A) Sticky notes prepared by individuals in advance,
- (B) Sticky notes prepared by individuals within the workshop,
- (C) Sticky notes prepared by small groups within the workshop.

The preferred process for preparation of the notes is for individuals to undertake this activity, in advance of the workshop (A). The focus and scope of the workshop (as described in the following section) need to be clearly defined in advance, so that participants are aware of what topic should be described by their sticky notes.

It is recommended that if there are up to six participants, sticky notes should be prepared in advance (A). If there are six or more participants, then ideally the workshop include a small group activity (each with 2-4 people) to prepare the sticky notes (C). Although it is possible to have individuals preparing sticky notes during the workshop (B), this tends to be less ideal.

2.3 Workshop Preparation

In advance of any workshop, the correct definition of the aims of the workshop is critical, as there are several options and formats which can be applied, and this initial definition will help in the selection of the most appropriate options. This should be clarified through detailed discussion with a contact in the organisation.

The focus, scope and aims of the workshop should be defined. The *focus* refers to the primary theme under investigation – is this the organisation as a whole, or a particular product line? The *scope* will constrain the layers of interest and timeframe to be covered, and is most useful for defining the architecture of the map. The *aims* of the workshop typically include better cross-functional understanding and communication of the current situation, working towards development of an action plan. Generally the Organisation Scan will be used as a precursor activity to another intervention, such as a strategy workshop or emergence roadmap workshop, as it allows a good exchange of information and participants can then have a common understanding of the journey to date, from a number of perspectives.

The *architecture* refers to the canvas – the horizontal and vertical axes – that will be used for the Organisation Scan map. The horizontal axis will be time, with the far right being the present day. The timeframe chosen should be pertinent to the topic being explored – if it is the organisation as a whole, then the start may be the foundation of the company. If the topic is narrower, such as a particular product line, then it may be more appropriate to focus on the specific time that the company has been involved in such products. Or it may be relevant to extend the scope outside the company, if there are key events/activities in the wider industry landscape, before the company was involved in those products. One of the key points of the Organisation Scan is to capture learning from the company's experience, so general industry information is important, and should be included when it is pertinent to the company's journey. The vertical axis should include important dimensions relevant to the scope of the workshop. In very general terms these dimensions tend to include value context (external trends and drivers), value capture (the organisation's business models, products and processes), and value creation (underpinning technology and resources, including suppliers). It may be appropriate to use the business functions represented in the workshop (management, operations, technical, etc) as descriptors for the vertical axis layers. This

should be discussed in advance with the company contact to get an idea of what layers may be useful for the canvas. Note however, that structuring the canvas with sticky notes allows for readjustment real-time in the workshop, if proposed layers are found to be inappropriate.

Decisions should be made regarding the process to be used and the time allowance of the agenda. The context and purpose will determine many of these decisions which are interlinked. Depending on the purpose, the Organisation Scan workshop may be set up as a standalone module or in combination with another strategic activity. This impacts the likely timing and agenda. Clarification of the purpose should help to identify potential participants. The Organisation Scan works best when different perspectives are represented, typically different functions within the organisation, or people who have been working for the organisation for different lengths of time. The number of participants may then dictate the most appropriate process for sticky note preparation - whether the narratives are provided by different individuals or groups. As each narrative typically takes 5-10 minutes, generally it is not appropriate to have more than 4-8 narratives in total.

As mentioned in the previous section, there are two primary routes for the Organisation Scan narrative preparation – either sticky notes are prepared in advance, or prepared within the workshop.

(A) Sticky notes prepared by individuals in advance:

If sticky notes are prepared in advance, then it is useful to have an internal company champion with a good understanding of the process who can distribute information and ensure that the preparatory work is carried out.

If sticky notes are prepared within the workshop, then the timing needs to allow for this. Pens and sticky notes should be provided. The architecture of the map should be discussed – the timeframe being considered and the layers for the vertical axis, as agreed in advance with the organisation contact.

(B) Sticky notes prepared by individuals within the workshop:

Up to 10 minutes can be allowed for individuals to prepare sticky notes, although a 5 minute time allowance tends to work better.

(C) Sticky notes prepared by small groups within the workshop:

Small groups can prepare sticky notes, and typically a 10-15 minute timeframe is enough for this. It may be useful to define the groups either by related function, length of time in the organisation, or some other categorisation which makes sense for the topic being investigated.

This guidance outline takes (A) as its core, with explanations for modifications for (B) and (C), as appropriate.

The workshop scheduling will typically depend on the diary commitments and locations of the participants. The venue chosen should have enough space for A0 wall charts and flip charts to be displayed, together with space for participants to move around these.

Agreement should be reached as to the preparation required by IfM and by the organisation. Typically this would entail:

IfM

- Preparation of a briefing note to be circulated to participants, including the focus, scope and aims of the workshop and the venue and timing, together with details of any preparatory work required (see Appendix 1 for an example template for a briefing note).

- Organisation of the wall charts and consumable materials such as sticky notes, pens, sticky dots for voting, etc.
- Organisation of venue and refreshments, if being held at IfM.

Organisation

- Agreement of participants and scheduling.
- Dissemination of briefing note.
- Circulation of sticky notes, if being prepared in advance, and monitoring/collection to ensure completed.
- Organisation of venue and refreshments, if being held on-site.

2.4 Organisation Scan Workshop

The workshop is based on a PowerPoint presentation (Appendix 2 includes the PowerPoint slides and notes) so a data projector and screen (or flat wall space) are required. Appendix 3 is a facilitator checklist with suggested timings for various actions.

Much of the output is captured on wall charts, and so the workshop venue must allow sufficient space for the wall chart, flip chart and for participants to move around these.

The primary steps involved in the half-day Organisation Scan workshop are (see Figure 5 for a summary of the process):

1. *Prepare*

Initial discussion with the organisation should clearly define the purpose, focus and aims for the Organisation Scan, as described in the previous section. Participants should be briefed about the purpose and focus of the workshop, and asked to prepare their story of key events and activities, related to the focus, on up to 10 repositionable notes, with up to 10 words per note (see Appendix 1 for sample briefing note template).

2. *Define map architecture*

Using sticky notes on an A0 sheet of paper visible to the participants, place a timescale on the horizontal axis and indicative layers along the vertical axis, according to the pre-agreed purpose, focus and scope. These notes can be altered or moved during the workshop, as required. The time axis should start at the earliest relevant time and continue until the present day. It may be necessary to have a nonlinear scale, depending on the density of information, and extra sticky notes can be used to further define the timescale during the workshop.

3. *Articulate narratives*

Participants should put up their visual (sticky note) narratives individually, usually starting with the person who has the event with the earliest date. Brief explanation of the content and context of each note should be given, however questions from other participants should be limited to clarification only at this stage.

4. *Organise the information*

Once all participants have added their narratives (together with any narratives provided by personnel who could not be present), the map should be reviewed for missing information and to ensure correct placement of the notes. Similar events and activities can be clustered together, but it is important to position the notes so that the text remains visible. Key enablers and barriers should be identified using a voting process with green and red stickers allocated to each participant. Typically the number of stickers provided to each participant is about one third of the total number of sticky notes on the map. Participants can add more than one sticker to any one sticky note, and they can add more

than one colour, if an event is seen to be both positive and negative. They do not have to use all their stickers.

5. *Review learning points*

Using the results of the voting, key enablers and barriers are highlighted. Those notes with multiple stickers of one colour, or a mixture of coloured stickers, are then discussed by the group to see what learning has been gained, with output captured on a flip chart. Typically the notes with the highest number of stickers are reviewed first, and the total number reviewed will depend on the time available. A useful process is to investigate those notes with red dots first, then red and green dots and finally those with green dots. The facilitator should capture the thoughts provided by the participants on the flip chart. Useful questions to stimulate the discussion include:

- Why was this event/activity considered to be negative/positive?
- Why was this event/activity considered to be both positive and negative?
- What action was taken to overcome this barrier/make the most of this opportunity?
- In hindsight is there anything which could have been done differently?

6. *Select for action*

Once a summary of the learning points has been captured on the flip chart, the current or future situation is considered together with the captured learning, to consider if and how it may be applied. Typically this involves reminding the participants of the particular issue or challenge they identified before the workshop, and working through the learning points to consider if any of the lessons learned could be applicable to the existing situation. If possible, specific action plans are then devised to implement the learning.

This stage may be adjusted if the Organisation Scan workshop is being held in conjunction with another strategic activity, where the learning can be applied once the future situation has been explored in more depth (such as strategy workshops or within emergence roadmap workshops).

After the workshop the Organisation Scan map and the resultant learning points should be transcribed and returned to the organisation as a permanent record.

2.5 Resource Requirements

- Large conference room with space to walk around and wall space for the chart
- Flip chart and easel and marker pens
- Data projector and screen/clear wall
- Sharpie pens
- Sticky notes
- Green and red sticky dots
- Wall chart/A0 sheet of paper
- Digital camera – useful, but not essential, for capturing output.

Appendix 1 – Example Briefing Note Template

[Company Name] Organisation Scan Workshop
[Date] [Month] [Year] [Start time]-[Finish time]
[Venue]

Workshop Focus

[agreed with organisation in advance].

Workshop Objectives

[agreed with organisation in advance].

[Explanation of how this workshop will feed in to other company activities].

In particular the workshop will look at: [example statements to be adjusted to context]

- What has held us back previously? How did we overcome this?
- What has helped us move forward? How did we make the most of any opportunities?
- What currently is holding us back?
- What would help us move forward?

Workshop Agenda

- [Time] Introduction
- [Time] Aims and workshop approach
- [Time] Sticky note narratives and brief discussion
- [Time] Identify and prioritise key learning points
- [Time] Discuss lessons from key learning points
- [Time] Review of current situation in conjunction with learning
- [Time] Summary and wrap up
- [Time] Close

Workshop Participants

[Name] [Role]

....

Preparation Required (see following page for examples)

There will be [number] participants from [company] at the workshop. We would like each of you to prepare the story of [**focus of workshop**], particularly as it relates to [company] **in the past [timeframe agreed with company]**, from your perspective, charting **key** events, milestones, activities, enablers and barriers encountered to date. This story should be represented on **up to 10 sticky notes, each with up to 10 words description**. Please focus on **your knowledge** of what has happened in the past and your opinion of what is most important/significant, in order to prioritise the information presented.

During the workshop we will ask you to place these sticky notes on the map, explaining the story from your perspective, in about [time depends on number of stories expected] minutes, as you do so. The sticky notes should be the usual, square (3"x3", 76mmx76mm) repositionable notes, and it would be helpful if you could **write clearly, number your sticky notes** (in the sequence you will tell your story), and, if possible, **include a relevant date** for the event or milestone you are charting (this may be a year, or more specific, if appropriate). The period we are focussing on is from about [timeframe agreed with company] ago, until the present day. We are interested in considering aspects such as the market trends and drivers, regulatory compliance, environmental demands, products and services, operational issues, technologies, etc. Please bring these prepared sticky notes to the workshop with you.

#	Date
≤ 5 minute story	
≤ 10 post-it notes	
≤ 10 words per post-it	

OCT. 2009 (4)
WRITE YOUR POSTITS
NEATLY AND CLEARLY
SO THEY ARE LEGIBLE



Appendix 2 – Organisation Scan Workshop Slides and Notes



of today's

developed as
erging Industries
f this integrated
ically when
still a precursor

to another activity, such as strategy development. It is useful to gain a picture of the journey taken to date and capture different perspectives.

Overall structure of the session

– this will need to be adjusted according to the number of personnel present and whether or not sticky notes have been prepared in advance of the workshop.

- Start with introductions round the table.
- Then an introduction to the workshop itself and what the aims and approach will be.
- (B/C Optional extra 10 minutes for individuals or groups to prepare sticky notes. If groups are being used, then it often makes sense for these to be arranged by function, or by length of time in the organisation. ****Need to add time to timetable.**)
- Time for each individual or group to put up their sticky notes – typically taking no more than 10 minutes each, and an allowance for a brief discussion to review the overall picture and whether or not anything is missing or misaligned. (This can be reduced to 5 minutes if there is a large number of stories.)
- Review of the sticky notes, identification of key enablers and barriers along the way, and then what was learned from the approach taken to these key enablers and barriers.
- Consideration of how the learning may assist with the current issue identified – flip chart discussion session.
- Wrap up with a summary of the map and the learning points.

The agenda should be prepared in advance, with the process being flexible, according to the number of participants, preparatory work and areas of interest.

Agenda	
10 minutes	Introduction(s)
10 minutes	Aims and workshop approach
60 minutes	Post-it narratives and brief discussion
10 minutes	Identify and prioritise key learning points
45 minutes	Discuss lessons from key learning points
30 minutes	Review of current situation in conjunction with learning
15 minutes	Summary and wrap-up
	Close

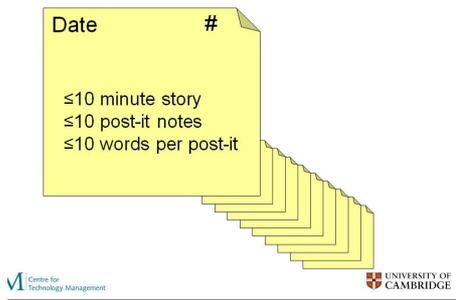
Reminder of Aims

The tool has several aims, primarily to provide a visual record, enhance communication and develop an understanding of lessons learned in the past. It encourages active participation across a range of functions and people are invited to include their own particular perspective showing how this contributes to the overall picture. A permanent record is produced of the journey to date that can be used again as a visual tool. Lessons learned by certain individuals, groups or business units in the past can be passed on to those facing new challenges.

It is also useful at this stage to **remind the participants of the focus and scope of the topic of interest.**

Tool Aims	
•	Enhanced visibility of the current situation.
•	Better visibility of the journey to the current situation.
•	Improved internal communication of different perspectives.
•	Understanding of lessons learned in the past – addressing both opportunities and barriers.
➢	A permanent record of the story so far.
➢	Actions to implement learning in current situation.

Post-It Preparation



Reminder of how sticky notes should look

- Sticky notes need to be clearly written, with no more than 10 words per sticky note, and no more than 10 sticky notes per person/group.
- Sticky notes should capture key events, milestones, issues, enablers and barriers encountered that are relevant to the scope of the map.
- It is useful for each sticky note to be marked with an approximate date and a number. The number reminds the participant which order the sticky notes should be placed on the map.
- Typically Sharpie pens are used rather than biro or ball point.
- It can be useful to allocate different colours to different functions, or if there are core themes running through the map, which all participants understand, these themes could be colour coded.



Animated slide showing the process outcome of the workshop in three photographs

- Structure the canvas with sticky notes – time along the horizontal axis and key layers along the vertical axis (typical layers are market (value context), product/application (value capture) and technology (value creation)).
- Participants individually add their narratives.
- The map is reviewed for completeness/conflict.
- Participants vote for key enablers and barriers.
- These votes are prioritised by volume and mix.

Working through the workshop process 1: Narratives

Once sticky notes are written, then they should be added to the canvas.

Typically the individual/group with the earliest dated sticky note starts first.

Either continue choosing individuals/groups according to the earliest date, or let the participants decide who should be next to add their story.

Each story should be told by an individual adding the sticky note to the appropriate part of the map canvas, explaining the relevance and content of the sticky note as they do so. Each story should take no more than 10 minutes in total, and **this timing can be reduced to allow for a greater number of participants, if required.**

Questions from other participants should be limited to clarification only – this is not the time to debate the relevance of including any particular items within the map. It is more important to get the events and milestones captured on the map than to spend a long time debating the precise position each sticky note should be in.





Working through the workshop process 2: Map review

Once all the relevant stories have been included the map is reviewed as a whole to investigate whether or not anything of significance has been omitted, and if the participants are happy that the map represents the story. At this stage sticky notes can be added or moved, as required. It may be worthwhile clustering similar sticky notes if certain key events and activities have been described by different individuals, and they have not already been put together.



Working through the workshop process 3: Linkages

Linkages between different paths/stories can be added, if this is helpful. Sometimes this is captured through use of sticky notes of different colours (for different participants).

Working through the workshop process 4: Voting

When participants are happy with the map, they should each be given green and red dots for 'voting'. Even if the stories were prepared within small groups, this is now an individual activity, where each participant has the same number of red and green sticky dots.

Green dots should be used to identify events which were seen to be particularly positive or beneficial – enablers.

Red dots should be used to identify events which were negative or detrimental – barriers.



Participants can use more than one dot on a single sticky note and green and red dots can be used on the same sticky note, if it is relevant to do so. Typically the number of dots given to each participant is roughly equal to one third of the total number of sticky notes within the overview map. (i.e. three participants, each told a story in 10 sticky notes: total sticky notes =30, 10 red dots and 10 green dots provided to each participant). This rule of thumb can be adjusted according to the prioritization parameters agreed with the organisation in advance and the timing of the workshop.

During this process we are not looking for consensus, but the aggregate view of all the participants.

Aiming for this kind of output at the end of the mapping stage.



Once participants have voted, the dots on each sticky note are counted, and those with the greatest number of red dots and those with the greatest number of green dots are identified. Those with a mixture of red and green dots are also identified.

The final map has clusters of red and green dots, and those sticky notes with a mixture of colours or a larger number of single colour dots are identified and then discussed for how the organisation address the opportunity/barrier.

These highlighted sticky notes are then reviewed in turn using a flip chart to understand what the barrier/enabler was, and how the organisation dealt with it.

Mapping Sticky Note Narratives: Step-by-step animated slides for mapping process

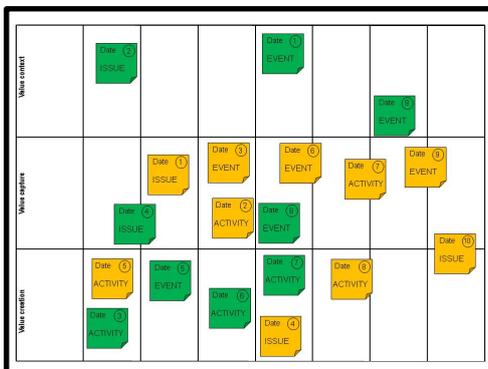
Narratives – 50 minutes (10 minutes each for 5 narratives)

Participants add their stories one at a time, explaining each sticky note.

Typically the individual/group with the earliest dated sticky note starts first.

Questions from other participants should be limited to clarification only.

Remind participants that they will have up to 10 minutes each (**or whatever the timing has been set as**).

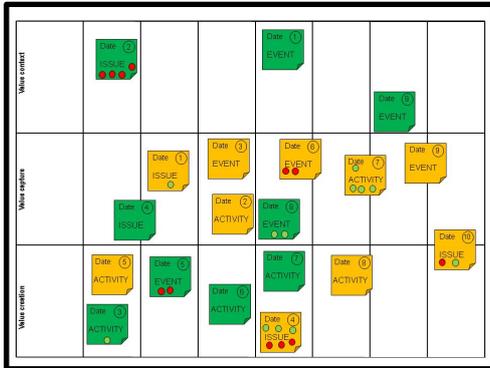


Review of map – 10 minutes

Once all the relevant stories have been included the map is reviewed as a whole to investigate whether or not anything of significance has been omitted, and whether the participants are happy that the map represents the story. At this stage sticky notes can be added or moved, as required. It may be worthwhile clustering similar sticky notes if certain key events and activities have been described by different individuals, and they have not already been put together.

Animated slide: Identification of key enablers and barriers – 5 minutes

Red and green dots are given for identifying key enablers and barriers. What really helped or significantly hindered progress? Participants can use more than one dot on a single sticky note and green and red dots can be used on the same sticky note, if it is relevant to do so.

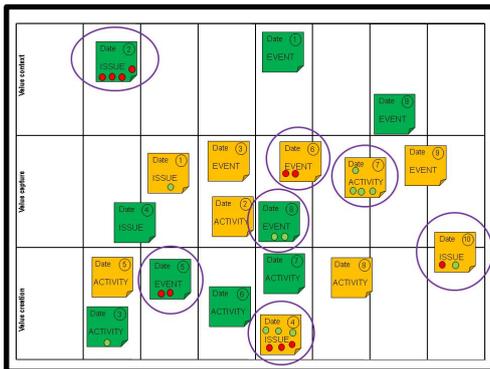


Remind participants:

- They will only be allocated a certain number of dots
- They can place more than one dot on any one sticky note
- They can place more than one colour on a sticky note, if they feel this is a true representation of the situation: a dyad (both enabler and barrier).

Animated slide: Prioritisation of enablers and barriers - 5 minutes

Dots on each sticky note are counted, and those with the greatest number of red dots (barriers) and those with the greatest number of green dots (enablers) are identified.

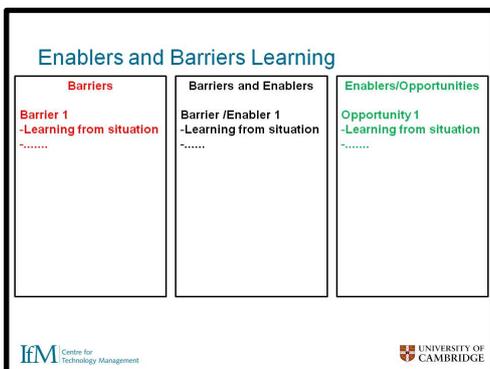


Those with a mixture of red and green dots are also identified (dyads).

These highlighted sticky notes are then reviewed in turn (a nice process is red, red and green, green) using a flip chart to understand what the barrier/enabler was, and how the organisation dealt with it.

Animated slide: Review of learning – 75 minutes

The key enablers and barriers are transferred to a flip chart and learning extracted. Working through the priority barriers/ mixed dots/ enablers by noting them on the flip chart and extracting how these were approached and what has been learned. Summarise by investigating whether learning can be adapted to the current challenges identified. This is most useful to do either working through pre-identified questions/issues listed by the company or brainstorming ideas with a flip chart. Ideally an action plan will be produced.



If this workshop is being followed by strategy development workshops or other modules, the application to current challenges may not be required.

Wrap up

- Review map
- Review of learning from enablers and barriers encountered in the past
 - how can it be applied to current challenges?
 - agreed actions.

To wrap up the map and the list are reviewed and summarised, together with the agreed action plan.

Participants will be provided with an electronic copy of the output: map and learning summary.

Appendix 3 – Organisation Scan Facilitator Checklist

Timing	Action	Responsibility
1-4 weeks before workshop	IfM-organisation discussion to clarify: Focus, scope aims Architecture – what timeframe and layers are likely to be important within the map Likely participants Venue, date and agenda	IfM
1-4 weeks before workshop	Logistic arrangements – book meeting room (with wall space, flip chart & pens, data projector), arrange catering, etc	IfM/Organisation contact – depending on venue agreed
1-2 weeks before workshop	Prepare briefing note	IfM
1-2 weeks before workshop	Circulate briefing note to participants	Organisation contact
0-1 weeks before workshop	Ensure participants are preparing sticky notes as requested – ideally collect in advance	Organisation contact
0-1 weeks before workshop	Prepare presentation with bespoke agenda Gather consumables: <ul style="list-style-type: none"> • Sharpie pens • Sticky notes • Green and red sticky dots • A0 blank sheet – or printed wall chart if architecture very clear Digital camera	IfM
Workshop	Facilitate workshop	IfM
Workshop + 1 week	Send transcribed outputs to organisation	IfM