Visual Strategy

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Visual Strategy

A ~~Workbook for~~ Strategy Mapping in
Public and Nonprofit Organizations

John M. Bryson, Fran Ackermann, and Colin Eden

Illustrations by Ramón Carr
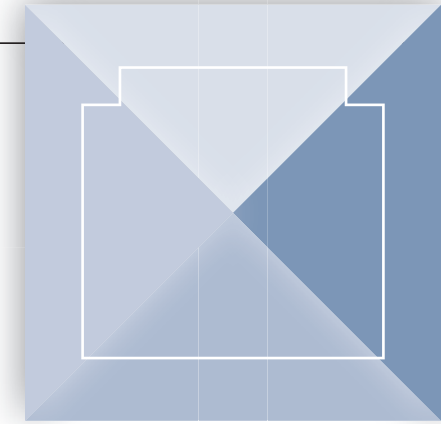
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Contents

Key to Icons

 Reference to another part of *Visual Strategy*.

 Reference to John M. Bryson (2011). *Strategic Planning for Public and Nonprofit Organizations*, 4th Edition. San Francisco: Jossey-Bass.

 Reference to Fran Ackermann and Colin Eden (2011). *Making Strategy*, 2nd Edition. Thousand Oaks, CA: SAGE.

Preface

Strategic management—that is, developing and implementing strategies designed to achieve desirable goals—is now increasingly required of most public and nonprofit organizations (see Figure P.1). These organizations therefore can benefit from techniques that produce highly effective strategies that can and will be implemented. Strategy mapping is such a technique. Indeed, strategy mapping is the most effective technique we know of for helping organizational leaders, managers, and other stakeholders (1) understand the challenges they face; (2) develop mission, goals, strategies, and actions to address them; and (3) do so in a quick and effective way.

John Bryson's *Strategic Planning for Public and Nonprofit Organizations* (4th edition, 2011) has played an important role in introducing strategic planning and management to a generation or more of students and practitioners. The book presents an overview of strategic planning and management and offers guidance on how to design and manage the process of strategy formulation and implementation. It presents strategy mapping as a major approach to strategy development, and a resource at the end includes mapping process guidelines. That resource, however, is not a workbook. Similarly, Fran Ackermann and Colin Eden's *Making Strategy: Mapping Out Strategic Success* (2nd edition, 2011) also helps readers understand how to engage in four different but related aspects of strategic management: issue management, purpose identification, achieving competitive advantage, and
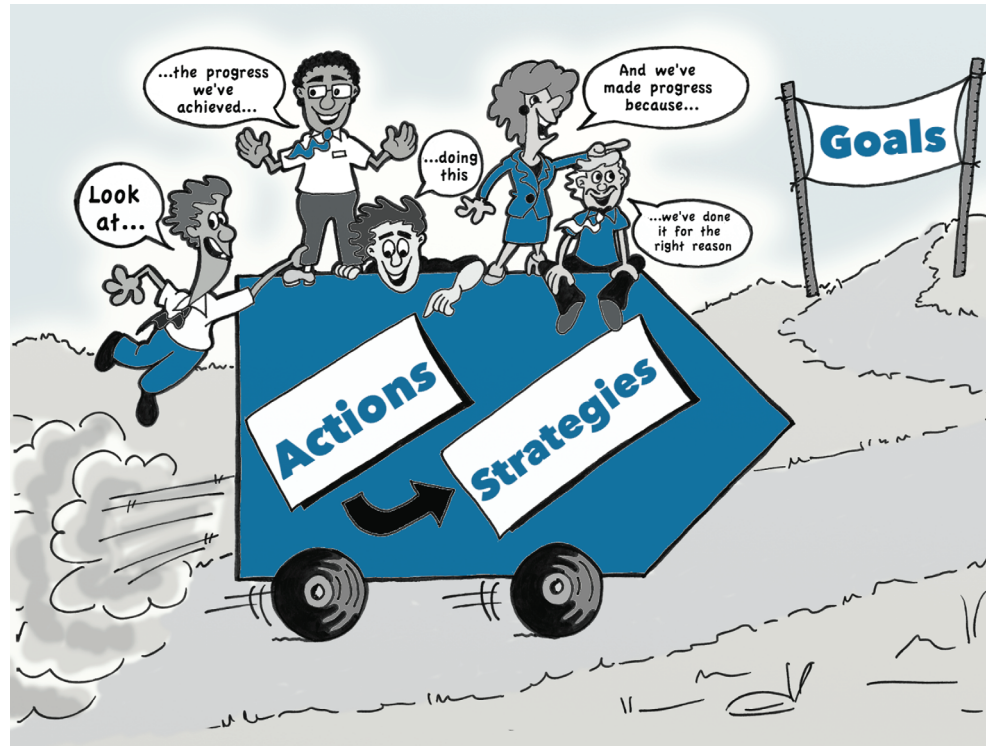
Figure P.1. Strategic Management.
Strategically managed organizations develop and implement strategies designed to achieve desirable goals.

stakeholder management. Their book also makes extensive use of strategy mapping, but it, too, is not a workbook.

Visual Strategy is meant to fill the workbook gap and is designed to help leaders, managers, and other stakeholders of public and nonprofit organizations make use of the technique we also call *visual strategy mapping (ViSM)*. ViSM is *the most powerful technique and tool we know of* for helping an individual—and especially a group—figure out what to do, how to do it, and why. (ViSM was referred to as

"action-oriented strategy mapping" in Bryson, 2011; the new name is more descriptive and is easier to say).

ViSM is a *causal mapping* process. A causal map links statements with arrows indicating how one statement leads to another. By using a few simple but important rules for formulating statements and creating links, causal maps help reveal relevant values and possible goals, strategies, actions, and underlying assumptions. The maps then help focus dialogue and deliberation on which among the possibilities actually *should* be chosen. The more deeply mappers engage, the more the maps act as a powerful vehicle for negotiating agreements that are owned by all of the group. Depending on the situation, these maps may include anywhere from two dozen to hundreds of statements.

There are several reasons why ViSM is so effective. The method helps individuals and groups

- Make sense of challenging situations involving often complex, interconnected issues
- Engage in careful, logical thinking aimed at understanding and managing complexity
- Manage the complexity involved in dealing with a large number of relevant ideas and their interconnections
- Develop answers to strategic questions that are not necessarily obvious and may result in surprising outcomes
- Explore and evaluate mission, goals, strategies, actions, and underlying assumptions
- Develop "line of sight" relationships between mission and actions
- Create shared meaning through participation and dialogue
- Facilitate negotiation and commitment to agreements about what to do, how to do it, and why
- Communicate strategies in an easily understood and acted upon way, so that implementers clearly understand what is to be done, how, and why
- Provide a vehicle for guiding, monitoring, and reviewing strategy implementation

For all these reasons, strategy mapping leads to strategy documents that are alive and on their way to being realized in practice. The developers own the strategy and do what they can to make it happen. Mapping thus leads to the opposite of many strategic planning processes—documents that sit on a shelf and are used by no one (see Figure P.2).
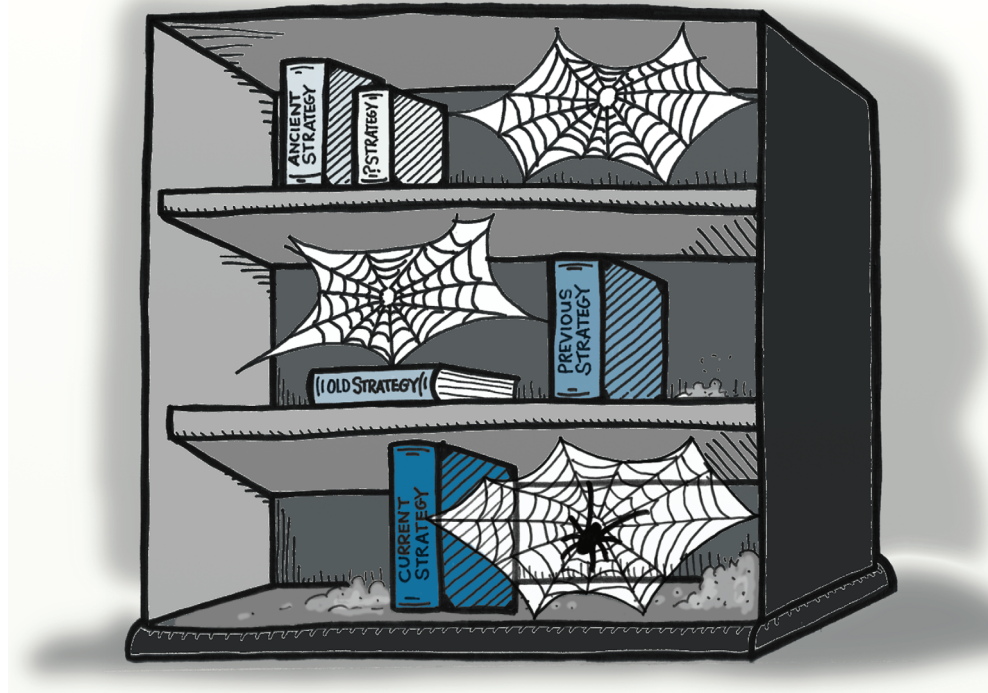
Figure P.2. The Strategy Morgue.
The strategy morgue is where lie the results of typical strategic planning sessions that do not make use of visual strategy mapping.

Purposes of the Workbook

Visual Strategy is intended to *help make public and nonprofit strategic management easier and more effective*. In addition, the workbook has a number of subsidiary purposes. Specifically, it is intended to

+ Help readers better *understand* strategic management
+ Provide readers *practical guidance* and *step-by-step* instructions in how to do strategy mapping
+ Help readers understand the *rationale* for doing strategy mapping

Offering practical guidance will include providing readers with *additional resources* at the end of the workbook:

+ A comparison of ViSM with other common kinds of mapping, such as theory of change, logic models, forward and backward mapping, balanced scorecard mapping, concept mapping, and mind mapping
+ A checklist of mapping kit items needed for a strategy-mapping session
+ Information on where to get software support
+ Supplemental reading and other resources for the reflective practitioner

The workbook thus provides added detail and practical guidance to the discussions of strategy mapping in two chapters of *Strategic Planning for Public and Nonprofit Organizations*. These are

+ Chapter 6, "Identifying Strategic Issues Facing the Organization"
+ Chapter 7, "Formulating and Adopting Strategies and Plans"

Throughout the workbook readers will find cross references to John's book, as well as to Fran and Colin's book, *Making Strategy*. These books provide much more of

the background and reasoning behind what is in this workbook, so readers who want to know more will know where to go. In addition, there are references to works by other people as well.

Audience

As noted earlier, this workbook is intended primarily for leaders, managers, planners, employees, and other stakeholders of public and nonprofit organizations. Many people

Part Three: Fran's Vignette

in business organizations are also likely to find the workbook useful either because they have a direct business relationship with public or nonprofit organizations or because they find strategy mapping generally applicable to their business. We also know from our personal and teaching experience that many people will find the workbook useful for their personal strategic planning.

The audience for *Visual Strategy* therefore includes

- Persons interested in developing strategies for their organizations (or part thereof), networks, collaborations, or communities
- Sponsors, champions, and funders of strategic planning and management processes
- Strategic planning and management consultants and process facilitators
- Teachers and students of strategic planning
- Individuals or small groups interested in developing strategies for themselves
- Evaluators of organizations, strategies, programs, or other kinds of interventions

Where This Workbook Will Be Relevant

This workbook is designed to be of use to a variety of people and groups working on developing, implementing, and evaluating strategies for

+ Public and nonprofit organizations as *whole* entities of any size. This focus may well include attention to the purposes of strategies, the issues they are meant to address, stakeholder relationships, and competences necessary to implement strategies.
+ *Parts* of public and nonprofit organizations (departments, divisions, offices, bureaus, units). Again, this focus can include attention to the purposes of strategies, issues, stakeholder relationships, and competences.
+ Personnel involved with programs, projects, business processes, and functions (such as human resources management, finance, purchasing, and information technology and management) that cross departmental lines within an organization.
+ Collaborations involving programs, projects, business processes, and services that include more than one organization (or part of an organization) in more than one sector.
+ Networks or groups of organizations focusing on cross-cutting functions or issues.
+ Communities.
+ In some cases, single individuals or small groups.

How This Workbook Facilitates Strategic Planning and Management

The workbook can help make strategy formulation, implementation, and evaluation easier in a variety of ways:

+ Readers are introduced to a powerful method (technique and tool) for developing and clarifying strategy.
+ Mapping is presented in a simple step-by-step fashion accompanied by easily understood activities the reader can practice.

- Icons are offered throughout that cross-reference other relevant parts of the workbook; point to additional useful information contained in John's *Strategic Planning for Public and Nonprofit Organizations* or Fran and Colin's *Making Strategy*; or guide the reader to other supplemental resources. Note as well that this workbook is not a substitute for John's and Fran and Colin's books, since there is more to effective strategic planning and management than strategy mapping!
- The workbook offers sponsors, champions, consultants, and facilitators a method for engaging groups in productive strategy-focused discussions that foster broad-based participation, creative contributions, logical thinking, reasoned judgments, and shared commitments.
- Users are offered a way of managing the many ideas and their interconnections that participants bring to, and produce as part of, any effective strategy-formulation process.
- Mapping fosters the kind of creativity and dialogue that often lead to eliciting surprising answers to strategic questions.
- Mapping helps clarify any confusions, misunderstandings, and conflicts and facilitates the negotiation of shared meanings and agreements about how to proceed that incorporate multiple perspectives and interests.
- The workbook helps users explore values, mission, goals, strategies, actions, and underlying assumptions and thereby helps users develop viable and effective ways to achieve important organizational purposes.
- In short, communication among participants in strategy formulation and implementation efforts is made easier by the workbook's structured approach. Tangible products emerge from completing the activities, including products necessary to develop and implement viable and effective strategies. These products help move the discussion and process along and can build support for strategic change by helping people understand clearly what is to be done, how, and why.

+ Finally, the workbook also includes detailed guidance to assist those who will facilitate groups embarking upon a strategy-mapping process.

Part Four: facilitation

Overview of the Contents

The workbook consists of four major sections:
Part One presents

+ A quick review of what strategy is and why it is important
+ An introduction to strategy mapping and the logic structure of strategy maps
+ A review of the process and content benefits of strategy mapping, which also summarizes the argument for doing strategy mapping

Part Two presents the story of one organization's use of strategy mapping to develop a strategic plan. The organization is The Loft Literary Center in Minneapolis, Minnesota, which is, as its website proclaims, "one of the nation's leading literary centers dedicated to the advancement of writers, fostering a writing community, and inspiring a passion for literature" (https://www.loft.org/). The Loft's strategic planning effort prior to the one reported on here resulted in its *2007–2012 Strategic Plan*. That process is presented in Bryson's *Strategic Planning for Public and Nonprofit Organizations*. In *Visual Strategy*, we feature the use of mapping to produce their *2013–2020 Strategic Framework*. The story has been fictionalized for instructional and confidentiality purposes. It is thus not literally true, but presents all of the essential features of a strategy-mapping exercise.

Part Three covers the key steps of doing visual strategy mapping (ViSM) in some detail. Each step includes the purpose of the step, process guidelines, and likely products and benefits. Each step is also illustrated by vignettes from real

cases. These vignettes are also in part fictionalized for instructional and confidentiality purposes, but likewise all present the truth of strategy mapping in practice. They are drawn from organizations based in the United States, the United Kingdom, and Australia.

Part Four covers strategy workshop facilitation, including the possible use of computer support, and logistics in more detail.

The workbook concludes with supplemental resources, a glossary, and references.

INSERT: "Practice instructions are also included to guide readers through the process of creating their own strategy map."

Acknowledgments

The authors are grateful to the many, many people who have helped us develop the theory and practice of mapping. There are simply too many to name! We would be remiss, however, if we did not offer particular thanks to Jocelyn Hale and all of the staff members of The Loft Literary Center for letting us use their story in the fictionalized form that works best for instructional and confidentiality purposes.

We are also quite grateful for the strong encouragement Alison Hankey, our editor at Jossey-Bass, has given to the book all along, and for the addition help of the marvelous Jossey-Bass team, including Rob Brandt, Nina Kreiden, and David Horne. Finally, we would like to thank the three anonymous reviewers of an earlier version of the book manuscript.

The Authors and Illustrator

John M. Bryson

John M. Bryson is McKnight Presidential Professor of Planning and Public Affairs at the Hubert H. Humphrey School of Public Affairs at the University of Minnesota. He works in the areas of leadership, strategic management, collaboration, and the design of engagement processes. He wrote *Strategic Planning for Public and Nonprofit Organizations*, 4th ed. (Jossey-Bass, 2011) and co-wrote with Barbara C. Crosby *Leadership for the Common Good*, 2nd ed. (Jossey-Bass, 2005). Dr. Bryson is a Fellow of the National Academy of Public Administration and received the 2011 Dwight Waldo Award from the American Society for Public Administration for "outstanding contributions to the professional literature of public administration over an extended scholarly career."

Fran Ackermann

Fran Ackermann is a professor of strategy and Dean of Research and Development at Curtin Business School, Curtin University, Perth, Australia. Her original interest was in helping groups navigate messy complex problems, which made the transition to helping support groups as they negotiate strategy a natural one (as many of the same characteristics abound in both contexts). With Colin Eden she has developed an approach to making strategy that is based on causal and cognitive mapping and supported by a computer-based group decision support system. Over the past twenty years she has worked with senior management teams in a range of organizations (public and private, national and international). With Colin Eden she wrote *Making Strategy* (1998), which detailed the approach, with subsequent editions on the practice of making strategy emerging in 2005 and 2011.
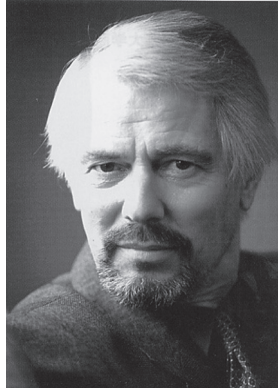
Colin Eden

Colin Eden is a professor of strategic management and management science and vice dean at Strathclyde Business School in Glasgow, Scotland. As an operational researcher he started working on problem-structuring methods in the early 1980s and published *Messing About in Problems* in 1983. This was the beginning of working with cognitive and causal maps. Causal mapping was gradually developed and introduced into the field of strategic management practice through extensive work with top management teams in public and private organizations. With Fran Ackermann he developed special software for work with causal maps and with management teams (*Decision Explorer* and *Group Explorer*). In 1998 the first edition of *Making Strategy*, written with Fran Ackermann, was published, and in 2011 the second edition introduced the outcome of research on competitive advantage and stakeholder management.

Ramón Carr

Ramón Carr is a freelance graphic facilitator and illustrator and the director of Every Picture Tells a Story. Originally from Ireland, he is now based in Glasgow, Scotland. He has twenty years of experience developing graphic-based planning tools and designing accessible information across a wide range of public sector and nonprofit organizations. He graphically represents causal maps of the kind presented in *Visual Strategy*. www.everypicturetellsastory.co

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