

Top Design Pattern	Scan the Strategic Environment	May 2009
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The Big Picture

The Action Planning Workshop

Introduction <small>Whole Group</small>	Developing Specific Action Plans <small>Teams Use the Action Planning Workbook</small>			Consensus Plenary <small>Whole Group</small>	
Preparing for Action Planning	Determining the Measurable Accomplishment	Deciding on the Specific Actions	Creating the Action Timeline	Coordinating the Groups Plans	Launching the Action Phase

Name	Scanning the Strategic Environment
Overview	<p>This Design Pattern enables the group to identify the key factors that will inform the selection of measurable accomplishments for this initiative. It involves:</p> <ul style="list-style-type: none"> ▪ Clarifying the Strategic Intent ▪ Listing Success Factors <p><i>Groups working on a single strategy will work as a whole group.</i></p> <p><i>Groups working on multiple strategies will work in teams and use the Action Planning Workbook.</i></p>
Metaphor	Like a ship captain scanning the horizon before determining the ship's specific direction
Graphic	<pre> graph LR A[Project Purpose] --> B[Strategic Environment] B --> C[Measurable Accomplishments] C --> D[Key Actions] D --> E[Action Timeline] E --> F[Coordinated Plans] </pre>
Level of thinking	Each step involves a brainstorm. The questions take the group a step deeper into the practicalities of the implementation plan.
Pattern of Collaboration	This design pattern involves generative thinking in that the group adds new ideas to the process. It is clarifying in that the group is searching for the key factors that will affect the selection of a measurable accomplishment.
Role	This design pattern clarifies the intent of the strategy and provides focus for what can and needs to be achieved within the given timeframe.
Best uses	This design pattern can be use, with some modification, as a preparation for strategy conversations. It can be used at the beginning of a strategic planning retreat. It can be used at the beginning of a workshop directly focused on developing strategies.
Do not use	It is not as helpful as a direct lead up to a vision workshop, because there is sufficient focus on the limiting factors to restrict visionary thinking.
Group size	6 – 10
Space needs	Groups working on multiple strategies will need working space so their voices do not interrupt the work of other groups.
Timeframe	20 - 30 minutes

Objectives

Rational Aim	Identify the key factors that will inform the selection of measurable accomplishments for this initiative
Experiential Aim	A feeling that the group has an appropriate grasp of it's strategic situation.
Product	<ul style="list-style-type: none"> ▪ Statement of purpose ▪ Statement of intended results ▪ List of environmental factors affecting implementation
Script	
Context	This is the first step of the Action Planning process. It involves clarifying the strategic intent of the initiative and listing the factors that will help make the initiative a success. It is important to be as specific and real as possible.
<p>Scan the Strategic Environment Begin by writing the name of the strategy on the top line of the worksheet for clarity of focus and later reference.</p> <p>Clarify the strategic intent – page 1 - #3 and #4</p> <ul style="list-style-type: none"> ▪ What is the purpose of this initiative? What is it design to accomplish? How is it related to other strategies? <p>A few clear ideas will surface quickly. A long discussion is only necessary if the group is quite unclear on the purpose or is sharply divided. Secondary questions to help the group include, "What is our intention?", "What do we really need to achieve?" and Why are we doing this?"</p> <ul style="list-style-type: none"> ▪ What results are needed? What are the tangible benefits of this strategy. <p>This is a short brainstorm and does not need to be resolved to a single statement. It is important to be specific at this point.</p> <p>List success factors - page 1 - #5 - #8</p> <ul style="list-style-type: none"> ▪ Strengths of the organization that are the group can use toward successful implementation. ▪ Weaknesses of the group or organization that can hinder or limit success in implementation ▪ Opportunities related to the initiative that can aid implementation ▪ Threats,dangers or risks that can hinder implementation. 	
Groundrules	Be specific, be intuitive and work quickly.

Using this design pattern in a face to face environment	
Materials	<ul style="list-style-type: none"> ▪ An Action Planning Workbook for each person. ▪ A flip chart and markers are very helpful if the group is larger than 5 – 6 people. ▪ A small group can work directly with the Workbook.
Preparation	<p>Read through the procedures Assign a “scribe.”</p>
Challenges	<p>Discussing purpose and listing success factors involves quick, intuitive brainstorming. It is easy to get trapped in long discussions, because it is fascinating. The intent is to surface the clearest, most relevant elements that describe the implementation environment.</p>
Tips	<p>It is necessary to bring some clarity and focus to the purpose and intended results. It is not necessary at all to bring conclusion to the success factors. It may be helpful to highlight factors that seem extraordinary in their power to affect the initiative; those that must be given primary consideration. The group will likely discover additional factors as the discussion continues.</p> <p>One person needs to be designated as the “scribe” for each strategy. That person will document the conclusions of the group for each step in the process. This Workbook will be the complete record of the group's work and will be used to document the whole action plan. It can also be used for future reference when the group reviews and modifies its plans during the actual implementation phase.</p>
Modifications	<p>Any modifications to this design pattern would be made in order to make the questions appropriate to the scope of the inquiry. At the highest level, for example, the questions of purpose and intent would be more related to the overall organizational purpose.</p>
Using this design pattern in a virtual environment	
Virtual Tools	
Modifications	
Preparation	
Challenges	
Tips	
Example	