



OPERATIONALIZING SYSTEMS THINKING ON ONE PAGE

BY BRIAN HINKEN

It is always a thrill to gain new insights after applying systems thinking to a problem situation. Imagine a team that is exhilarated from having “gone deep” into the issue by drawing causal loop diagrams, using computer simulations, or applying the events-pattern-structure framework. They then come back up to the surface of reality with a big breath: “Wow, that was great! Why didn’t we see that before? We’re finally going to get unstuck!” But as their satisfaction settles in, they begin to face the prospect of *doing something* with their new insight. “Now, what do we do? This is fascinating stuff, but how do we take action on it? How do we implement it?”

This is the point where a strategic action map is particularly useful. At Gerber Memorial Health Services (GMHS), we use strategic action maps (which we call “process maps”) with almost all of our significant change initiatives. Even our CFO, who loved seeing complex processes organized into lists of bullet points, now calls for the use of strategic action maps whenever we’re developing a new strategy.

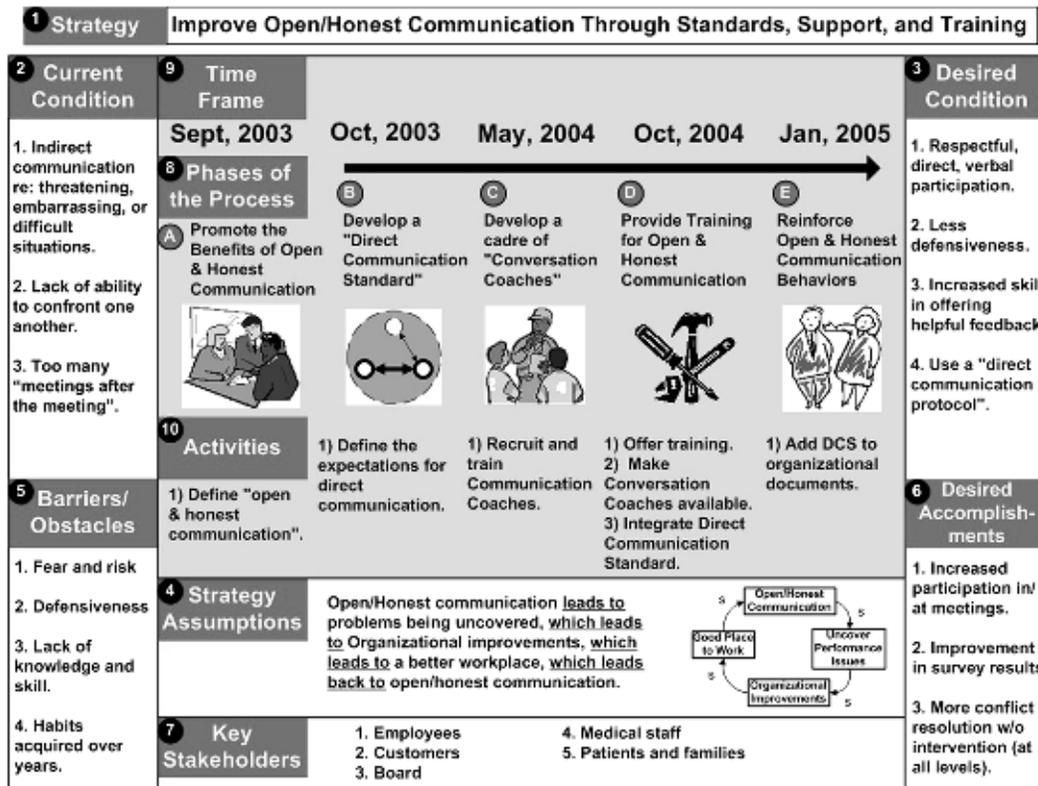
The Strategic Action Map

A strategic action map is a tool that helps teams think through, articulate,

and implement high-leverage action strategies. It could be called a double-loop strategy development tool, because it forces teams to go beyond seeking solutions *within* their current framework to take actions *on* that framework (for more about double-loop learning in teams, see “Working in High-Leverage Zones with the Double-Loop Learning Matrix” in *The Systems Thinker*, V12N8).

In “Example of a Strategic Action Map,” notice that the gray portion in the middle (steps 8, 9, and 10) contains only three elements: phases, activities, and a timeframe. This is where the action is specified and

EXAMPLE OF A STRATEGIC ACTION MAP



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progress is tracked. Notice also that this section contains pictures, for a little right-brain reinforcement of each item. Now, look at the surrounding areas of the map (steps 1-7). These sections literally frame the action portion of the map. This is where the framework, or basis, for the action is made explicit. When someone asks, “*What* are you planning to do?” you can show them the center of the map. When they ask, “*Why* are you doing that?” you can refer them to the frame around that action.

The map summarizes the following information: “We intend to go from our current condition (2) to our desired condition (3) by operationalizing the strategy (1) listed at the top of the page, and this is why we think this strategy will work (4). We have named the barriers we must overcome (5), we know what ‘success’ will look like (6), and we have considered the perspective of key stakeholders (7). What we will actually *do* is specified by the phases (8), timeframes (9), and activities (10).” Isn’t this the very stuff that a board of directors or leadership team would expect to know?

The Power of the Map

A strategic action map incorporates several of the organizational learning disciplines. It encompasses *systems thinking* by taking into account the “big picture” and the interests of key stakeholders throughout the system. It includes *shared vision* by establishing creative tension between our vision (desired condition) and our current reality (current condition). Additionally, a strategic action map supports *team learning*. Because teams complete the map together, members must make their assumptions about the change process explicit: Why are we trying *this* strategy, and what are we trying to create—*really*?

Because a strategic action map is more of a conversation facilitation tool than a precision planning tool, it is not a substitute for project management tools. However, we have found that, as a result of the high-quality conversation that this tool generates and the

visual way in which the information is presented, we have less of a need for a deadline-driven tracking system. The work just seems to get done because of the high levels of synergy and alignment that creating the strategic action map as a group engender.

Completing the Map

As a first step for completing a strategic action map, the project team must analyze the problem situation and discover some new insights for addressing it. Team members then ask themselves specific questions at each of the 10 steps and enter the answers into a blank process map (you can easily create a template using Microsoft Visio or some other business drawing software package). A facilitator is usually helpful in guiding a group through the process.

1. Strategy. What is the goal and how do we intend to achieve it? Naming the “how” is the same as naming your strategy for this change initiative.

2. Current Condition. What is the current condition of the goal? What symptoms are you seeing? What data do you have? A little soul-searching goes a long way here. If a team has not already done so, developing causal loop diagrams at this point is helpful in describing “what is.”

3. Desired Condition. What is the desired condition of the goal? What is your vision for this change initiative? Notice that the team has just established creative tension by juxtaposing the current condition with the desired condition.

4. Strategy Assumptions. What leads you to believe that this change initiative will work? What has been tried in the past and why didn’t it work? Why do you even want this goal? This is where you test the strategy you have named in step 1. You must define clear reasons why you selected this strategy, so you can defend it when others ask you about it. Test the validity of the assumptions by asking questions such as: How often is this assumption true? When would this assumption not be true? What are some examples? Does anyone see it any differently?

5. Barriers/Obstacles. What barriers must we overcome for this change initiative to be successful? What are we up against?

6. Desired Accomplishments. How will we know that we have achieved the desired condition? What measurable outcomes will we see?

7. Key Stakeholders. What groups are affected by this change initiative? Whose view do we need to consider?

8. Phases of the Process. What phases (groups of activities) must we go through to move from the current condition to the desired condition? Add a symbol to represent each separate phase.

9. Timeframe. What are the dates by which each phase must be completed?

10. Activities. What specific actions or events must occur during each of the phases for them to be completed successfully?

Strategic Action Maps in Action

At GMHS, we develop strategic action maps for our organization-wide initiatives, as well as for smaller projects. We create our diagrams over the course of several meetings, refining and changing them as our thoughts percolate. The team that completes the map shares it with other associates to track progress, communicate action strategies, and induce further learning.

As an organization, we have found many of the mainstream business tools to be “too hard,” in that they fail to take into account the insights that emerge when participants compare their mental models. We have also found some of the organizational learning tools to be “too soft,” in that they don’t integrate enough measurement and concrete action steps. So, we have developed this hybrid tool that we think encourages insight for action—a way to operationalize our systems thinking all on one page. ■

Brian Hinken (bhinken@gmhs.org) is the Organizational Development Facilitator for Gerber Memorial Health Services, a progressive rural health system in Fremont, MI.