

STRATEGY



Making Strategic Moves in Uncertain Times

Developed by:



MitOst

Supported by:



The Pocket Lab format was developed by members of the Civil Society Toolbox core team as a collaboration effort between SOCIUS Organisationsberatung gGmbH and MitOst e.V. with funding support of the IAC/ Bosch Alumni Network.

Three basic ideas make this Lab:

1 Strategic Moves instead of a Masterplan

The Lab is deliberately not designed as a one-off development session for a "Grand Strategy", but rather as a regular exercise in continuous "Strategizing". Borrowing from the agile strategy approach, each Strategy Pocket Lab Session (to be conducted on a quarterly basis or more frequent) represents a move towards a more favorable strategic position. A shared compass (a vision or purpose statement) is a prerequisite for this process to avoid agile mission drift. Like in a game of chess, the moves are inspired by this bigger picture, but are taken in synch with internal and external developments. A strategic roadmap is allowed to emerge as a dynamic pattern over a progression of strategizing moves.

2 Adaptation and Transformation

Traditionally, Scenario Planning explores possible future developments in the light of the question how we can successfully adapt to these different futures. Adaptive planning is no doubt more suitable to contemporary environments than an old school Long Range Plan; however, it neglects the possibility of actively influencing and thus transforming the future. Borrowing on Adam Kahane's ideas about Transformative Scenario planning, the Strategy Pocket Lab includes the question of how we can influence the factors driving future scenarios and thus contribute to the most favorable future. Knowing that such a transformative effort takes time and starts with rebuilding our own posture and way of relating, a pocket format hardly seems adequate for this aspiration. The transformative stance thus needs to become part of the overall strategizing approach. If it is allowed to breathe alongside the adaptive stance, it will unfold its power over time.

3 Bias towards Opportunity and Action

The Lab Process includes multiple quick cycles of exploration and convergence and is designed to effect a commitment for joint action. Each Session ends with a clear decision on the next strategic move within a defined focus area. While the core mechanics build on the Critical Uncertainties Method (Liberating Structures), the critical link between scenario exploration and strategic action is strengthened. The moves are taken with an opportunity driven approach: which chances can we move towards? Which windows of opportunity can we seize?

Strategy Pocket Lab

Making Strategic Moves in Uncertain Times

The VUCA (Volatility / Uncertainty / Complexity / Ambiguity) reality did not come into the world just yesterday, but the borderline experience between complexity and chaos of the Corona Universe makes it quite tangible. The experience triggers contradictory reactions - on the one hand, delusions of control, on the other, surrender to fate. Neither seems particularly helpful in the current situation: we need to look forward with an open mind, but at the same time need to passionately shape the future. We need to have a plot but be radically open to adapt.

The Strategy Pocket Lab presents a compact strategy format that combines elements of the Liberating Structures Collection (K. McCandless and H. Lipmanowicz), Transformative Scenario Planning (A. Kahane) and the Opportunity-Driven Development Approach (P. Skat-Rørdam). In a half-day workshop, a development need is profiled, critical uncertainties and relevant environmental scenarios are examined and the next strategic "move" is derived.

READ MORE:

Find out more about VUCA in the Civil Society Toolbox, Background Paper (14) "VUCA".
Find out more: www.civilsocietytoolbox.org

WHO SHOULD ATTEND?

Strategy is best crafted with all minds in the game. It should not be a closed curtain boardroom routine or a lonely leadership exercise. Of course, any meeting has an optimal range of participants.

For the Strategy Pocket Lab we deem the perfect group size to be 7-15 persons, representing perspectives across the entire organization, including program staff, management and board members. If your team consists of 15 people, bring them all. If you are 30, mandate a delegate strategy circle.

MATERIALS YOU WILL NEED

- Flip Chart
- Markers
- Moderation Cards or Post its (in different colors)
- Figures or sticky dots for voting (in 2 different colors)

If you are working digitally

- Find a set of Miro templates provided by Pocket Lab team here:
https://miro.com/app/board/o9J_JZqja6E=

PREPARATION

Which field needs our attention?

A rough framing of the area of strategic development to be addressed should be made in a preparation meeting **before the Session**. Focus on recurring issues that show up in meetings and workflows and are too big to tackle in the day to day routine. Identify patters of tensions that mark the need for a strategic change of direction. It can be fruitful to focus on interface areas, i.e. fields in which the organization operates in direct contact with its environment, such as Fundraising, Community Partnerships or Programme Development, but any function or area of concern may be selected.

If more than one focus field is on the table, rank them according to the question: ***“Which issue has energy and needs our attention now?”***

Mandate a **2 person hosting team** for the Strategy Pocket Lab Session. The hosting team will prepare the Lab and facilitate the Session flow. They will be able to take part in the content discussions but will need to be very transparent with their role switches between participant and facilitator!

online TIPS & TRICKS

- 1.** When you facilitate a team online, along with the facilitator’s role have also a “tech” focus person!
- 2.** Prefer to use an online meeting platform that features breakout rooms!
- 3.** It will be easier for the hosting team to facilitate the process if they prepare their “flip charts” according to the flow of the Lab. Take a look at the set of online Miro templates that this Lab offers to navigate!
- 4.** When using Miro, allow participants to get familiar and navigate with the board for a while.
- 5.** Always start your Lab with a check-in, it gives the participants time to synchronize their energy and come together! Don’t forget to use online energizers / collective fun movement in front of the screen and always check if and when the team needs a break.

SOURCE READINGS:

Keith McCandless and Henri Lipmanowicz (2014): The Surprising Power of Liberating Structures: Simple Rules to Unleash A Culture of Innovation

Adam Kahane (2015): Transformative Scenario Planning: Working Together to Change the Future

Peter Skat-Rørdam (1999): Changing Strategic Direction. Practical Insights into Opportunity Driven Business Development

1

FOCUS ASSESSMENT

What is and what could be going on?

After a quick **check in**, start the Session with **a round of perspectives on the framed issue / area of development**:

Why does this field need our attention at this moment?

What should be our objective of strategizing? (solving a particular problem, coordinating processes, seizing an opportunity, regaining momentum...)

Visualize and cluster the statements from the group. If possible, converge on an objective statement [30']

Break out into Triads and give each person 5 minutes to speak: What is the highest potential of this field? What's the most exciting future state we can imagine in regards to the focus area? **Select 1-2 pictures that represent the common ideas in each group.** Share. [30']



Take a small break!

2

SYSTEMIC ANALYSIS

What are our Critical Uncertainties?

Brainstorm factors that have a critical impact your chosen field of development. A draft list may already be assembled by the preparation team to be furthered in the session. Alternatively the factors can be collected in a plenary exchange after a short moment of individual brainstorming.

Use factors from several of the STEP categories (socio-cultural factors, technological factors, economic factors and political factors). Make sure the factors are not too broad and not too general (i.e. instead of the state of the "Global Economy", a more focused factor may be the situation of businesses in your state or district.). You may also include factors internal to the organization (such as team growth or stress level). [20']

Select two factors that are at the same time highly unpredictable and have a high impact on your work and the focus area (in the language of Liberating Structures these are "Critical Uncertainties"). Each person may place 2 figures on fields they deem to be Critical Uncertainties. The two highest ranked factors are chosen to build the scenario grid. If the two factors are too similar, the scenarios will not be so diverse. In this case take the third or fourth ranked factor as an alternative. [20']



Build the scenario grid: First, identify a meaningful polarity of possible states for the two selected factors (usually, “high-low” is a good start, sometimes other categories may apply better. For example, the state policy in response to COVID 19 could be described as “high vs. low regulation” or “restrictive vs. permissive”).

Assemble the two factors as the axes of a grid, framing four quadrants with all combinations of high-low scenarios for the two factors. Now, every team member is invited to **vote** by placing one dot (or figure) on the position in the grid that represents their perception of the current reality and one in another color that represents the most likely development in 6-12 months! (The time horizon for the scenario development may be chosen freely, to work with the Pocket Lab approach, **stay below the classic 3-5 year horizons**). Take a moment to discuss the assessments. Check if there is a shared understanding of the factors and scenarios. [20’]



Take a small break!

3 SCENARIO EXPLORATION

What Lies Ahead?

All quadrants with dots/figures indicating possible future scenarios are now taken into further examination (if only two quadrants were indicated, form two scenario working groups. If the assessments are spread across all four quadrants, build four working groups. If all dots/figures are in only one quadrant - an indicator that the factors may not have been so uncertain after all - chose two additional quadrants simply for reasons of scenario contrast). In the working groups address the following questions, again with the 6-12 months (or further) horizon in mind:

Scenario Description: What will our operating environment look like in this scenario? What is happening? What do we and the people we interact with experience? (try not to paint a black & white picture, even if the polarities of the factors sometimes indicate best case and worst case scenarios. Explore the grey areas. Explore the good in the ugly and the ugly in the good). Finally, give the scenario a poetic title (for example, think of a film or book title). Add pictures that represent your thoughts and give texture to the scenario description. [20’]

Strategic Options: How does this impact our work and what can we do to be prepared for the opportunities and risks in this scenario? What do we need to do to adapt to this future? What can we do to contribute to the better aspects in this scenario? [20’]

Share the Scenario Descriptions and Strategic Options. Invite some resonance after each presentation. Finally, take a few minutes of silence and individual reflection to sit with the scenarios. What touched you, what made you curious, what did you realize? What does it mean for the development objective you defined? [20’]



Take a small break!

4

STRATEGIC ACTION

What is our Next Move?

Form mixed groups with representation from all scenario groups.

Discuss possible strategic moves that make sense across the different scenarios.

What are the biggest risks to hedge against? What are the biggest opportunities to prepare for?

What do we need to do to get better at seizing these opportunities?

What is the most sensible move to reach our development objective? [20']

Present the Proposals and **rate the options** with two "currencies" (2 dots per person for each color):

● green dots/figures = Strategy Points: "This move/action will feed our objective".

● red dots/figures = Passion Points: "I am ready to give energy to this move/action".

Identify the overlap: Which moves/actions have both, strategy and passion points?

Agree on the move and designate a working group / task force to prepare the necessary actions. [20']

Celebrate and **check out** with a round of toasts to the Golden Future.

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In case you want to print Pocket Lab for your team, we advice you set your printer to print in low ink usage or in low quality.