

CLARITYTOOLS



EXECUTIVE WORKSHOP
APPROACHES TO FOSTERING
COLLABORATION AND
ENGAGEMENT USING
VISUALIZATION

THE BIG IDEA

While eighty percent of CEOs believe their corporate vision is clear, well understood and consistently acted upon, only twenty percent of leadership teams believe their CEO's vision is clear, focused and worthwhile. The problem: lack of clarity.

Clarity is becoming a core competitive capability. The capacity to represent the evolving challenges and opportunities as well as the persistent vision and strategy in ways that engages teams determines success. With business becoming faster and more complex, getting to clarity is even more vital.

The good news is creative industries and brain research are teaching us a simple better way to create clarity: bring business back to its senses by making the intangible tangible.

1

VISUAL THINKING CLARIFIES BUSINESS MODELS

According to Alan Kay, Apple Fellow, visualization adds eighty IQ points. The act of creating diagrams that accurately represent the elements and dynamics of business helps teams understand situations as comprehensive systems. Clear pictures reflect clear thinking.

MAKE STRATEGY VISIBLE.

2

VISUAL COLLABORATION PROMOTES DEEPER TEAM ENGAGEMENT

Teams cut through clutter, complexity and confusion when they build diagrams together. The collaborative act encourages the right conversations to happen at the right time: teams see alternatives and complementary points of view.

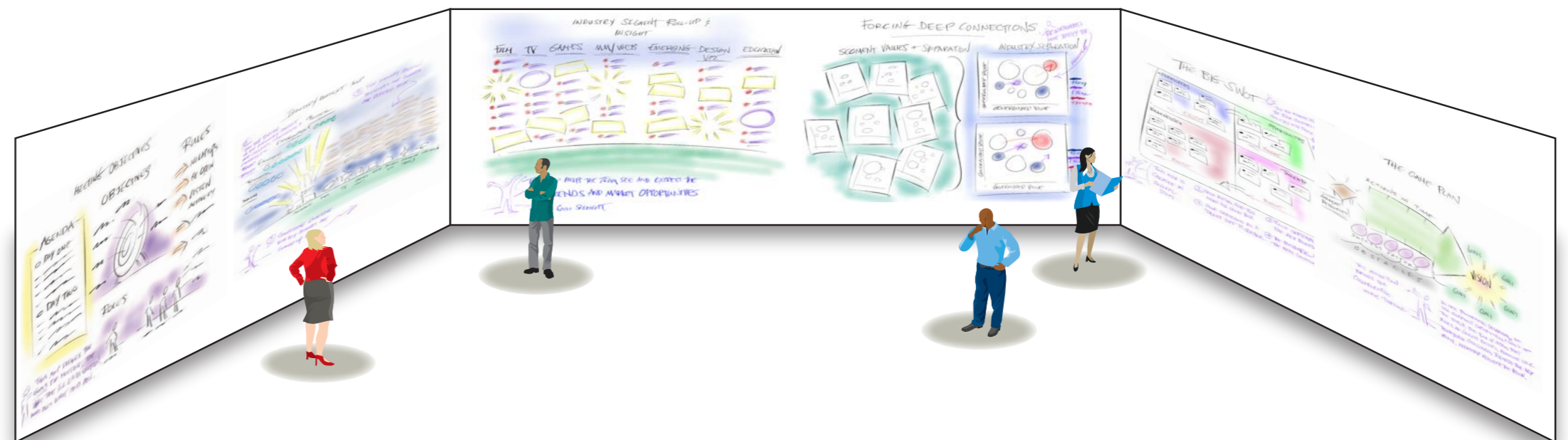
BUILD PLANS COLLABORATIVELY.

3

VISUAL DECISION-MAKING CREATES ALIGNMENT

Panoramic displays increase team engagement by creating a form of group memory: seeing the history of a discussion encourages systems thinking. The physical representation is a form of collaboration as the physical placement of a graphic is a statement of a decision.

REPRESENT DECISIONS PHYSICALLY



BUSINESS VISUALIZED

Business visualization is an science as well as an art. The fundamental principle is to convert mental and business models held into visual models - diagrams that can be worked, interrogated, developed and reworked. The result: a shared understanding of where the business is, when it can go, and what to do to get it there.

The process can begin anywhere. From a bottom up approach of assembling components to represent a complex business situation, to a top down 'fill in the map', visualization helps teams conceive of their challenges as whole systems of relationships, patterns and dependancies.

Different maps encourage different points of view. The more effectively teams integrate and synthesize these perspectives, the more complete their thinking becomes.

1 REPRESENT THE COMPONENTS

If something can't be illustrated, it can't be measured. Translating business concepts into simple, easy to understand diagrams engages our brains in ways that words cannot. Think of these components as lego blocks that can be combined into simple and sophisticated models.



WHO

The customers, clients, stakeholders, partners, board members, influencers that have a stake in your business.



WHAT

The physical and virtual products, components, documentation, services that constitute your value creation.



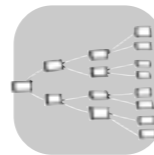
WHERE

The locations where business is conducted - from global distribution to office layout to conceptual spaces.



WHEN

The times and durations in which business takes place - measured in moments, months and lifetimes.



WHY

The forces that drive business activities and relationships, often visualized as flow diagrams.



HOW

The steps that make up business cycles from broad elements to simple ones.



HOW MANY

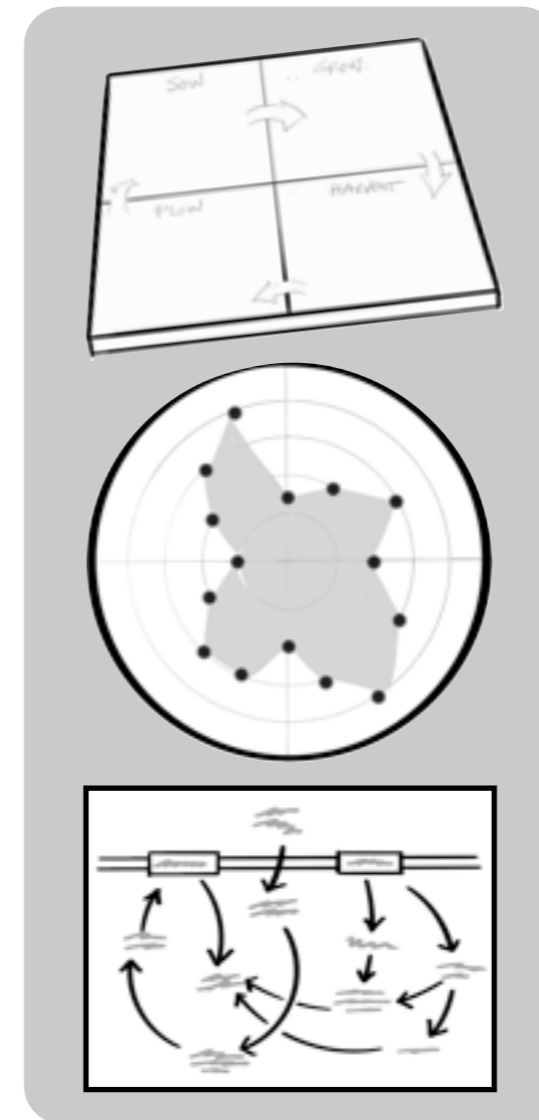
The quantities and amounts: purchase price, customers demographics and much more.

2 COMBINE INTO WHOLE SYSTEMS

Business models are descriptions of how business create, exchange and capture value. As diagrams, business models represent the flow of capital, opportunity, risk and activity through an organization. When collaboratively created, teams get the big picture.

MAPS CREATE FRAMES OF REFERENCE

A vast range of diagrams establish a vast range of lenses into different aspects of business, from the most abstract strategies to the simplest tasks.



3 CLARIFY, UNDERSTAND, DECIDE, ACT

The real value of business visualization is how diagrams provide a clear user interface for group discussion, problem solving, free-form brainstorming, planning, strategic discussion, and innovation. The diagram itself is only part of the value. It's the discussion and analysis that makes it worthwhile.

SOLO VISUAL THINKING

Use these maps as tools to privately doodle, think though, explore, write out and draw out your ideas to see what you think.



TEAM FULL ENGAGEMENT

Use maps as a way to gather points of view from your team. Start with incomplete maps and let others fill them in with their ideas. Make them large.



ORGANIZATIONAL CLARITY

When built to a sufficient level of accuracy and fidelity, used finished maps to describe context, strategy and choices.



BUSINESS TRENDS

What's driving your business? Which trends propel growth and which restrict it? How do the combination of these drivers operate together as a complete, interconnected system?

Every business operates within a complex environment of rising and falling markets, skittish customer impulses, and transformative technologies that shape production, service, distribution and reputation. All business are constrained by the physical and legal environments.

Creating a clear picture of these broad influences can clarify the broad environment and define broad opportunities and risks.

- 1 Select categories relevant to your business. Consider universal drivers in society, technology, environment, economy, policy as well as those specific to your industry and to the nature of the problems you're tackling.
- 2 Place your business in the center of the business trend map.
- 3 Brainstorm factors within each category specifically identifying those that are:
 - *growing* (say, number of twitter users)
 - *shrinking* (use of tellers)
 - reached a *milestone* (level of trust)Identify and chart measurable, reliable data.
- 4 Then consider the implications of these drivers. Which are the most vital to your business.
- 5 Conclude the most important factors and how they will influence your business.

SOCIETY

How is society changing? What trends do you see in people's behaviors, values and beliefs? What changes in culture are relevant to your business? Why?

TECHNOLOGY

What technologies are driving your industry? Which are growing? By how much? Which are declining? How may some technologies potentially disrupt industries?

ENVIRONMENT

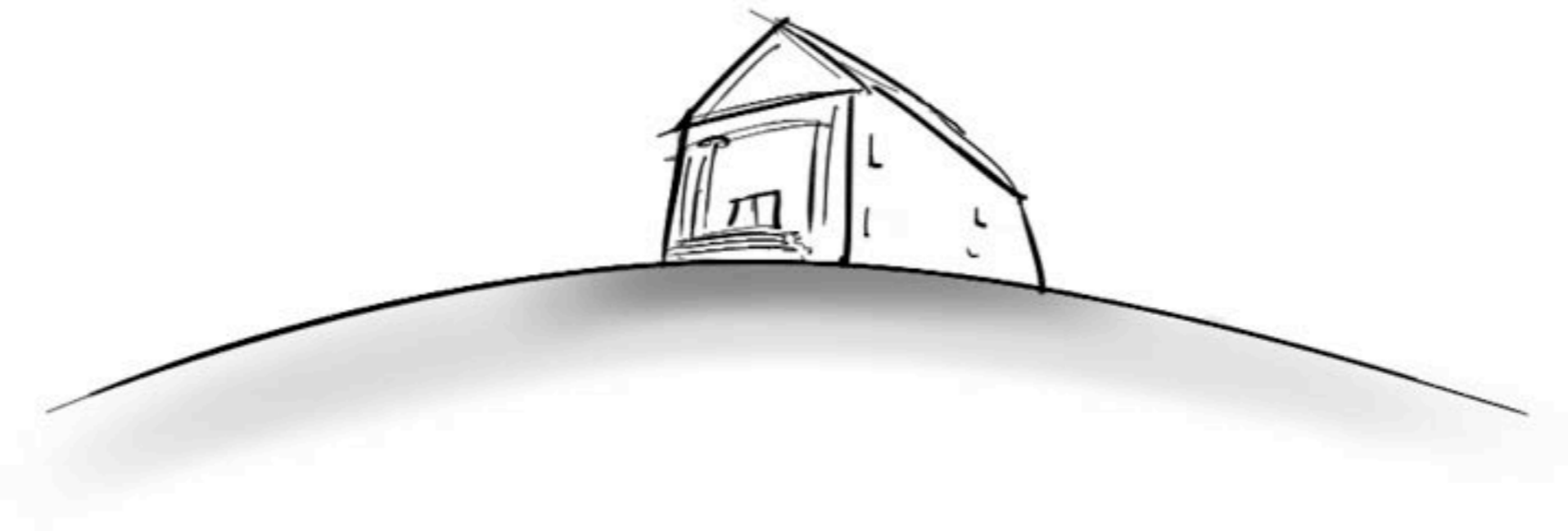
Describe the impact of changes in the physical environment of your business. From local living conditions to global changes, environments shape growth and decline.

ECONOMY

What is the state of the economy? Locally. Regionally. Nationally. Globally. How does the economic climate affect the business of your suppliers, customers, employees?

POLICY

Describe the policies, laws and regulations relevant to your business. What new regulations will augment or constrain business?



WHAT DO THESE MEAN?

So what? What impact do these changes have on your business now and in the future? What will they mean for your strategy to thrive and protect your business?

TIPS:

Ensure that these elements are clear within elements

CUSTOMER INSIGHT

Who is your customer and what do they really want? What do they think about, feel, and do? How do they really view and interact with your business?

Creating a visual persona is more than just finding a picture of your target customers. It's an exercise in identifying the real person and understanding their mindset, attitudes, goals, fears and expectations.

Representing these characteristic visually makes the person real in a way that just talking about them generally doesn't. The value: a clear representation establishes the target for your value proposition.

- 1 Identify the customers based on detailed demographic studies as well as your experiences and gut instinct.
- 2 Place your customer at the center of a tableau and map the elements that are relevant to your business. General include general thoughts about money, fashion, home, past experiences - what is relevant to their experience of your organization.
- 3 Identify opportunities from the person's hopes, desires, patterns of behavior.
- 4 Clarify the opportunities for creating new value.

HOPES

What does this person want to achieve today, tomorrow and beyond?

FEARS

What does this person fear in their financial life? What are they avoiding? Hiding?

MONEY

What is this person's relationship with money? What do they hope for and what do they fear? How sophisticated are they with their finances?

LIFE STAGE

Where is the person in their stage of life? Are they at the early stages of acquiring wealth or at the later stages of building and giving away assets?

ASSETS

How does this person gather assets? What is their net worth and capacity to generate money?

COMPANY RELATIONSHIP

What is this person's experiences with your organization? What would they want to say to you? What would you want to say back?



WHAT DO THESE MEAN?

So what? What impact do the state of the person have on your business? Where can you add value? Where should you mitigate risk?

CUSTOMER JOURNEY

Imagine your organization's services as a movie. What experiences do customers have with from start to finish? How would you describe the move

Services are the interactions your customers have with your organization over the course of a moment, day and lifetime. Service design thinking represents the customer journey as a storyboard, a series of pictures illustrating the customer touch-points and interactions which can be analyzed, enhanced and acted upon.

- 1 Identify the main touch points in your customer experiences - from the earliest awareness through marketing and PR efforts, through a presence on web and social media to work of mouth. What expectations are the customers building?
- 2 Identify the key transactions directly with your organization. What do they really see, hear, touch - and how does that make them feel?
- 3 Map out the 'swim lanes of activity' from abstract to tangible. Identify the problem areas. What isn't working?
- 4 Identify any opportunities - adding, removing, changing the nature of touch points to enhance customer experiences. .
- 5 Select the most important factors and how they will influence your business.



CUSTOMER EXPERIENCES

INTENT

What does your customer want to achieve at each step?

EXPERIENCE

What actually happens at each step.



ARTIFACTS

What does the customer physically touch, see, hear or encounter?

PEOPLE

Who from your institution interacts with the customer?

MANAGEMENT

Who from your institution manages the experience?

SYSTEMS

What systems support the interactions?

DO DIFFERENTLY

What could your institution do differently to improve customer experience?

VALUE PROPOSITION

Fostering clarity for your organization's long term direction is a precise and vitally important operation. It establishes the driving purpose that engages and galvanizes your team.

A company vision is closely related to its essential value proposition. A value proposition must clearly identify your intended customers, their needs and problems to be solved, as well as the essential value of your products and services.

It must also define your competitors - of all kinds - and describe how your offering is better.

Without this clarity, teams will lack a shared general context for broad decision-making.

FOR

your intended customers (be specific and precise)

WHO

have the following needs, problems to be solved and issues to address

THE

name of your institution, division, product or service

IS A

kind of entity (describe the kind of service it offers)

THAT

provides the following values to our customers (list at least three in order).

UNLIKE

the alternatives and competition (identify them specifically)

WE

provide the following benefits and differentiators.

VALUE PROPOSITION

Have each person on your team write out their idea for the company, product, service vision on a series of sticky notes, one phrase on one sticky note.

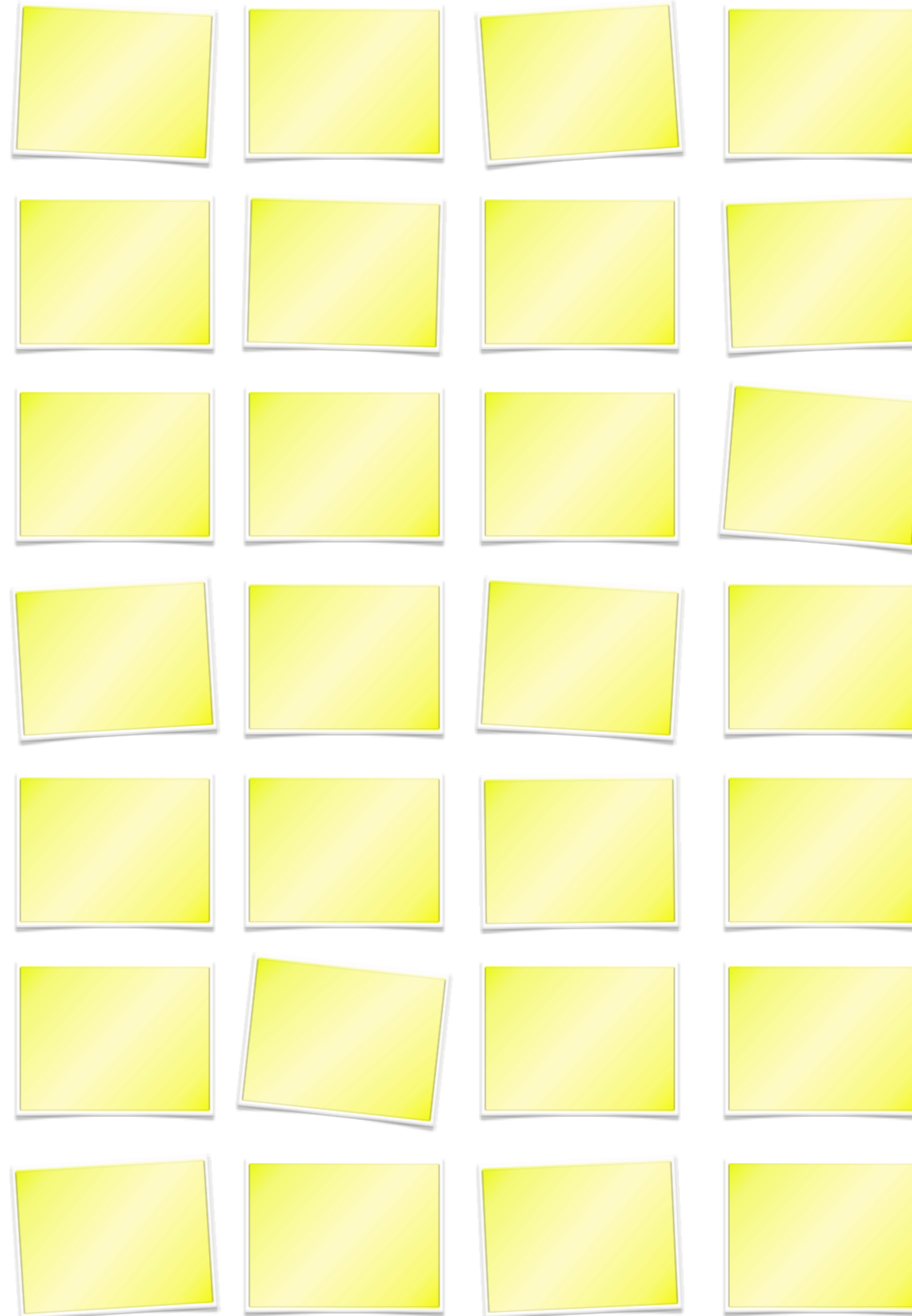
Once complete, arrange the notes vertically so the first person's vision reads down the first column, and the second person's on the second. And so on.

Then read the notes across rows, comparing and contrasting ideas, level of detail and areas of emphasis.

Next, move the best notes on each row to the left, working and refining until the team produces a 75% accurate and inspirational vision.

Subteams can develop and refine the vision from that point.

FOR
WHO
THE
IS A
THAT
UNLIKE
WE



STRATEGIC INTENT

Every business operates with limited resources, dilemmas and tradeoffs. Clarifying options and understanding implications of those options is the essential activity of clarifying strategic intent.

The classic tool for strategic analysis is the 2x2 matrix. Over 350 versions have been published in business literature over the past four decades.

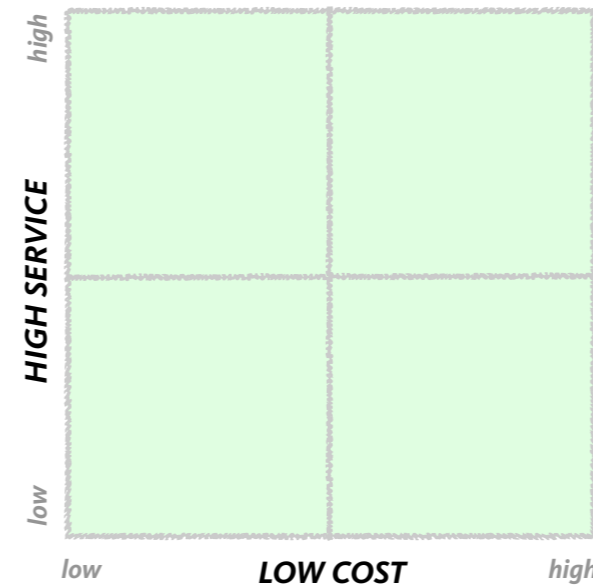
Among the most popular, effective and easy to use are those that chart out core customer needs, competitive positions and SWOT.

The key to using these diagrams is to select the complementary axis which produces four strategically different quadrants.



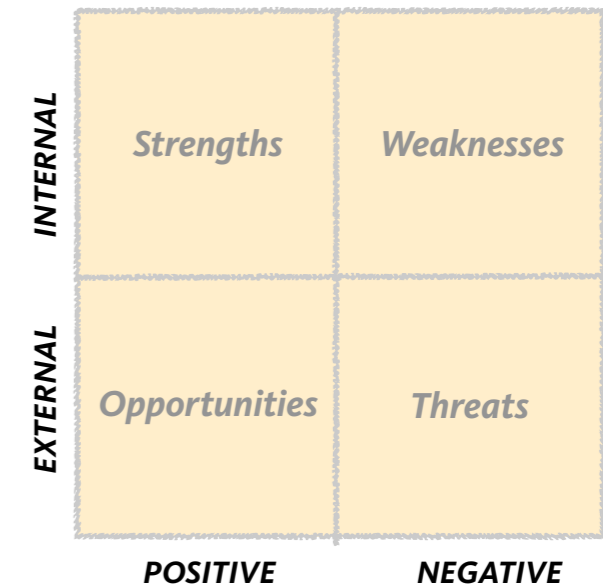
CUSTOMER NEEDS

Identify complementary aspects of customers - financial, emotional, risk tolerance - and map out the market segments. Chart how your competitive serve the customers and if blue oceans exist.



COMPETITIVE CAPABILITIES

Identify the key marketed and genuine capabilities of the industry players - size, depth of offering, customer relationships. Map the competitors on the chart and clarify where your organization sits, where you'd like to be, and how the competitors will respond.



SWOT ANALYSIS

The SWOT analysis provides a comprehensive look at your organizations capabilities internally as well as within the larger market place. Thoughtful analysis can leads to an insight for a plan that maximizes customer value in the competitive landscape that leverages your organizations strengths.

CHANGE MANAGEMENT

Teams work more effectively when they possess clear shared right frames of reference with which establish contexts for their decisions and actions.

Team engagement increases when they are provided with broad and specific context and room to solve problems.

Use this conceptual checklist to deliver important change management and strategic messages.

CONTEXT

What's changing in the world creating the situation and the reason for change.

VISION

Your direction and concept of long-term success.

GOALS

The specific initiatives relevant to your vision.

WHAT'S IN IT FOR YOU

The benefits to the stakeholders. What accomplishing these goals will mean for them.

WHAT'S REQUIRED FROM YOU

The specific action requested of the stakeholders. What is necessary for them to do.

NEXT STEPS

The immediate plan of action and responsibility.

WHAT SUCCESS LOOKS LIKE

Illustrate the future state and benefits of achieving them.

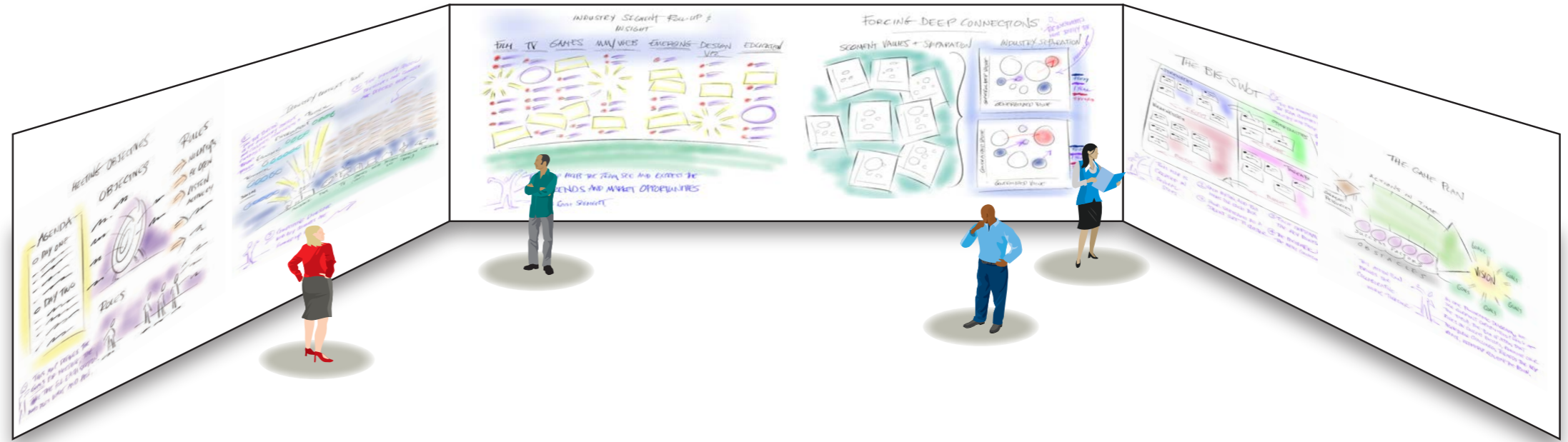
CLARITY TOOLS

Clarity is a collaboration system designed to help leadership teams get clear about what's important in their businesses.

Using visual thinking, rapid prototyping and collaborative techniques, ClarityTools equips leaders with powerful approaches to drive change within their organizations.

Clarity is designed to make strategy visible, persistent and panoramic. Its fundamental principle is to convert the mental and business models held in the minds of teams and render them as visual models - diagrams that can be worked, interrogated, developed and reworked. The result: the full team creates a shared understanding of where the business is, when it can go, and what to do to get it there.

Unlike other collaboration approaches, Clarity takes full advantage of a team's experiences and talents to imagine, design and create better products, services and solutions - and more profitable businesses.



FOCUS ON ANSWERING BETTER QUESTIONS

Business strategy is best served as a contact sport. And clarity encourages teams to begin with fundamental questions essential to drive business at all levels of execution. The better the questions, the better the results.

MENTAL MODELS INTO VISUAL MODELS

According to inventor Alan Kay, visualization is worth 80 IQ points. The act of creating diagrams that accurately display the dynamics of business helps teams get to the essence of their issues and opportunities.

CLARITY THROUGH COCREATION

Teams cut through clutter, complexity and confusion when they build together. By creating visual prototypes of business using the essential diagrams, teams end up the right conversations.

PANORAMIC STRATEGY

This mini-workbook provides a sample of a few key frameworks for visualizing business.

Individually, each can help a team reach clarity into the factors influencing and shaping the organization, its customers and value creation.

Together, the combination of diagrams create a holistic framework that maps broad domains of your business, from general macrotrends to consumer needs, capabilities and tastes, and from competitive environments to specific plans of action.

It's the co-creation of these diagrams that enable individuals to feel what they said was heard. Panoramic information tableaus allow teams to create a comprehensive visual logic connecting all parts of the diagram together and all parts of the business and strategy together.

Making strategy large, persistent, malleable and consequential makes all the difference.



MAKE STRATEGY VISIBLE

The act of visualizing elements of strategy enables teams to see all the details - and equips them with information to abstract the relevant messages from the big picture .

MAKE THE PROCESS COLLABORATIVE

Seeing a complete diagram makes teams think the work is all done; there is nothing to contribute. Filling in, improving, shaping the full diagram engages teams into full participation.

BUILD PROTOTYPES TO SHOW WHAT YOU MEAN

Business strategy is best served as a contact sport. Make strategy visible, tangible, panoramic and persistent to get the very best of teams thinking. teams to begin with fundamental questions essential to drive business at all levels of execution. The better the questions, the better the results.