

Getting to the heart of the
matter

*Critical Preparation for Complex
Organization-Wide Projects*



Who am I talking to?

- Experience with:
 - Employee engagement/satisfaction surveys?
 - Audience analysis for instructional design?
 - Process discovery sessions?
 - Focus groups to determine training needs?
- How do you find out what's going on in your company (your client's company)?
- How do you capture what people actually DO?

Standard information gathering

- Techniques
 - Surveys
 - Questionnaires
 - Interviews
 - Literature research
 - Hypotheses and experiments
 - Brainstorm meetings
 - Time-motion studies

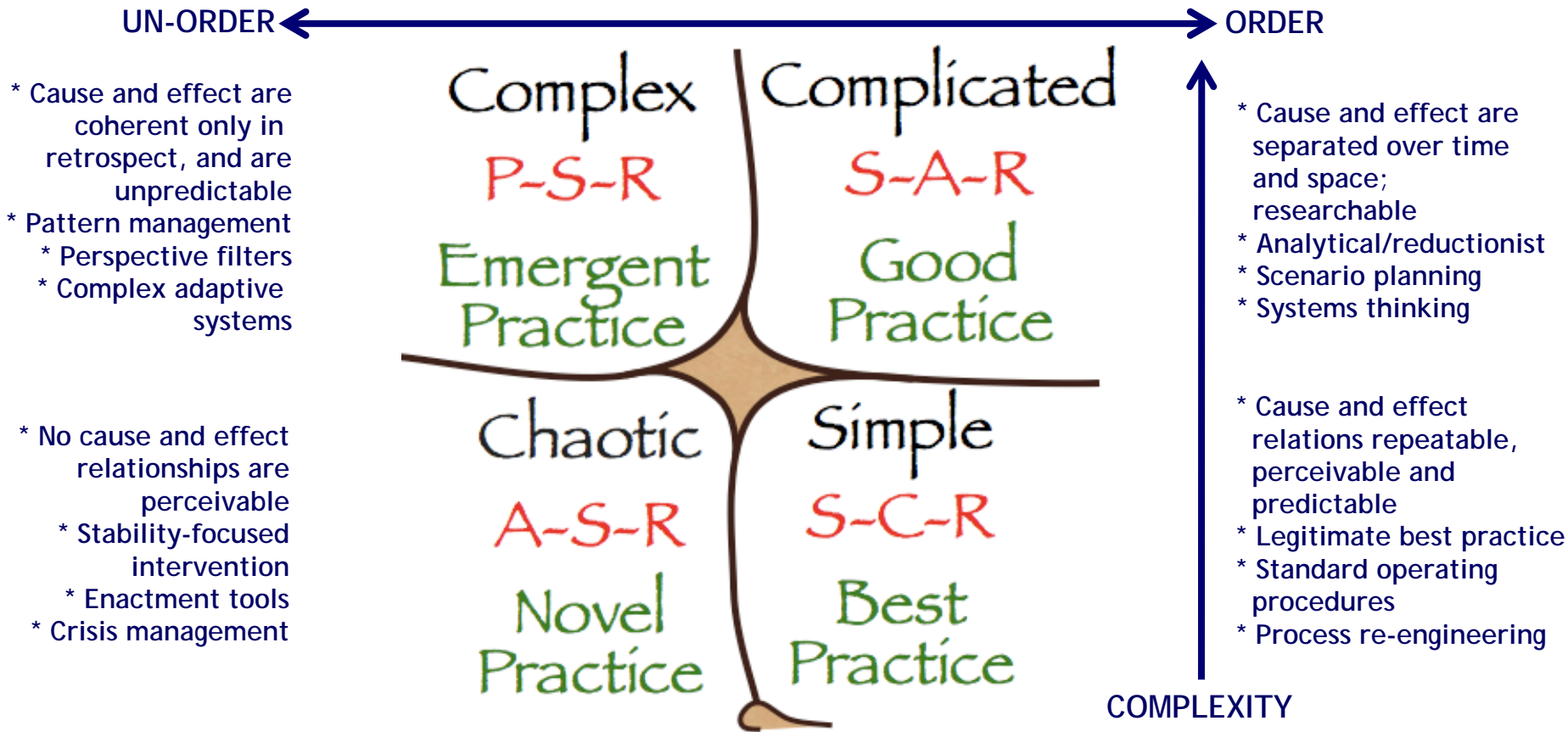
Conventional models

- Assume homogeneity of answers
 - Likert scales, Yes/No, Ranking or sequencing
- Don't handle "that depends" or "yes, under condition x, but no under y" scenarios
- They can be "gamed" → results can be manipulated

Shortcomings

- Ranking constraints
- Time-consuming
- Answers only to questions asked
- "Safe" answers
- Skewed answers
- Observer bias

The Cynefin framework



Cynefin framework from Kurtz, C.F. and Snowden, D.J. "The new dynamics of strategy", IBM Systems Journal, September 2003.

Given human behavior ...

- We always
 - know more than we tell
 - tell more than we write
- We only know what we know, when we need to know it, in context
- Humans make decisions based on patterns
- Human systems are complex-adaptive

Cognitive Edge model

- Tell me about a time when ...
- Tell me: what does your story mean?
Tell me how to make sense of your experience?
- Analyze the metadata: look for anomalies

Exercise 1 - Anecdote Circle

- See instruction sheet

Anecdotes allow for ...

- Processing open-ended answers
- Getting information faster and at less cost
- Getting more realistic information
- Capturing “disaster” and “near-miss” stories, as well as successes
- Getting equal participation
- Eliminating observer bias

Contextual narratives

- Are memorable, *because* they are emotional → oral histories
- Follow ingrained patterns
- Have well-established models
 - Ditting (“one-upping”)
 - Indirect storytelling
 - Fairy tales and Folklore
 - Metaphor

Anonymity and tagging

- No direct link to individuals
- Look at big picture
- Ignore the norm
- Focus on the “bumpy bits”
- That’s where trends emerge

Naturalistic sense-making

- How do we make sense of the world, so we can act in it?
- Aspects of naturalizing sense-making:
 - Do we see the data?
 - Are we paying attention to the data?
 - Do we, or can we get others to, act on the data?

Exercise 2 - Tag the stories

The role of metadata

- Tags: This story is about ... (check as many as apply)
 - Employee resourcefulness
 - Management quality
 - Process bottlenecks
- Filter: In this story, the role of "x" is ...

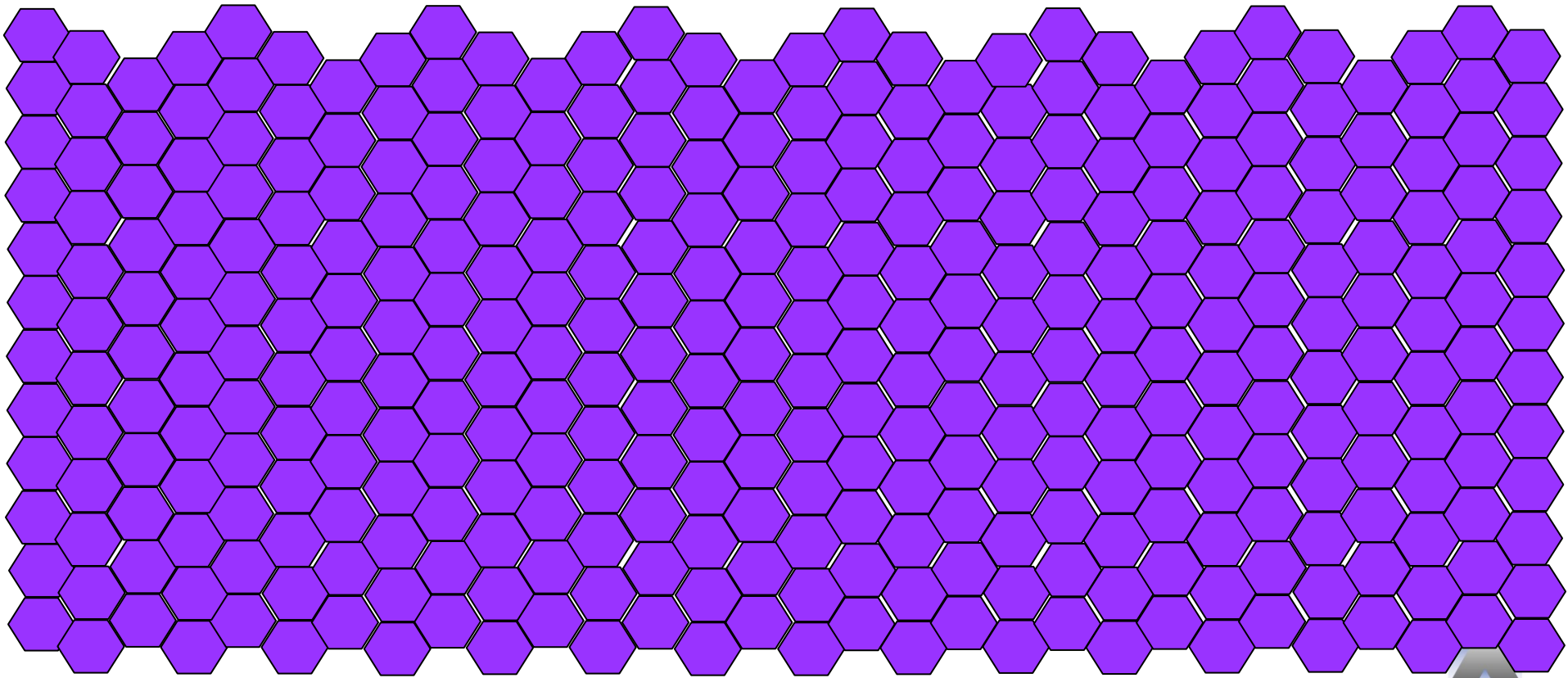
So strong, that it stifles all initiative and makes staff want to avoid them at any cost



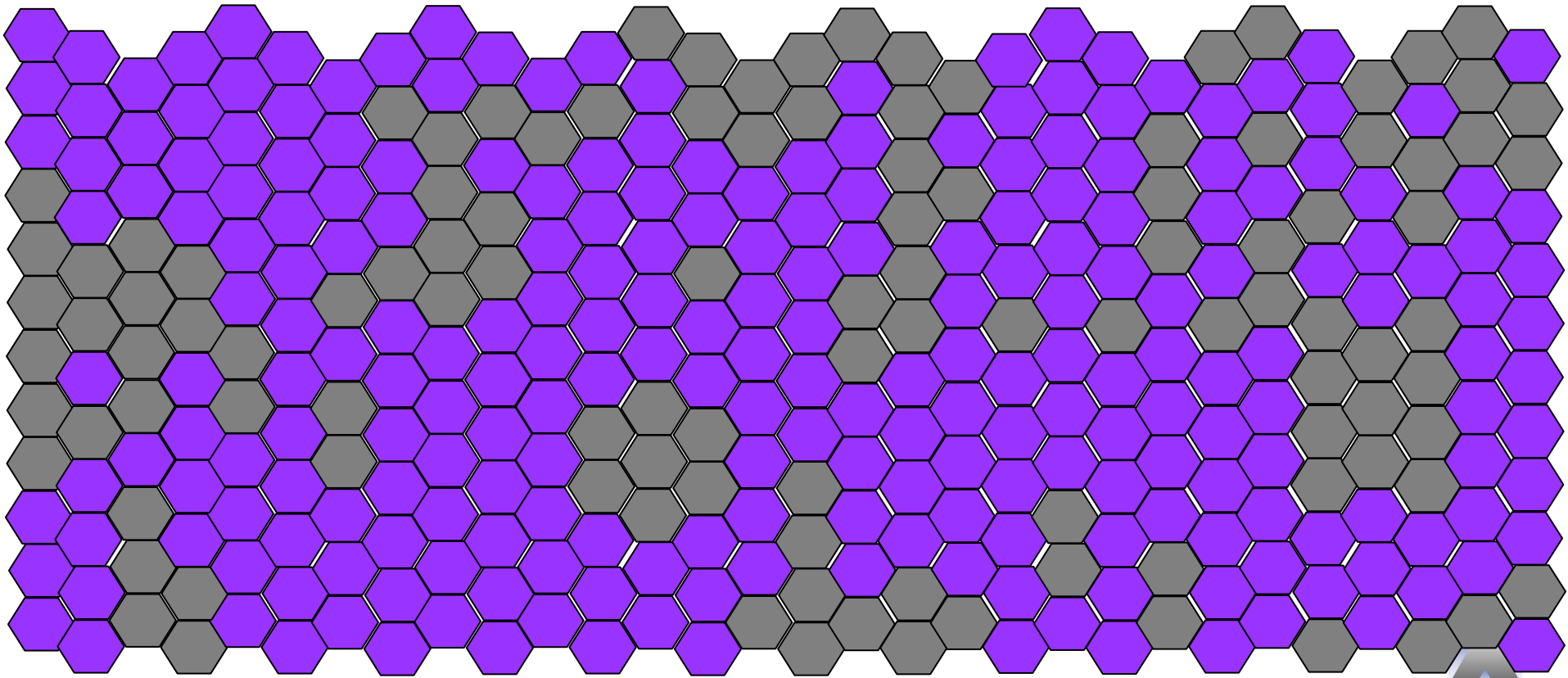
Not strong at all, there are no procedures, no controls or checks and it's every man for himself

Opposing negatives

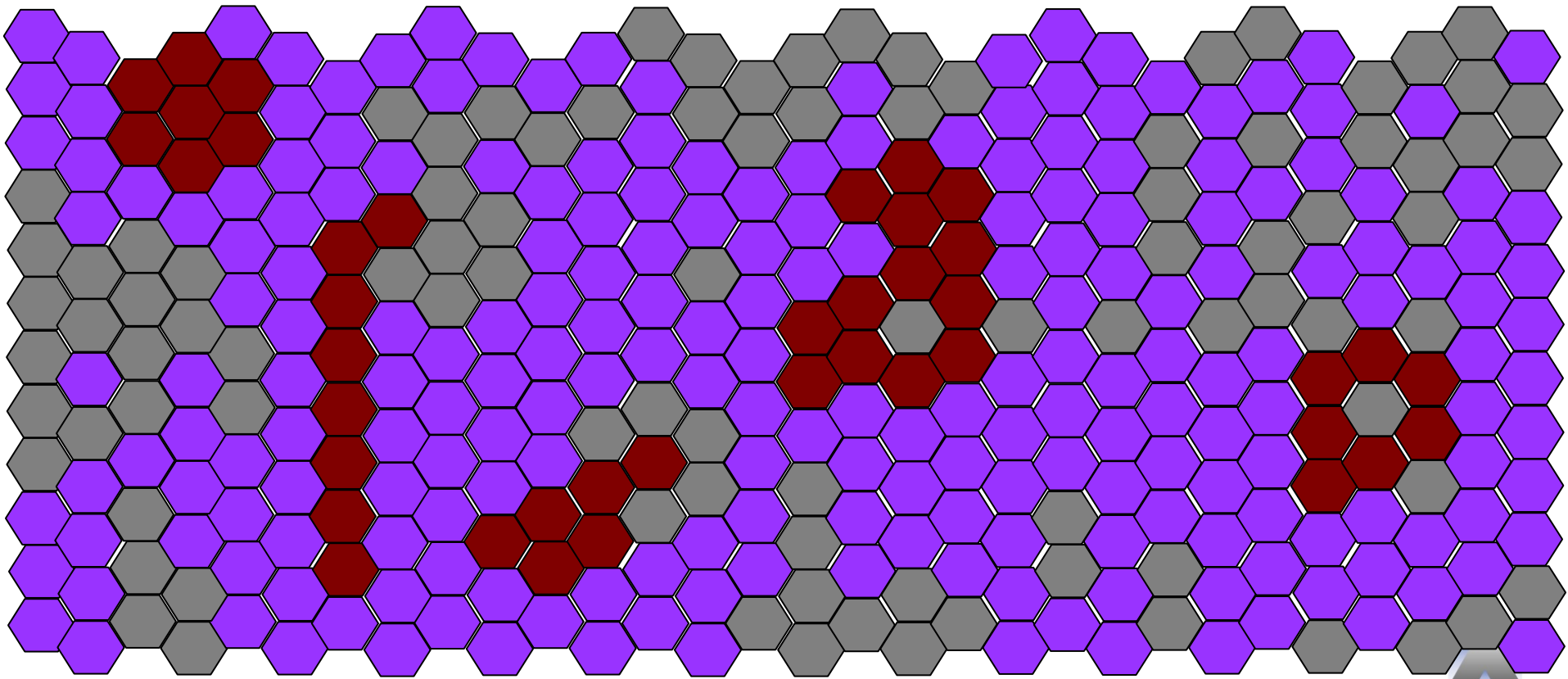
Emerging patterns



Emerging patterns



Emerging patterns



Applications

- Discovering hidden problems around
 - Change management
 - Requirements gathering
 - Process review and redesign
- Decision-making around complex issues
 - The unknown 'unknowns' that impact business performance

Outcomes and take-aways

- Rich scenarios, both good and bad
- Valuable personas, scenarios
- Deeper understanding of user needs
- Identification of gaps and flaws in process
- Connections between intent and impact

Contact

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www.cognitive-edge.com