next

VISIONING IP

Fact Find Analysis
Overview

Global Futures
& Foresight

Contents

Purpose

The purpose of this document is to outline the philosophy and methodology that supports the Next Visioning analysis (data gathering) approach used by Global Futures and Foresight Ltd. to obtain insight into an organisation's capability to engage with change.

Why undertake analysis?

The analysis and exploration of the organisation's activities allow it to identify and understand its current propensity and ability for engaging with the drivers of change and achieving effective change. That is, the drivers of change that it is accommodating and managing as well as those that are only just emerging and are likely to be of increasing strength and influence over time.

The findings provide the organisation with insight into how able and responsive it is to react to change, that is, how adaptive and agile it is in mitigating risk and taking advantage of opportunities. Using this information, the organisation is then able to develop appropriate strategies which will make it possible to mitigate the risks of detrimental change and take advantage of opportunities which can propel it forward.

The analysis is undertaken with the senior members of the organisation and therefore provides insight into the business at the highest level.

What is the Next Matrix?

The Next Matrix is a tool that allows an organisation to take both a high level and a detailed analysis which enables the organisation's leaders to see how the characteristics and capabilities of the organisation interact with one another to determine how it engages with change.

It is made up of nine "**Drawers**" each of which contains a topic. The drawers can contain and explain the relationship between specific activities and projects already in use, adopted or underway within an organisation. These can be projects, processes, management models and strategic tools for the delivery of projects related to the drawer in which they fit. So, for instance Belbin and Myers Briggs psychometric tools that sit within the "behaviour" drawer, whilst Porter's Five Forces, which analyses the market cycles, sits within the "cycles" drawer.

The Next Matrix sits above them to provide a meta-view, a heli-view of the organisation and is not meant to replace what is already in place and being used by the organisation.

Next Matrix Topics

The topics in each **Drawer** cover: 1. Resources, 2. Foresight, 3. Vision, 4. Cycles, 5. Behaviour, 6. Culture, 7. Capability, 8. Communication and 9.Values.

The diagram below is an illustration of the nine drawer Next Matrix.

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

The Next Matrix helps an organisation's leaders to also determine where it is focussing its energies as they relate to activities for Today, Tomorrow and the Future. Additionally, it also allows the leaders to understand the organisation's capacity to define its purpose, develop

appropriate strategies that support its purpose and eventually implement these strategies so that the purpose is realised.

Next Matrix – an analytical tool

The Next Matrix is an analytical tool which provides the organisation with insight into how it is operating at a variety of levels in relation to its ability to embrace change. The results of the fact find / research are presented as scores representing a variety of perspectives. These are:

- A score for each drawer
- Horizontal scores
- Vertical scores
- Scores for four quadrants of four drawers each
- Total score

There will be a total of 20 scores overall.

Score breakdown

The breakdown of the scores in each of the ways is as follows:

- **Individual results** - a score for each of the nine drawers = 9 scores
- **Horizontal results** - scores relating to Purpose, Strategy and Implementation = 3 scores
- **Vertical results** - scores relating to Today, Tomorrow and Future = 3 scores
- **Quadrant results** - scores relating to the Vision quadrant, Resources quadrant, Capability quadrant and Values quadrant = 4 scores
- There will also be an overall score for the entire matrix = 1 grand score

The diagrams below depict examples of how the scores are assigned

Nine drawers

Resources	Foresight	Vision
Cycles	Behaviour	Culture
Capability	Communication	Values

Vertical

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Horizontal

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Quadrants

Resources	Foresight	Vision
Cycles	Behaviour	Culture
Capability	Communication	Values
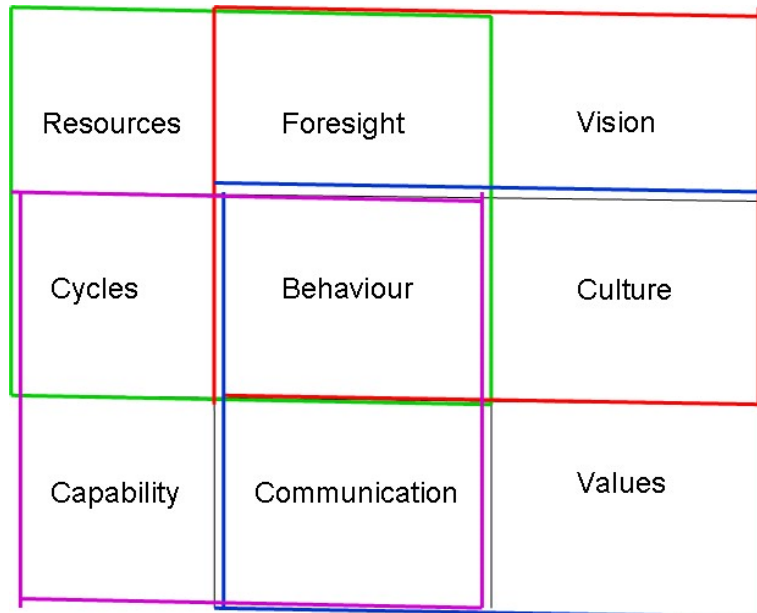
Analysis participants

As indicated previously, the findings from the analysis illustrate the senior management's ability to engage with change. It is recommended that the organisation extends the analysis to mission critical partners and suppliers.

Methodology for undertaking the analysis

There are two approaches for undertaking the analysis. The first encompasses a high level (meta-view) approach which provides a fast view of the organisation. It requires the senior management to score their organisation by selecting the appropriate option, based on their perception, across five layers in each of the nine drawers within the Next Matrix. It can be completed by senior leaders with no intervention by GFF.

The second takes a much more detailed approach to gathering information. This approach is usually facilitated by GFF undertaking individual interviews with the appropriate senior level individuals. In addition, the organisation can elect to include the next layer of management.

Methodology

Meta-view

For the meta-view (heli-view), senior managers in the organisation are asked to score from their perspective against the five layers in each of the nine drawers. In each layer there are four options from which to choose. These options indicate the level to which the organisation is engaged in the specific activity. Note there are no questions in relation to this data gathering effort. It relies on individual responses based on perceptions of what is occurring using the definitions provided for each layer.

The five layers are:

Purpose – here the organisation identifies why it makes the choices it does and provides the context (the vision) for whatever is being done. Equally important is to acknowledge whether this purpose has been documented and disseminated.

Strategy – the strategy provides focus and direction for the actions which lead to alignment with the purpose. It also needs to be documented rather than simply have been talked about.

Implementation – at this layer the focus is on whether the strategy has been applied, that is, whether it has been communicated, adopted and acted on within the organisation.

Leverage – looks at the organisation's engagement with its entire stakeholder community and its markets and the impact of its choices on them in relation to increasing performance.

Next – consider 'What's Next?' for the organisation. The core activity is to review and inform systematically and routinely what the organisation should be pursuing next in each of the nine drawers.

At each layer, the four options to which the scores are to be applied are: never, sometimes, often and systematically. The driver behind these options is to determine whether the organisation systematically engages in what is being reviewed. High scores will be obtained where activities are systematically undertaken and low scores where they are never undertaken.

Completing the meta-view analysis

The overall purpose of the meta-view analysis is to review and inform the organisation.

What is being sought is to determine the perceptions of the senior managers in relation to how the organisation engages with each of the nine drawers in the Next Matrix across the five layers – Purpose through to Next.

The analysis would unfold in the following way:

The individual determines the frequency in which the organisation engages with steps relating to each drawer as they pertain to engaging with change. That is, whether the organisation never, sometimes, often or systematically ensures that the topic is informed by its **purpose**. For example, is engagement in generating foresight never, sometimes, often or systematically informed by the organisation's purpose? The same approach would then be applied to each of the subsequent layers in the matrix. As stated before, this analysis can be undertaken directly by the individual or facilitated by GFF.

Mega-view (detail)

The detailed analysis essentially uses the same overarching approach and outline as the meta-view template, however, it has been extended to include quantitative and qualitative questions. It is the responses to the quantitative questions which will be scored and the responses to the qualitative will provide additional depth and insight into the perceptions of the organisation.

The philosophy behind the questions is to explore and identify the actual steps and activities the organisation is undertaking in relation to engaging with its future. The first level of responders in this analytical process are the senior managers and then in order to test the understanding and application of what they have identified, it is recommended that the analysis is then extended to the middle and lower levels of the organisation.

The following section provides an overview of the key aspects which are explored to determine how the organisation engages with the process of change as it relates to each drawer. The focus is not only on what takes place within the drawer but also on how it is directly affected by adjacent drawers.

Foresight	**Vision**
Behaviour	Culture

Vision: to identify the correlation between the organisation's vision and the foresight that it generates. The vision should inform what is looked for in the future and the foresight generated should inform the vision and appropriate adjustments should be made as necessary. It should also be the guiding principle in everything for the organisation. In particular the vision informs the development of culture of and the behaviours within the organisation.

Resources	**Foresight**	Vision
Cycles	Behaviour	Culture

Foresight: is about the organisation's take on the future. It is essentially their view of the future informed by trends and insights. In this drawer the intention is to determine whether the organisation can identify the quantity, quality, appropriateness, frequency and methods used to gather insights and generate foresight for it to consume. The cycles inform the resources applied to generating foresight and the foresight generated allows the organisation to update their vision as necessary. Not to be overlooked are how the culture and behaviours exhibited illustrate the organisation's response to foresight generation.

Resources	Foresight
Cycles	Behaviour

Resources: here the organisation identifies what resources are applied to looking for and / or responding to foresight to help it de-risk itself and set it up to exploit opportunities presented by the drivers of change. The degree of resources the organisation would apply would depend on the status of the economic, market and product / service cycles. The behaviour that is supported within the organisation confirms why and what resources are applied as it seeks to engage with the change that is affecting its future.

Resources	Foresight
Cycles	Behaviour
Capability	Communication

Cycles: allow the organisation to recognise where it is in its economic, market and product / service cycles and to understand their propensity to want to engage with the drivers of change that will help them innovate. Cycles also impact the organisation's desire to fund futures thinking which should always be 'tested' against their need to look ahead. Resources impact cycles in that the level of resources applied are dependent upon the where the organisation is in each of its cycles. Similarly the ability to harness and take advantage of the different cycles statuses is dependent upon the existing level of capabilities within the organisation. As always, the behaviours that the organisation supports directly impact the organisation's success in delivering in relation to its location on the different cycles.

Resources	Foresight	Vision
Cycles	**Behaviour**	Culture
Capability	Communication	Values

Behaviour: to determine to what degree the organisation understands the different behaviours and how they react to change and whether they are aware of what behavioural types need to be included in and lead different types of change initiatives. Our individual and collective behaviours impact all parts of the organisation which is why it sits at the centre of the Next Matrix.

Foresight	Vision
Behaviour	**Culture**
Communication	Values

Culture: this is about looking at and examining the reality of the organisation's culture to enhance its ability to recognise and respond to change. In particular it is informed by the vision, values and behaviour of the organisation. The culture of the organisation also demonstrates its desire to engage in gathering insights and generating foresight to support its vision. Additionally, the way communication is managed within the organisation is a direct reflection of its culture.

Cycles	Behaviour
Capability	Communication

Capability: to identify the key capabilities the organisation needs to have in proportion to their need to change and respond to change. That is, what skills, at what level of competence are deployed where in the organisation. In addition, the organisation needs to be able to identify the types of external resources from which they could be looking to get help. Capability requirements are also informed by the economic, market and product / service cycles in which the organisation is operating. The behaviours which the organisation chooses to promote play and its communication style play an important role on the identification of the capabilities required to support the organisation's purpose and vision.

Cycles	Behaviour	Culture
Capability	Communication	Values

Communication: this drawer looks at what is communicated, how it is communicated and whether the communications are aligned with the organisation's purpose. It will also look at how much of their internal and external communications are about their engagement with their future. It takes into consideration whether what is being communicated is consistent with the organisation's culture and values. In relation to capabilities, the key is to determine who is responsible for internal and external communications. At a secondary level, the location in the different cycles (economic, market, product / service) all affect the overall communication strategies and plans.

Behaviour	Culture
Communication	Values

Values: analysis undertaken will capture the organisation's core values. It will identify the likelihood of the organisation's ability to create a culture that encourages forward, agile thinking or if they are more aligned with stability and continuity and pull against innovation and change. Directly correlated to the values of the organisation is its culture as they both impact on each other. It will demonstrate whether the behaviours are aligned with the values and vice versa and what communication processes are used to disseminate the values to the organisation as a whole.

It is evident that all of the drawers inform each other; there is a symbiotic relationship between each of the drawers which means they cannot be looked at solely on an individual basis, that is, in a vacuum. The impact of the drawers on each other is to raise the questions: why do you do what you do, what do you do, how much of it do you do, when do you do it and how do you do it.

Next Matrix client engagement options

There are two options for engaging with the roll out of the Next Matrix analysis process. These are either for the organisation to it themselves and then provide GFF with the data which will then be analysed and the findings presented to the organisation. Or the analysis can be completed by GFF which will conduct face to face meetings to gather the information which will then be analysed and reported back to the organisation.

Note that one of the most important aspects of undertaking this analysis is to ensure that it is not completed as a group activity. It needs to be completed on an individual basis as this will provide rich data which depicts each person's perception of the steps being undertaken within the organisation for each drawer. These perceptions will then facilitate valuable discussions.

Interpreting the data

Meta-view

The data obtained from the meta-view approach provides insight into the frequency in which the organisation is perceived to engage in specific actions relating to each of the nine drawers in the Next Matrix. The higher the frequency, the higher the score and therefore the lower the frequency, the lower the score obtained.

A high score means that the organisation is competent and engaged. That is, it displays particular competence and abilities in each of the drawers. A low score depicts areas where focus and attention need to be paid by higher management in order to get fit for the future.

Mega-view

This approach includes detailed questions at each of the five layers across the nine drawers. The questions posed will be both quantitative and qualitative and the scores will be based on the responses to the quantitative questions whilst the qualitative questions provide a secondary source of significant anecdotal information.

As identified earlier, the data obtained via this approach will reflect four types of scores, plus an overall grand total score. The breakdown of the scores is as follows:

The breakdown of the scores in each of the three ways that they are calculated is as follows:

- **Individual** results will provide a score for each of the nine drawers = 9 scores
- **Horizontal** results will provide scores relating Purpose, Strategy and Implementation = 3 scores
- **Vertical** results will provide scores relating to Today, Tomorrow and Future = 3 scores
- **Quadrant** results will provide scores relating to the Vision quadrant, Resources quadrant, Capability quadrant and Values quadrant = 4 scores
- There will also be an overall score for the entire matrix = 1 **grand** score

As a result the data will provide 20 outcomes for the organisation.

The following diagrams provide illustrations of the scores in relation to the Next Matrix

Individual score for each drawer

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Acores for each vertical column and horizontal row.

	Today	Tomorrow	Future	
Purpose (Why)	Resources	Foresight	Vision	Horizontal score
Strategy (What)	Cycles	Behaviour	Culture	
Implementation (How)	Capability	Communication	Values	

Vertical score

Four by four quadrants

Quadrant 1 – **Vision Quadrant**

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Quadrant 2 – **Resources Quadrant**

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Quadrant 3 – **Capability Quadrant**

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values

Quadrant 4 – **Values Quadrant**

	Today	Tomorrow	Future
Purpose (Why)	Resources	Foresight	Vision
Strategy (What)	Cycles	Behaviour	Culture
Implementation (How)	Capability	Communication	Values