

# Systems Thinking Template Worksheet

Universal and Quick Systems Thinking Solutions for Chronic Issues

By Stephen Haines, Founder and CEO of the Haines Centre for Strategic Management®

The belief that the world is flat was once the prevailing thought, and anyone who disagreed was considered insane. Centuries later, this “normal” has changed. Similarly, the “new normal” in the world and in business is not the old normal. The world is rebalancing and rebuilding itself now—country by country.

It's just like Jack Welch famously said: “If you are doing business now the same way you did it five years ago, it's probably obsolete.”

You've heard all this, right? So what is there to do about it?

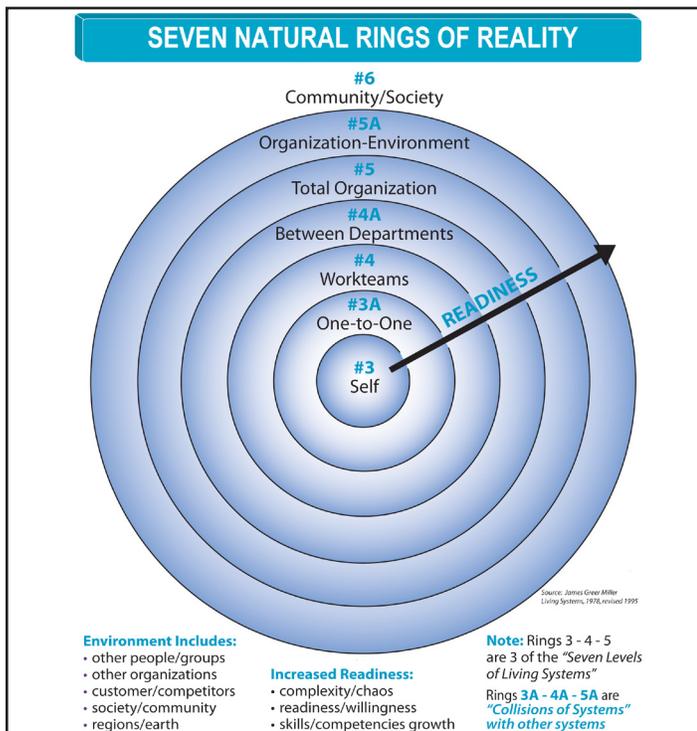
Well, you can decide if your organization—whether it's in the public, private, government or nonprofit sectors—wants to remain bureaucratic or become effective? Will you be among the “defenders of decline,” or will you be “architects of your own future”? This decision has short- and long-term implications.

## Long-term Implications

To abolish bureaucracy and be highly successful, you need to change your culture and focus. The following table indicates what the order of your focus needs to be if you want to be successful.

BUREAUCRATIC ORGANIZATIONS	SUCCESSFUL ORGANIZATIONS
#1. Senior Management	#1. Customers
#2. Owner	#2. Workers
#3. Workers	#3. Owners
#4. Customers	#4. Senior Management

Instead of just catering to senior management and owners, the focus should be on customers and workers. Following this order eliminates unnecessary bureaucracy and increases customer value—making your organization a high-performance one that will in turn please the owners and senior management.



We don't deal with problems.  
We deal with “messes” of interrelated problems.

— Russ Ackoff

## Short-term Implications

Your organization probably has issues that have plagued it for a long time—and that critically need problem-solving *today*. Or you may have one specific topic or strategy that needs a fundamental change of direction today. Or perhaps you just need a quick, tailored Strategic Plan for your organization, divisions, business units (SBU), Major Functional Areas (MFA), Programs (MPA) or Projects. If so, this article is for you. The templates that follow are **universal in nature** and have been used successfully on every continent for over 20 years.

For instance, you can be a strategic thinker and chronic problem-solver at any of four levels of your organization:

1. Corporate strategy (Enterprise-wide positioning)
2. Business Unit strategy (competitive strategy)
3. Functional/ Project strategy (MFA, MPA, etc.)
4. Implementation/ Project strategy

There are critical differences between strategies and tactics, as the following table indicates.

STRATEGIES	vs.	TACTICS
Central organizing statements	vs.	Day-to-day actions
Major approaches	vs.	Flexible/adaptive day-to-day
Road map for marketing plan	vs.	Vehicles for the trip
Doing the right thing	vs.	Doing things right
Concepts	vs.	Tools of execution
Organizing glue	vs.	What gets glued
Focused	vs.	Typically many things
Groups of initiatives	vs.	Initiatives
“Action” statements/ priorities	vs.	Things/tasks

While there are critical differences, both strategy and tactics can benefit from this quick and universal framework designed to address your organization's chronic issues.

## QUESTIONS

### First Question to Ask to Become Successful:

The first question is always, “What is the main system are you trying to change?” (See the rings visual).

The three key levels of living systems that affect organizations are individuals, teams and organizations. Their three levels of collisions/collaboration are one-to-one, team-to-team and organization-to-environment. **The Seven Natural Rings of Reality** can be envisioned as concentric circles or rings rippling out from the individual to society. There are purposes for focusing on and developing each ring in order to be successful. (See next page for detailed descriptions of each ring.)

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**Ring #3—Individuals (“Self Mastery”)**

- To improve personal competency and effectiveness
- To work on trustworthiness issues within oneself

**Ring #3A—One-to-One Relationships (“Interpersonal Skills”)**

- To improve the interpersonal and working relationships and effectiveness of each individual
- To work on trust issues between individuals

**Ring #4—Work Teams or Groups (“Team Effectiveness”)**

- To improve the effectiveness of the work team and its members
- To create empowerment and work on role or relationship issues

**Ring #4A—Inter-Group (“Conflict Cooperation”)**

- To improve the working relationships and business processes between departments in order to serve the customer better
- To work on horizontal collaboration and integration issues

**Systems Level/Ring #5—Total Organization (“Fit”)**

- To improve the organization’s structures and processes to better achieve business results and develop its adaptive response system capacity in a changing environment.
- To work on alignment and attunement issues.

**Ring #5A—Organization-Environment (“Strategic Plans”)**

- To improve the organization’s sense of direction, response to its customers and proactive management of its environment.

So which main system (largest of the seven rings you choose) do you need to change? Choose from the seven rings and write it here for clarity of your system:

Level #: \_\_\_\_\_ | Level Name: \_\_\_\_\_

**Second Question To Ask**

In his bestselling book *The 7 Habits of Highly Effective People*, Stephen Covey said the key is to “begin with the end in mind.”

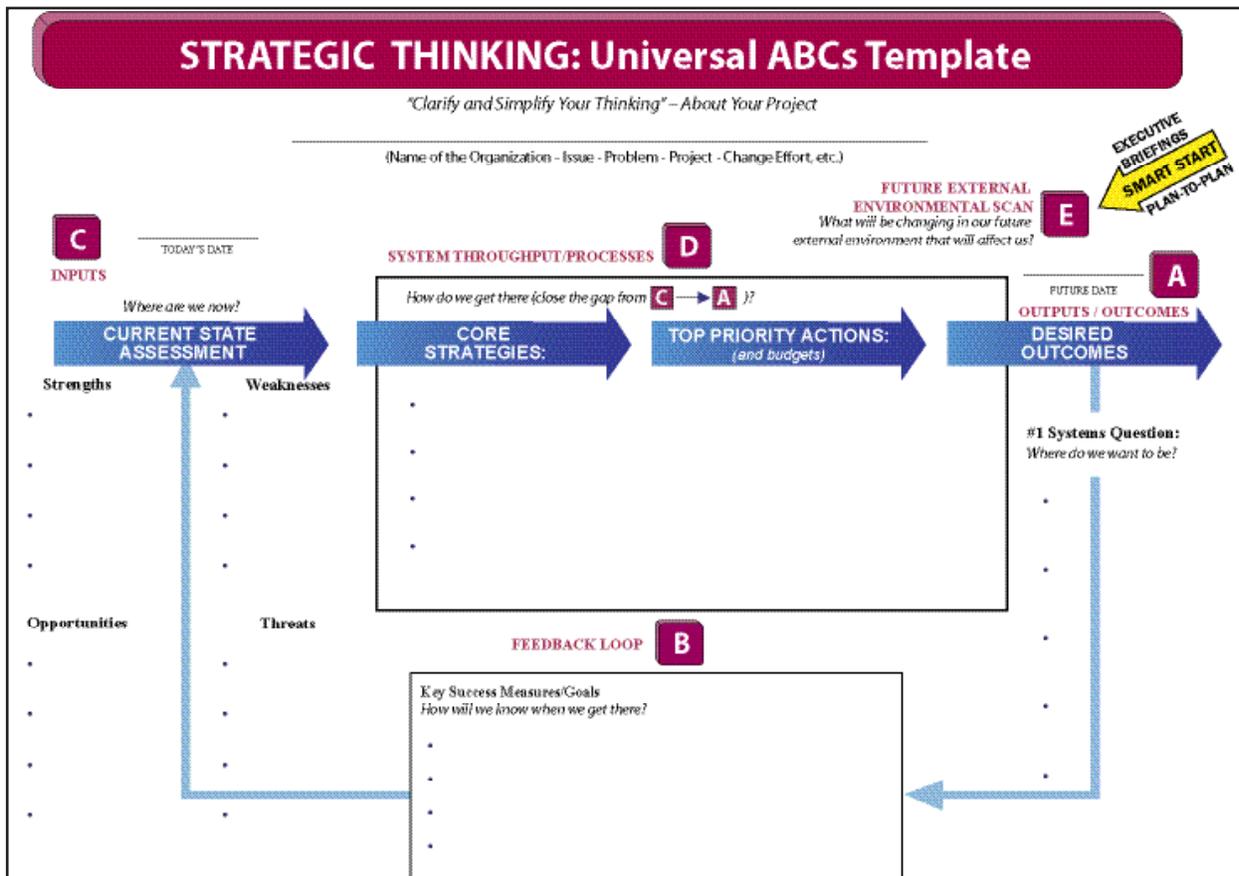
So, what are your top 1 – 3 (maximum) purposes for planning, problem solving or changing your system? What are your desired outcomes? List them here and keep it simple and focused.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Third Question to Ask**

Besides yourself, who are the other 4 – 6 (maximum) key people (stakeholders) to involve in the planning, problem-solving or desired changes? List them here.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_



## ABCs TEMPLATE WORKSHEET

NOTE: To fully understand the ABCs template and the Future Environmental Scan standard of SKEPTIC, we highly recommend two articles available on [www.SystemsThinkingPress.com](http://www.SystemsThinkingPress.com):

- *Becoming a Strategic Thinker on a Daily Basis* (code: ABST)
- *Environmental Scanning* (code: AES)

Now that you have identified your focus, it's time for you to spend a half or full day on this systems issue using the ABCs template worksheets included in this article. Here are a few tips for this "One Topic, One Agenda" meeting - solving chronic issues.

### Smart Start: One Topic-One Agenda Meeting

Use a "Smart Start" approach to the meeting by clarifying and gaining agreement on some key points in order to "engineer success up front." In this stage, it's important to answer three questions:

1. What will be changing in our future external environment that will affect us? (Phase E)
2. Where do we want to be? (Phase A)
3. How will we know when we get there? (Phase B)

After establishing the meeting purposes and agenda, create a To-Do List and make sure to follow up on each task. It is important to clarify how you will complete the ABCs worksheet on page 4. The template is based on Three Guiding Premises:

- Premise #1:* Planning and change are the primary jobs of leaders.
- Premise #2:* People support what they help create.
- Premise #3:* Using systems thinking focuses on outcomes that increase customer value.

### Hints for a One Agenda Meeting

For a successful "One Day, One Agenda" meeting on any Strategic Business Unit, Major Functional Area, Major Program Area, project or chronic issue, follow this additional helpful advice.

1. Keep Asking Questions:
  - What is the wildest idea you can think of in this area?
  - What would it take to do it? What would happen if we did it?
  - What is it that you can't do now, but if you could, would fundamentally change your business for the better?
  - Who are the competitors? What are they doing? What is the market data?
2. Take a holistic or higher level systems view and ask questions here (supplier → organization → customer).
3. Use this meeting for pre-planning discussions and brainstorming of a topic, for post-planning consensus and debriefing, and when stuck, to kick off a topic. Lastly use these during the year for follow up.
4. Focus on Key "Nuggets":
  - Hold meeting only a very small group of key players on the topic (6-8 maximum).
  - Analyze and discuss the topic in depth—from all angles, using good data.
  - Focus more on dialogue, discovery and learning, and less on planning and documentation.
5. Use the A-B-C-D-E model (template on page 4) as your discussion framework.

### Example: Solving Chronic Issues

The Haines Centre recently used the template worksheet on page 4 in Henderson, Nevada, a city with a population of 200,000. We conducted three "One Day, One Agenda" problem-solving meetings on 29 chronic issues identified by the city's middle management.

*Day 1:* The first day had 50 employees in attendance. They formed 10 teams of five key cross-functional people for each chronic issue of their choosing. By the end of the day, each of the ten teams presented their A-B-C-D-E solutions to the senior management of the city.

*Day 2:* Replicating day one, we saw 50 new employees (and 10 teams).

*Day 3:* We saw 45 more employees, and nine more teams presented nine more solutions to senior management.

At the end of three days, Henderson's senior management had 29 solutions to their 29 chronic issues and middle management to lead the solutions.

### SUMMARY

This ABCs Template is universal, and it works in every instance. It quickly solved 29 chronic issues for Henderson, and it can do the same for you. It simply takes continuous effort to reach your potential. This effort can bring about change in your personal or work life, or as a mini Strategic Plan for your area... or any issue or project.

*"Continuous effort—not strength or intelligence—is the key to unlocking our potential."*

—Winston Churchill

**SKEPTIC WORKSHEET**  
 Future Environmental Scanning/ Trends

**List the 5-10 Future External Environmental Trends - Projections facing you over the life of your plan:**  
*(Implications for your organization today - i.e., Opportunities and Threats come next: Backwards Thinking)*

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**S** Socio-Demographics (People/Society):

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**K** Competition/Substitutes:

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**E** Economics: **E** Ecology:

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**P** Political/Regulatory:

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**T** Technology:

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**I** Industry/Suppliers:

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**C** Customer/Citizens:

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# STRATEGIC THINKING: Universal ABCs Template

The problem is: \_\_\_\_\_  
 (Name of the Organization - Issue - Problem - Project - Change Effort, etc.)

**A IDEAL FUTURE VISION - YEAR: \_\_\_\_\_ DESIRED OUTCOMES (three max)**

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

**E FUTURE EXTERNAL ENVIRONMENTAL SCAN**

List your Key Stakeholders below - those with a "stake" in your success or failure

Use the SKEPTIC framework on Page 4 where relevant

KEY INTERNAL STAKEHOLDERS		KEY EXTERNAL STAKEHOLDERS	
1		1	
2		2	
3		3	
4		4	
5		5	

**B YEARLY GOALS: KEY SUCCESS MEASURES (three-five max)**

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_

**C CURRENT STATE ASSESSMENT - SWOT**

INTERNAL		EXTERNAL	
Strengths	Weaknesses	Opportunities	Threats
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	

**D SYSTEM THROUGHPUTS/PROCESSES: CORE STRATEGIES/TOP PRIORITY ACTIONS/BUDGET IMPLICATIONS**

what?	who?	when?	what?	who?	when?
1		5			
2		7			
3		8			
4		9			
5		10			

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