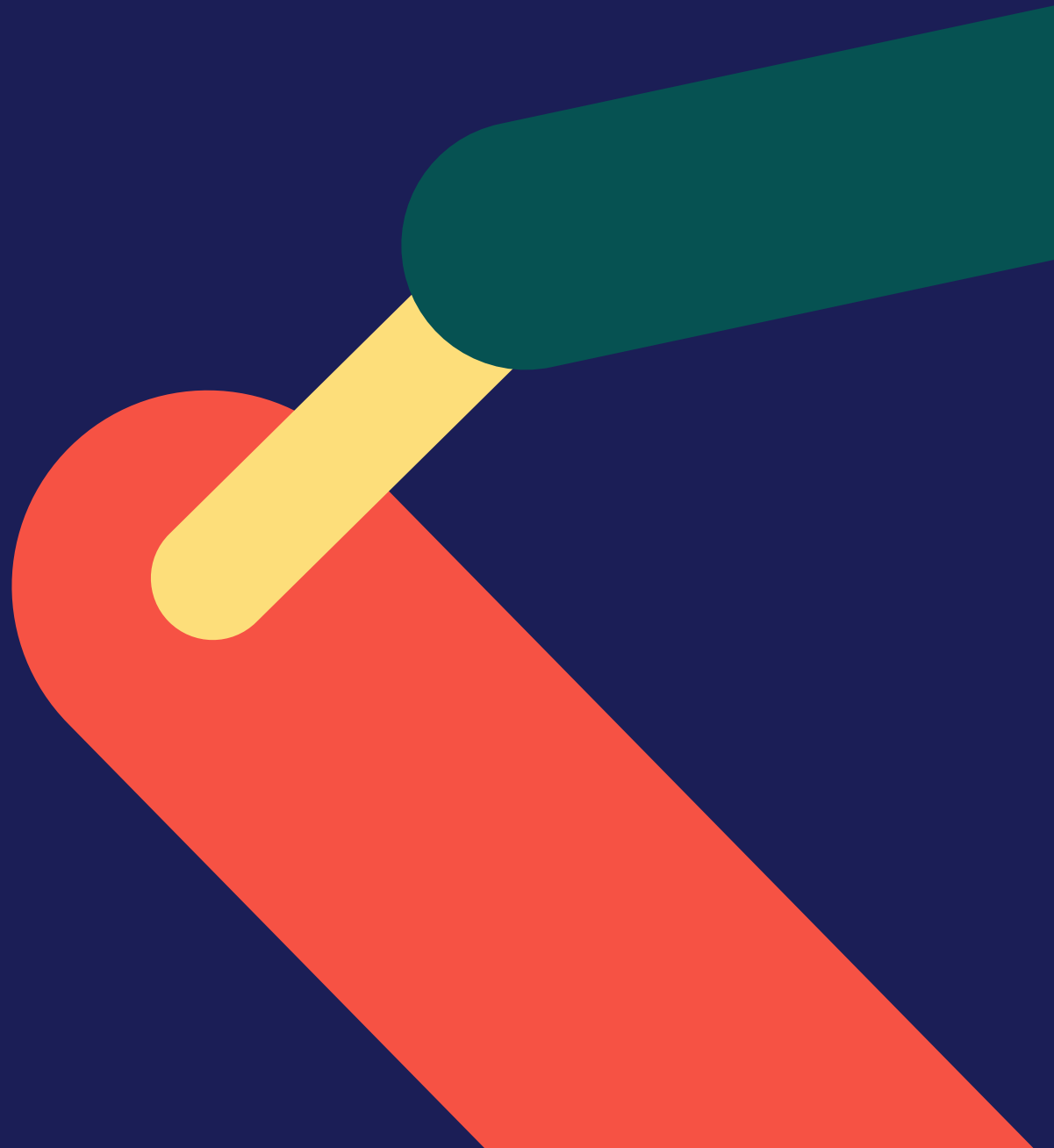
Commissioned by the KPMG consortium for:

Government CAMPUS

Designed & delivered by:

The PSC

An Introduction to Strategic Thinking



Welcome to

An Introduction to Strategic Thinking

Day 1	Challenging Environments	Understanding the Challenge
Day 2	Developing Insight	Stakeholder Engagement

Who are you? (30 seconds each)

- What's your name?
- What's your role?
- What are your objectives for this programme?
- What's your secret passion?

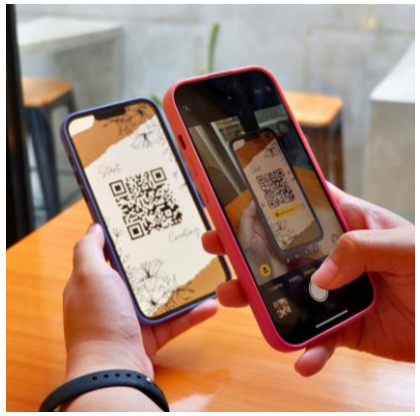
Welcome!

PRE-COURSE SURVEY

Before we get started, please complete the following form to rate your confidence with different elements of project work.

- **Link to pre-course survey: https://forms.office.com/e/9siz3NGKj4**
- **Name of this course:** An Introduction to Strategic Thinking
- **You can also follow the QR code** below to access the form:

You can scan the QR code with a **mobile device camera** to access the form



Strategic Thinking

PROGRAMME AIMS

- This programme is intended for staff from operational backgrounds who need to apply a **strategic mindset** to their role and business area
- We will introduce a **toolkit** for strategic thinking, problem solving, planning and change management, to help you:
  - Understand **complex/challenging environments** and adapt strategic thinking appropriately
  - Use conceptual frameworks to help **define strategic, operational, or policy problems** and options swiftly and in clear and simple terms
  - Use conceptual frameworks to **think in a structured way**, using appropriate tools to present arguments persuasively
  - Synthesise **clear and simple insight for senior decision makers** and stakeholders, and build confidence in **communicating, influencing and collaborating** with those audiences
- You will leave with an awareness of these tools and will have had some opportunity to practise their application
- Further practice is key to making them a part of your problem-solving armoury

You can download all course materials and tool templates at:
https://thepsc.co.uk/capability-building/course/an-introduction-to-strategic-thinking

The Strategic Thinking Programme

Pre-work	Challenging Environments	Understanding the Challenge	Developing Insight	Stakeholder Engagement
• Draft Problem Definition Sheet	• Introduction • Challenging environments • Our environment • Synthesising Insight (1)	• Defining the Problem (Problem Definition Sheet) • Structuring the Problem (Issue Trees) • Synthesising Insight (2)	• Developing insight (Hypothesis Trees) • Planning the work (boat chart workplans) • Options Appraisal • Synthesising Insight (3)	• Stakeholder Engagement • Influencing Styles • Synthesising Insight (4) – Communicating with stakeholders • Review & Reflect

Challenging Environments

COMPLEXITY

1. Recite the English alphabet in order, each person giving one letter at a time, going round the group in order

2. Tell a 26-word story together, one word at a time (again, going round the group in order), with each word beginning with the next letter of the alphabet. The theme of the story is ‘Our team day out’.

3. Tell a 3-minute story together, one word at a time (again, going round the group in order)

Debrief and reflection

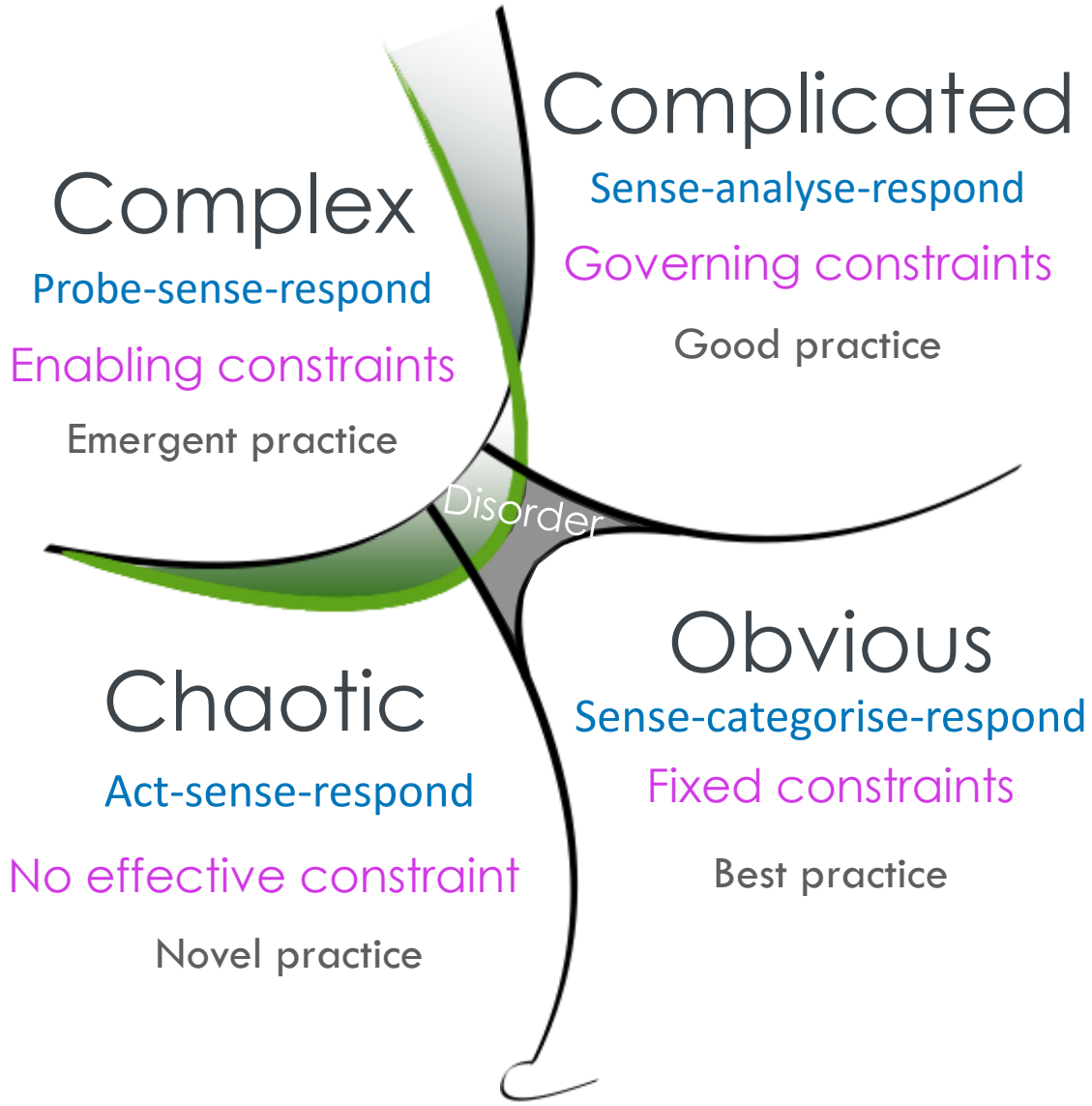
After each exercise, discuss:

- **How it felt**, as individuals and as a group

- **What you noticed** about the approach (such as the nature of the 'rules'/level of flexibility) and **what happened** (e.g. with planning, communication, outcome)

- **How this is relevant to your work**

Snowdon's Cynefin model identifies 5 decision-making domains to help make sense of the environment



Source: https://cognitive-edge.com/blog/liminal-cynefin-image-release/

Synthesising insight (1)

Synthesising strategic insight starts from understanding what needs to happen and how that might occur

SCQA TOOL

Situation	• How it used to be….
Complication	• What's changed is….
Question	• Question to be resolved
Outcome	• Desired outcome
Answer	• Your current working answer

SCQA has many uses:

- a daily check
- a conversation in a queue
- an email structure
- executive summary
- presentation introduction

To increase clarity on what needs to happen, consider adding an 'Outcome' element after the Question

To start familiarising yourself with the SCQA tool, take 10 minutes to write your favourite fairytale in SCQA format.

Situation	• How it used to be….
Complication	• What's changed is….
Question	• Question to be resolved
Outcome	• Desired outcome
Answer	• Your current working answer

Take 15 minutes individually for your project to write one sentence for each of the elements

We'll ask for a couple of volunteers to share with the group

Situation	• How it used to be….
Complication	• What's changed is….
Question	• Question to be resolved
Outcome	• Desired outcome
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The Strategic Thinking Programme

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Defining the problem: Problem definition sheets (PDS)

The Problem* Definition Sheet ('PDS')

- A Problem Definition Sheet sets out on a single page the question to be addressed and the important parameters of the project.
- They are helpful in ensuring everyone starts from the same understanding and agreement.

The problem statement needs to show the underlying question, and not a solution for it.

1. Basic question to be resolved	
2. Stakeholders, decision makers and project resourcing	3. Desired outputs and criteria for success
4. Scope of the work (in/out)	5. Outline timings and milestones
6. Context/ background	7. Constraints and risks/ dependencies/ interfaces

*Problem = question: something that requires a solution

The Problem Definition Sheet sets out your project on a page

PROBLEM DEFINITION SHEET (GUIDANCE)

PROJECT TITLE:

1. Basic question to be resolved Be as specific as possible and, within this, as succinct as possible. The question should be time bound and refer to a specific organisation, department, or process. Describe the underlying question that the project is aiming to answer, so you can use it to shape your analysis and test your hypotheses.

2. Stakeholders, decision makers and project resourcing

- Who are the project lead, sponsor and project mentors?
- What type of **project governance** is needed to monitor quality, decide on plans and provide external challenge, for example, a project board or steering group?
- Who are the **key stakeholders** with whom you must engage? Where do you expect the most support for this project to come from?
- Who are your **delivery partners** (e.g. information team)?

3. Desired outputs and criteria for success

- What are the **key performance indicators** (financial and non-financial) that will show the project has been successful? What targets are you aiming for on each one, for example, at least one option which meets criteria X / Y / Z, stakeholder support for our proposal to meet criteria X / Y / Z, a pilot demonstration of achieving Q / C / D)?
- What **specific end products** are required?
- Goals should be '**SMART**' (Specific, Measurable, Attainable, Realistic and Timely).

4. Scope of the work

- What's **included** within the project and what's not?
- If it is **out of scope**, is it being reviewed elsewhere?

5. Outline timings and milestones

- When are the project steering groups or **end of phase reviews**?
- When are the **key deliverables due**?

6. Context / background

Why is the work being done now?

7. Constraints and risks / dependencies / interfaces

- Outline the key likely **risks / constraints** to the project and any interaction with other projects or work.

Here's a first draft PDS for a cancer workforce question – what can you learn from it, what questions does it raise?

DRAFT EXAMPLE

PROJECT: CANCER WORKFORCE STRATEGY (TRUST)

1. Basic question to be resolved

How many cancer professionals will the local NHS Trust need in 15 years time, and how can we ensure we have them?

2. Stakeholders, decision makers and project resourcing

- NHS Trust leadership (names)
- Cancer leads and workforce leads at each hospital(names)
- Project team (name)
- Steering group (fortnightly)
- Monthly reporting to Cancer Alliance leadership

3. Desired outputs and criteria for success

Output:

- A clear baseline 'do nothing' scenario
- A set of scenarios covering external influences
- A set of options for the Trust to action against the scenarios
- Recommended strategy for the next 15 years

Success criteria:

- Agreement with leadership on 15-year strategic cancer workforce plan, with support from across the hospital teams
- Confidence across the stakeholders that the plan is realistic and achievable

4. Scope of the work

In scope:

- Impact of attrition, transition, retention, recruitment (incl international), retirement as well as requirement for flexible working
- Considering impact of new technology and treatments (e.g., genomics, diagnostics) on clinical and workforce model
- Demand for services (reflecting incidence, demographics, and public health interventions)
- Cancer professional roles including histopathology, clinical radiology, clinical and medical oncology, diagnostic and therapeutic radiography

Out of scope:

- Non-cancer workforce. Nursing not included in this phase, or other staff groups.

5. Outline timings and milestones

- Phase 1 by October – research and modelling towards interim report on BAU, scenarios and potential levers / options
- Phase 2 by January – options co-development
- Phase 3 by March – delivery and governance planning

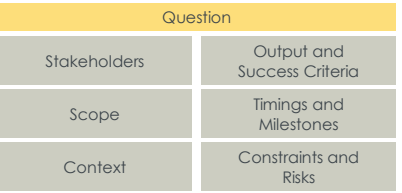
6. Context / background

In the light of ongoing workforce and budget challenges, and increasing demand for cancer diagnostic and treatment services, alongside potentially transformational evolution of care, the Trust would like to create a strategic workforce plan looking up to 15 years ahead.

7. Constraints and risks/dependencies / interfaces

- Staff availability for interviews will drive timeline
- Data availability may drive timeline
- Early stakeholder engagement needed to ensure effective scenarios and options are considered

Reference: How to use a Problem Definition Sheet (PDS) and the PPT template



What is this tool?
The Problem Definition Sheet ('PDS') is a one-page overview of the objectives for a challenging problem-solving project where the question and required output and success factors are clear (the 'solution space') but the answer is not. It shows the boundaries of what the project will involve. Its main purpose is to ensure that the project team and stakeholders start the project from the same base.

When to use this tool?
The PDS should be used throughout the project. It guides the problem-solving towards an answer to the question that meets the success criteria, and helps the team stay within the boundaries for timing, resourcing and scope.

Tips for problem definition

- The PDS is most useful when it's a **live document,** reviewed and refined regularly by the team with their sponsor. Use a first draft when scoping and test it widely with the team and stakeholders until you are sure everyone is on the same page. Don't be afraid to return to the PDS to reflect your increased understanding, or if stakeholders seek to widen the scope.
- Expect to spend **60% of the time agreeing the 'question'** – which your Issue Tree will structure into workstreams and your Hypothesis Tree will aim to answer – as it drives all your problem-solving. It should be as specific as possible and, within this, as succinct as possible. The question should be time-bound and refer to a specific organisation / department or process.
- Make sure you identify both the **outputs of your project**, for example,, a report of options or recommendations, or an implemented solution) and **the success criteria**, for instance, when you meet these you will stop).

Mentoring questions for using a PDS:

- **Start by identifying the basic / governing question**. Does this effectively state the problem that the project is aiming to tackle?
- **Identify key decision makers and stakeholders**. Do this quickly the first time through, it's easy to spend time here
- **Highlight the project outputs and success factors** (including Key Performance Indicators)
  - How will you measure / know the problem is sufficiently solved? Make sure this is quantifiable
  - What will you do / produce?
- **Identify the key contextual issues for the project.** Does the context box explain why this project matters, and how it's different from similar projects before?
- **Note what is in / out of scope**
- **Identify what constraints or interdependencies might exist**. Note important risks here too
- **Consider potential milestones for the project**. How soon can you test or 'PDSA' (Plan-Do-Study-Adjust)?

PowerPoint Instructions

- The template has three tables to make it easy to adjust the balance of the seven boxes, both within each column and between the two columns – the question is a single cell table, and each column is a separate table.
- The guiding question is coloured to highlight its role as the focus of the problem-solving.

Problem Definition Sheet template

- The question box is a separate shape.
- Each column is a separate table – adjust the balance by changing the column widths.

1. Basic question to be resolved	
2. Stakeholders, decision makers and project resourcing ▪ Sponsors: ▪ Steering: ▪ Leads: ▪ Key Stakeholders: ▪ Delivery team: ▪ Support:	**3. Desired outputs and criteria for success** Output: ▪ - Success criteria: ▪ -
4. Scope of the work In scope: ▪ - Out of scope: ▪ -	**5. Outline timings and milestones**
6. Context / background	**7. Constraints and risks/dependencies/interfaces** Challenges: ▪ - Risks: ▪ -

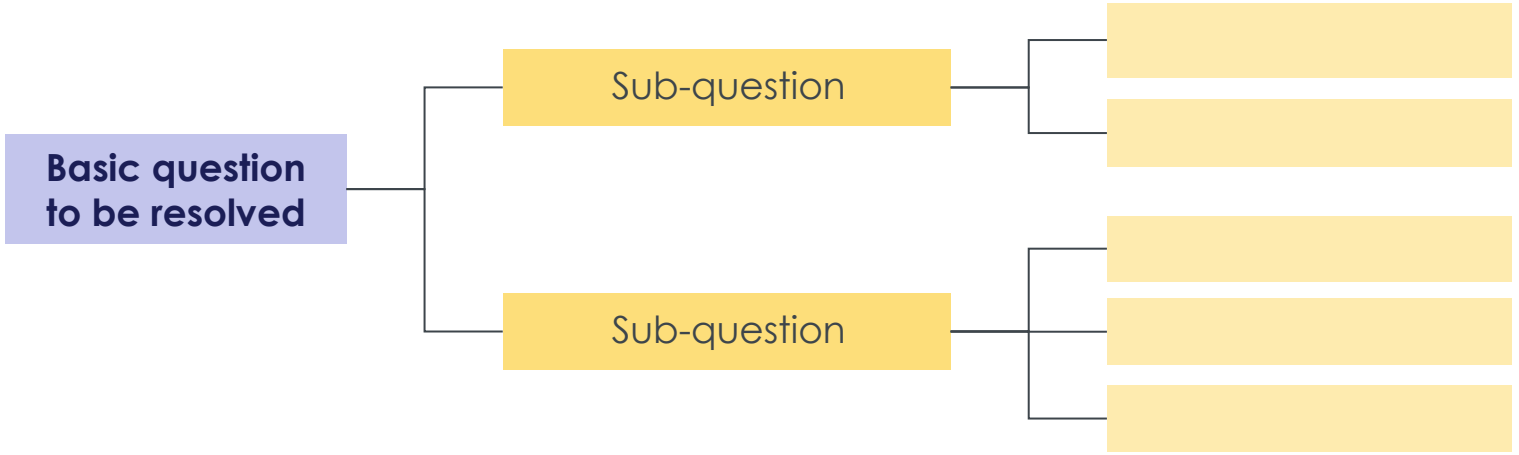
Structuring the problem: Issue Trees

Issue Trees*

INTRODUCTION

Once you've written the problem statement, the next step is to break the problem down into manageable chunks. The issue tree helps you to:

1. Break the work down into clear, separate workstreams
2. Give you confidence that you've looked at the full extent of the project

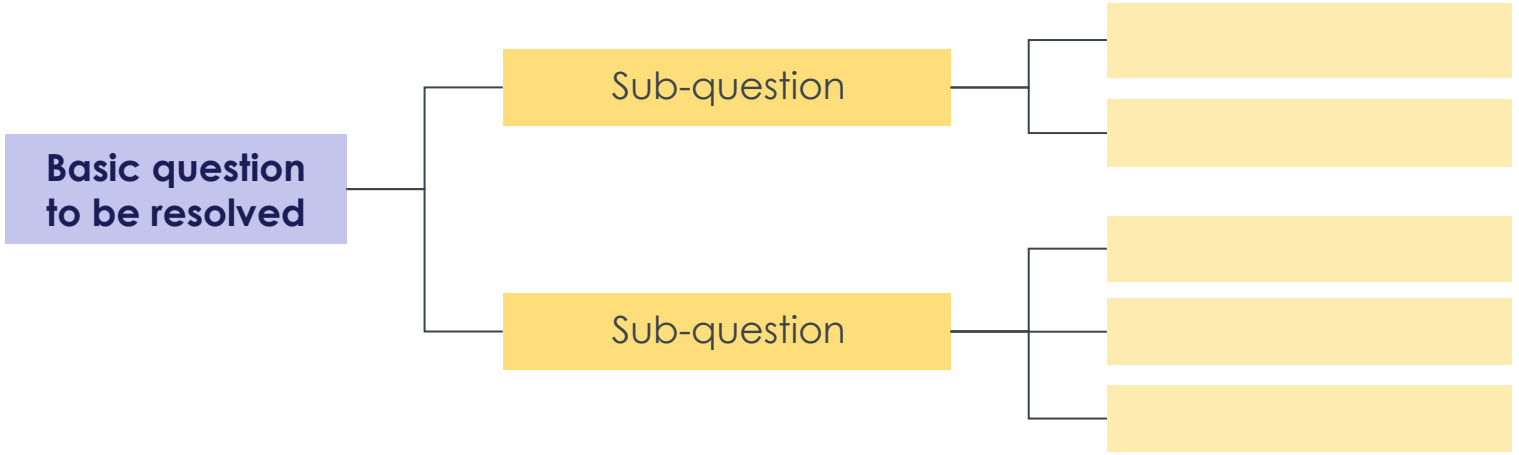


*Issue = question: Do not confuse with issues on a risk log, or an arising operational issue

How Issue Trees work

BREAKING DOWN YOUR PROBLEM

An Issue Tree works by setting out the 'basic question to be resolved' on the left-hand side of the page, then breaking out this question into increasingly more specific questions as you go from left to right

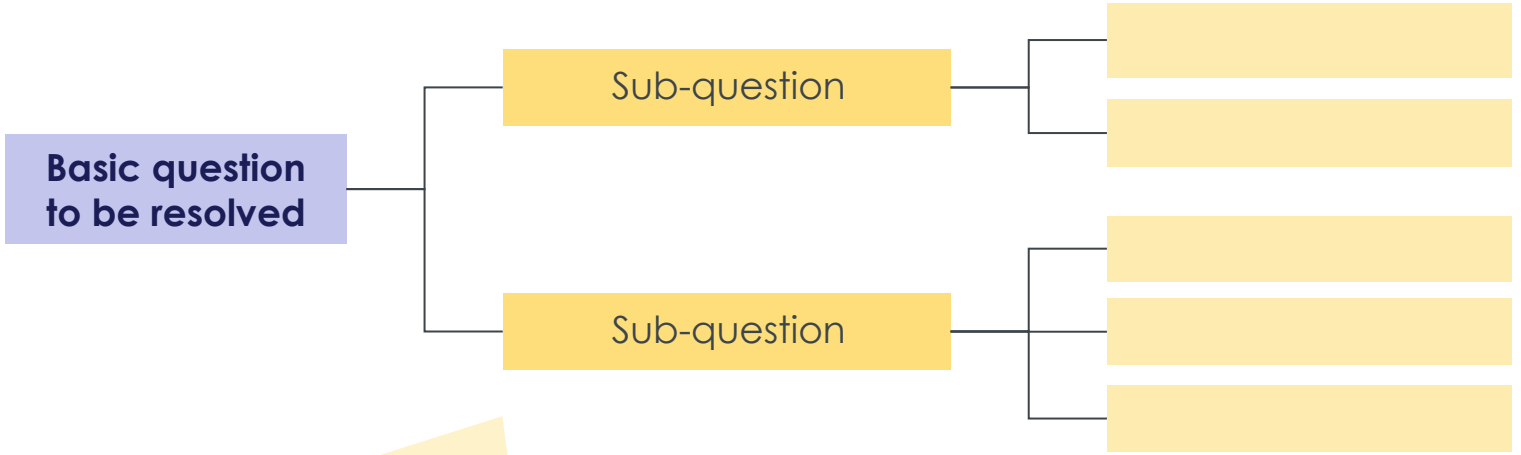


How Issue Trees work

BREAKING DOWN YOUR PROBLEM

An Issue Tree sets out the 'basic question to be resolved' and breaks it down into increasingly more specific questions.

The right-hand side of an Issue Tree shows a set of areas of potential experiments / solutions / analyses / workstreams

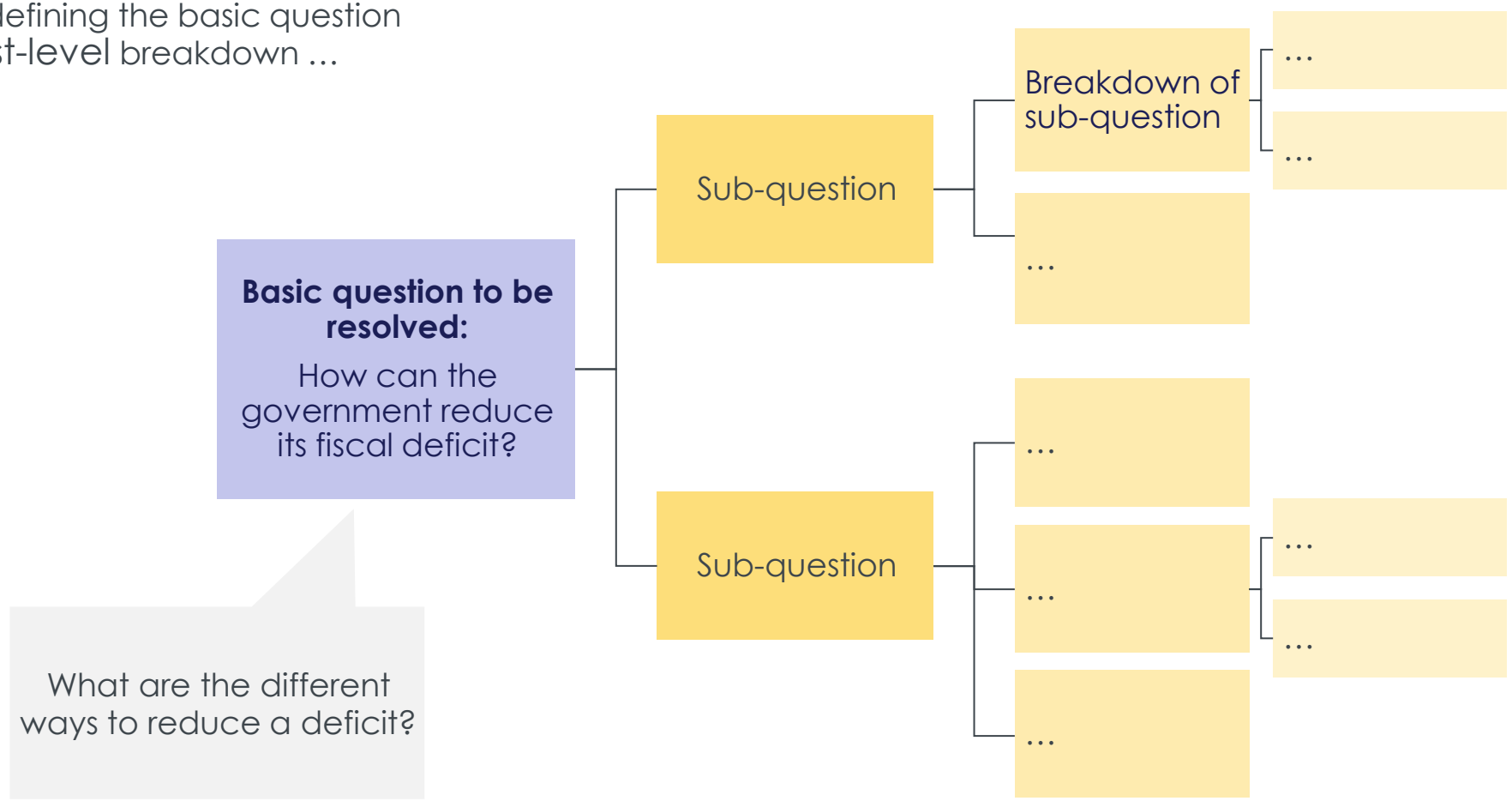


Good Issue Trees have questions at each level (vertical cut through the Tree) which:

a) can be answered without reference to other questions in the same level (**M**utually **E**xclusive questions)
b) when taken together, add up to the question to the left (**C**ollectively **E**xhaustive questions)

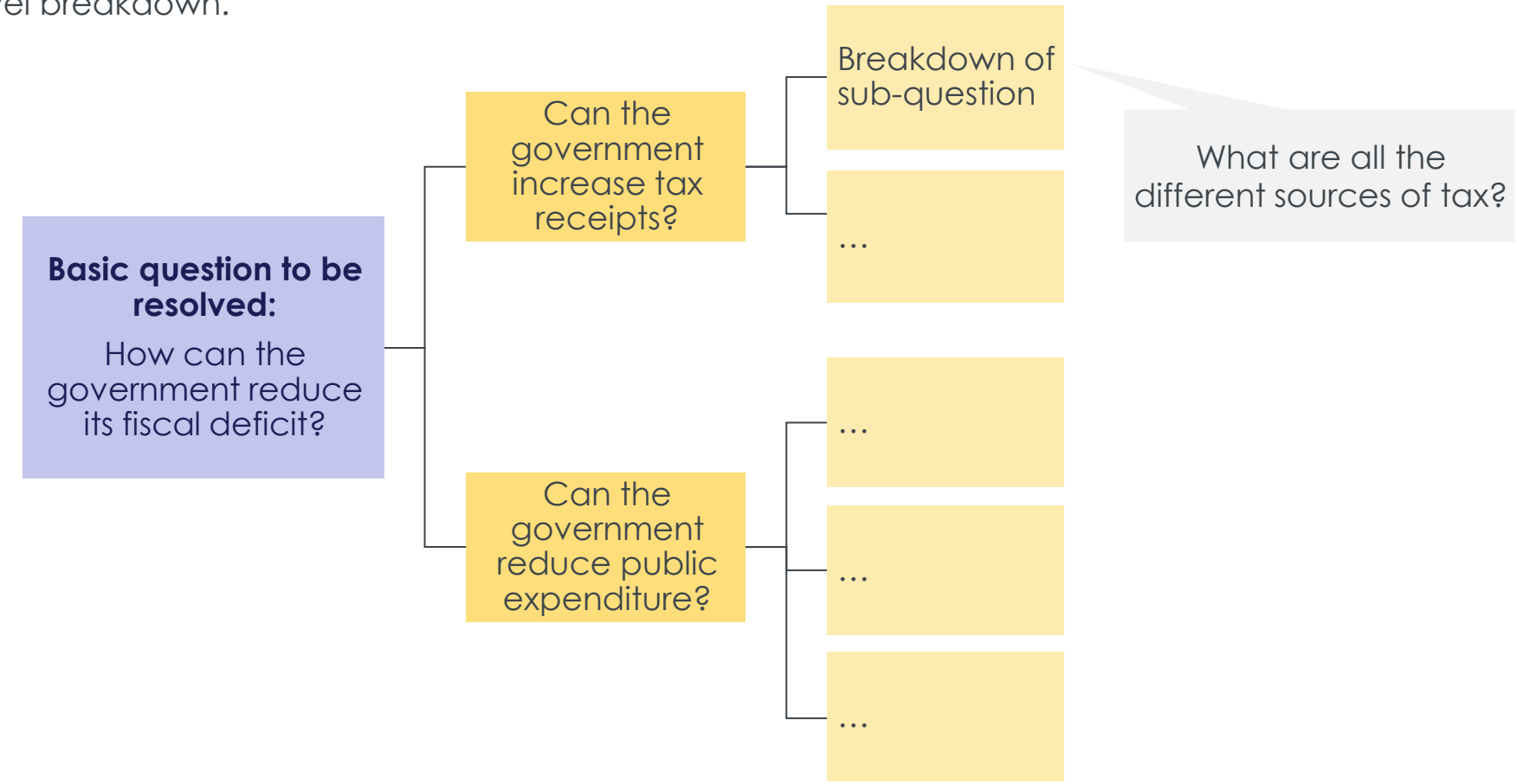
Simple Issue Tree example (1/3)

Start your Issue Tree by defining the basic question and think about your first-level breakdown …



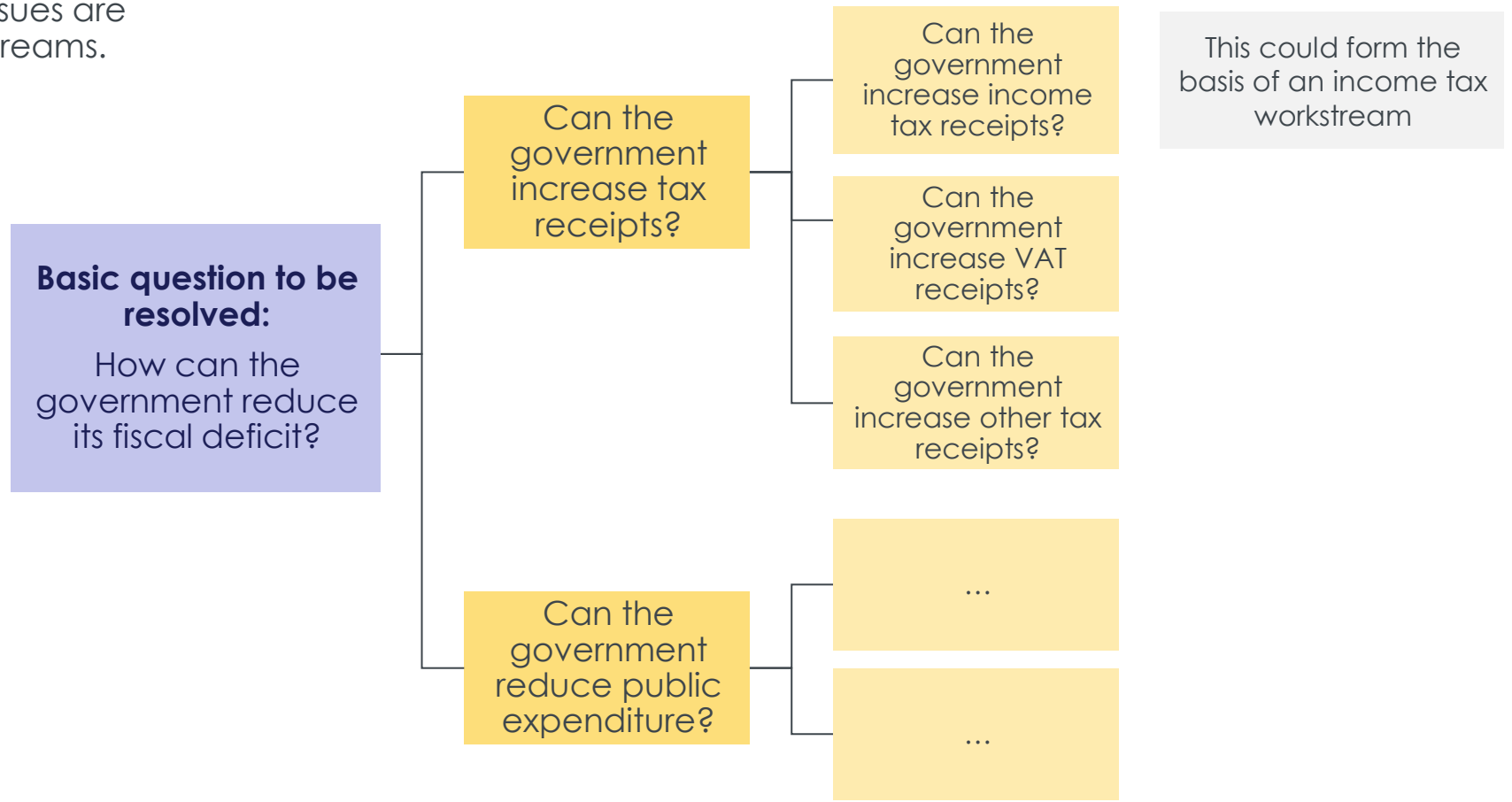
Simple Issue Tree example (2/3)

…then work through your second-level breakdown.



Simple Issue Tree example (3/3)

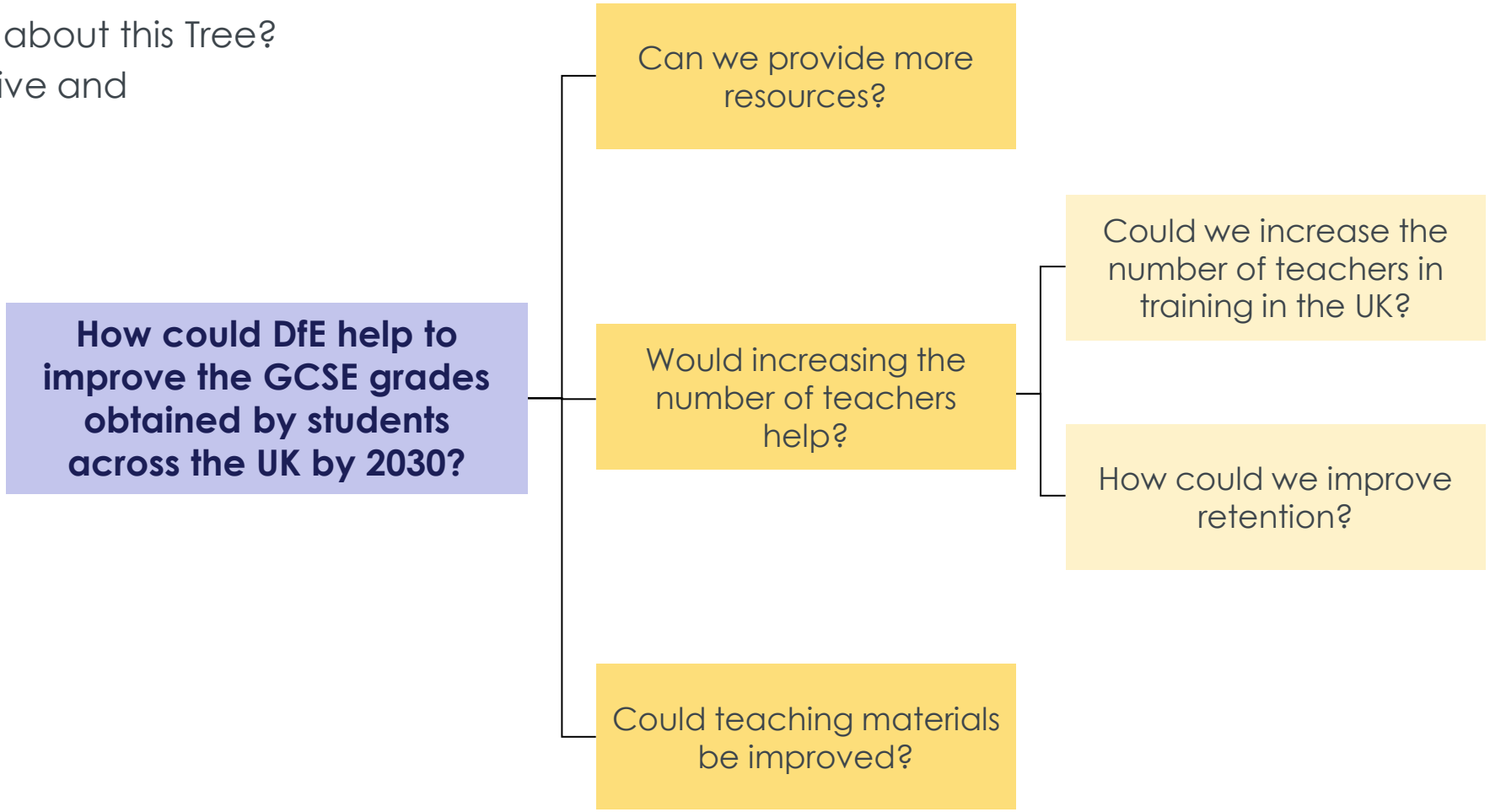
Stop breaking down when your sub-issues are sufficient to drive independent workstreams.



A weak Issue Tree

DISCUSSION

- What is weak or ineffective about this Tree?
- Is it 'MECE' (Mutually Exclusive and Collectively Exhaustive)?

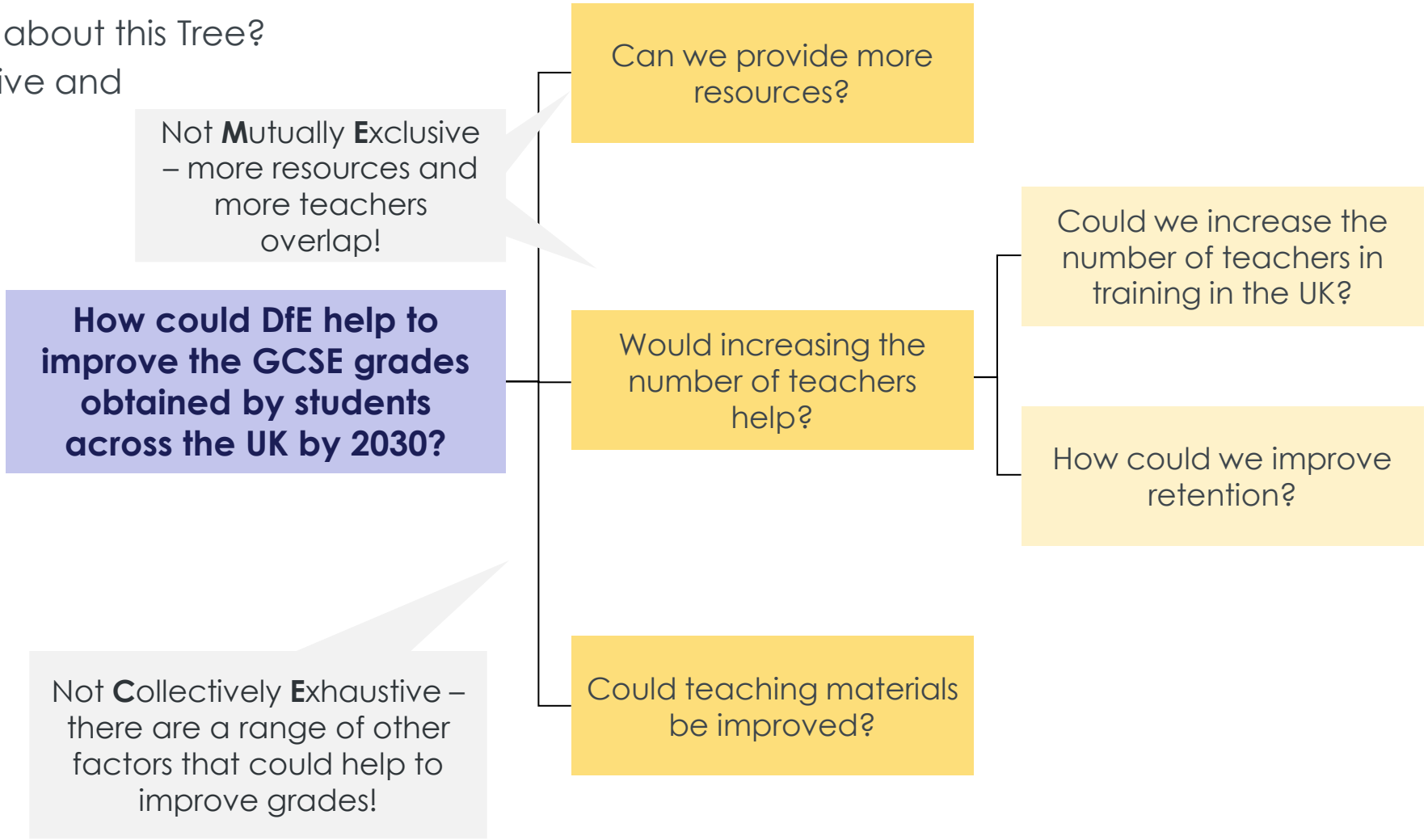


Source: illustrative team analysis
DfE = Department of Education

A weak Issue Tree

DISCUSSION

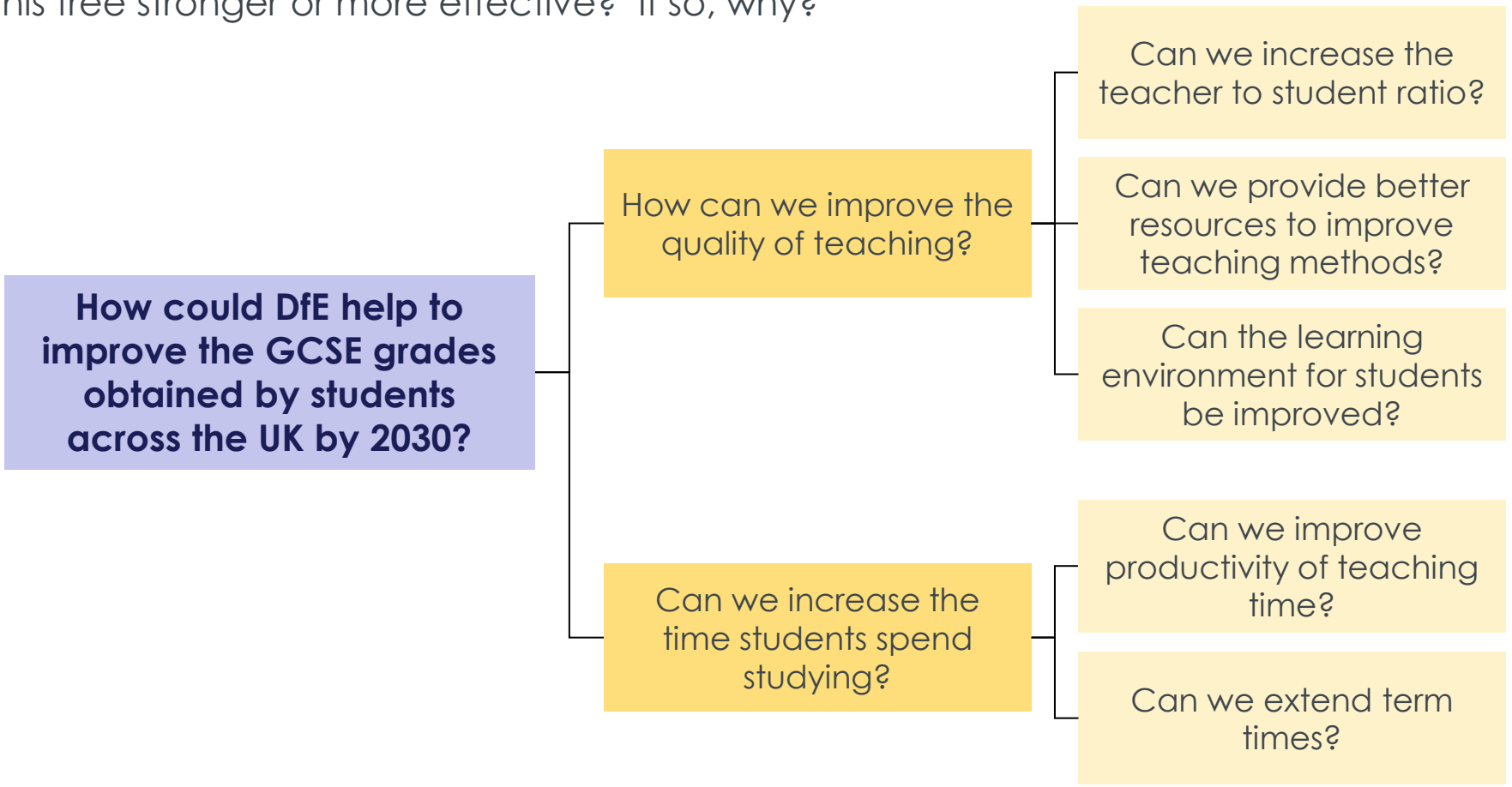
- What is weak or ineffective about this Tree?
- Is it 'MECE' (Mutually Exclusive and Collectively Exhaustive)?



An improved Issue Tree

DISCUSSION

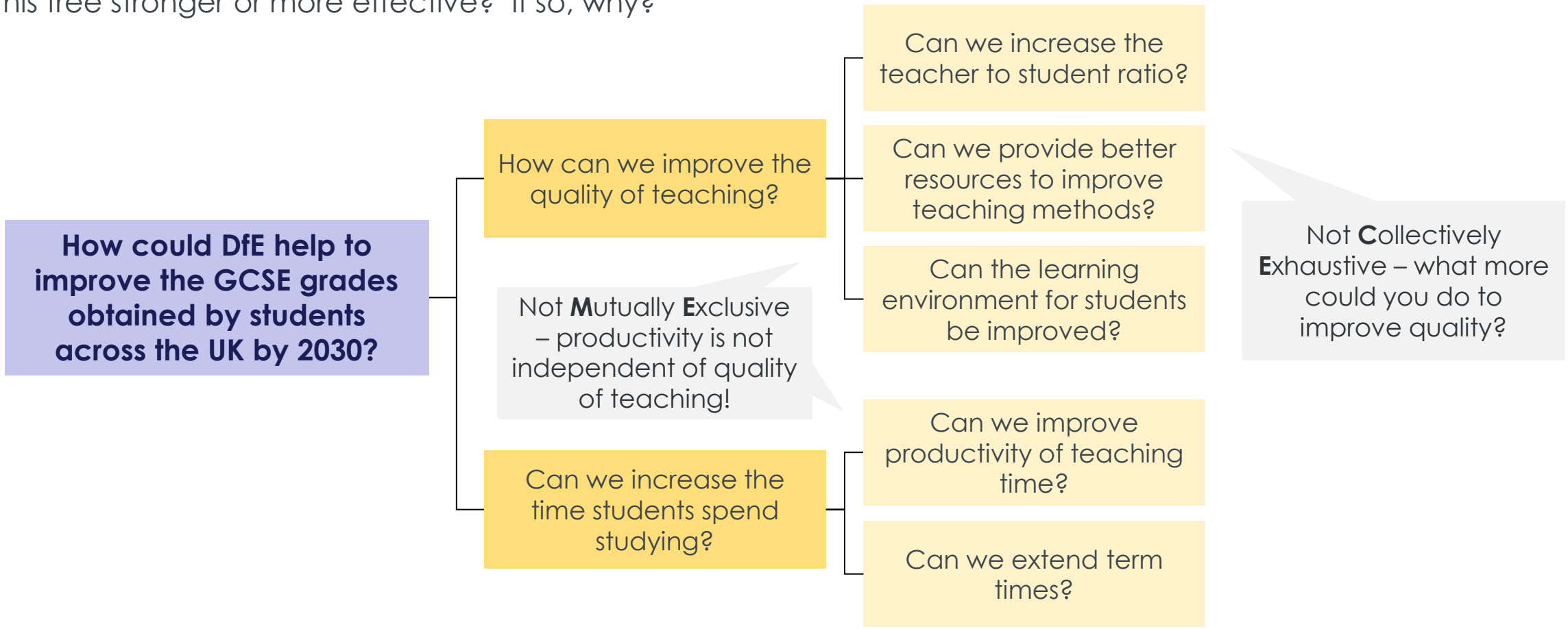
- Is this tree stronger or more effective? If so, why?



An improved Issue Tree

DISCUSSION

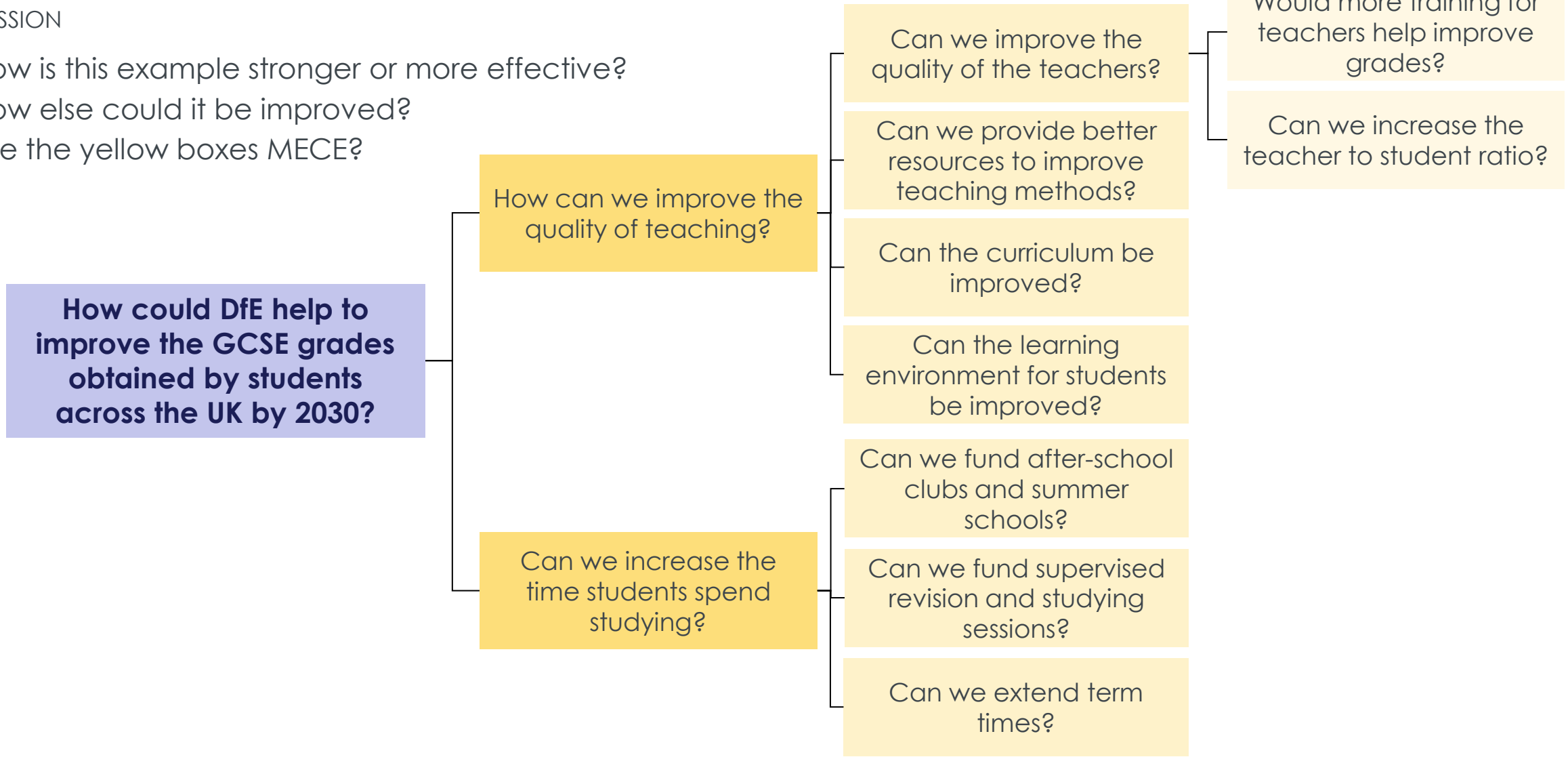
- Is this tree stronger or more effective? If so, why?



A further improved Issue Tree

DISCUSSION

- How is this example stronger or more effective?
- How else could it be improved?
- Are the yellow boxes MECE?

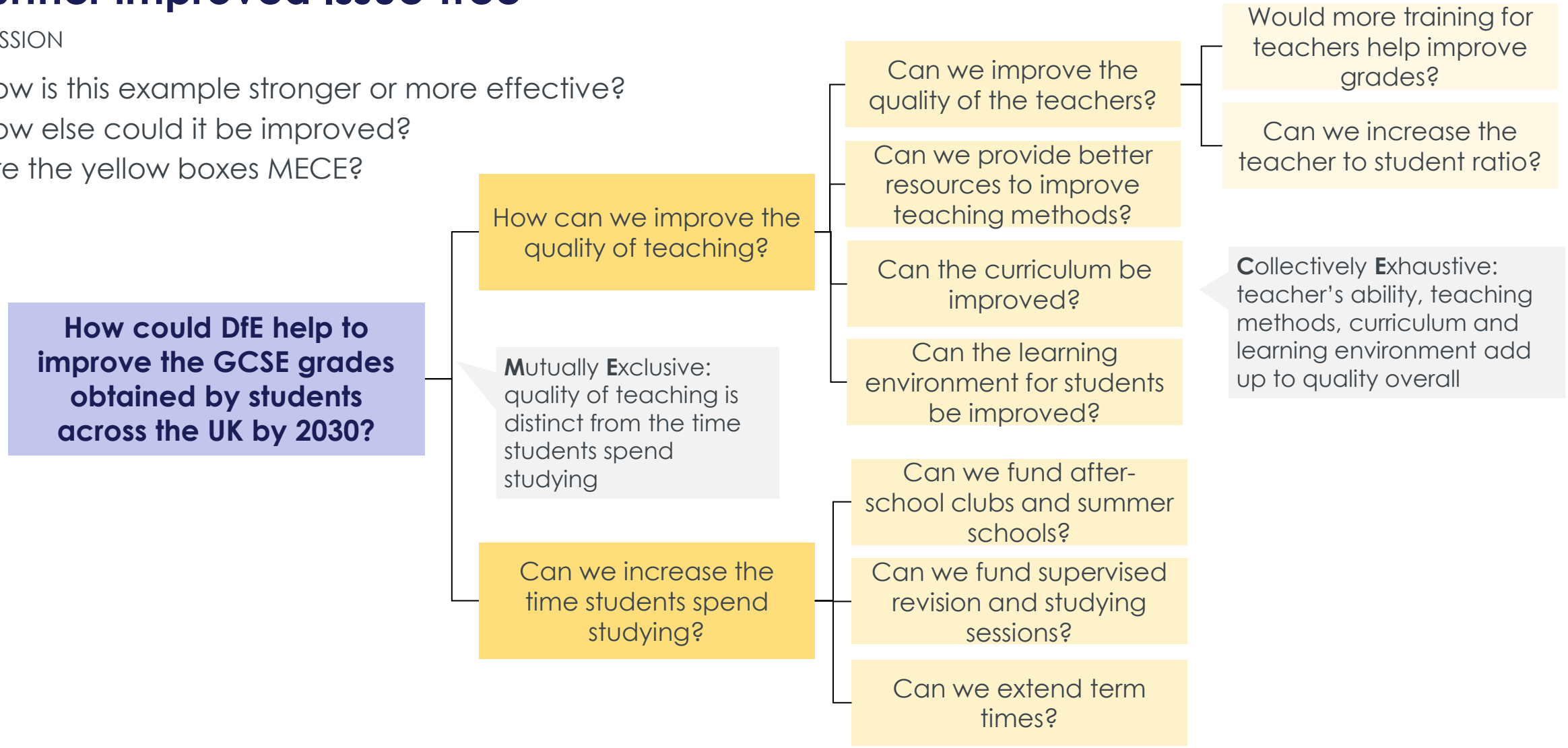


A further improved Issue Tree

WORKED EXAMPLE

DISCUSSION

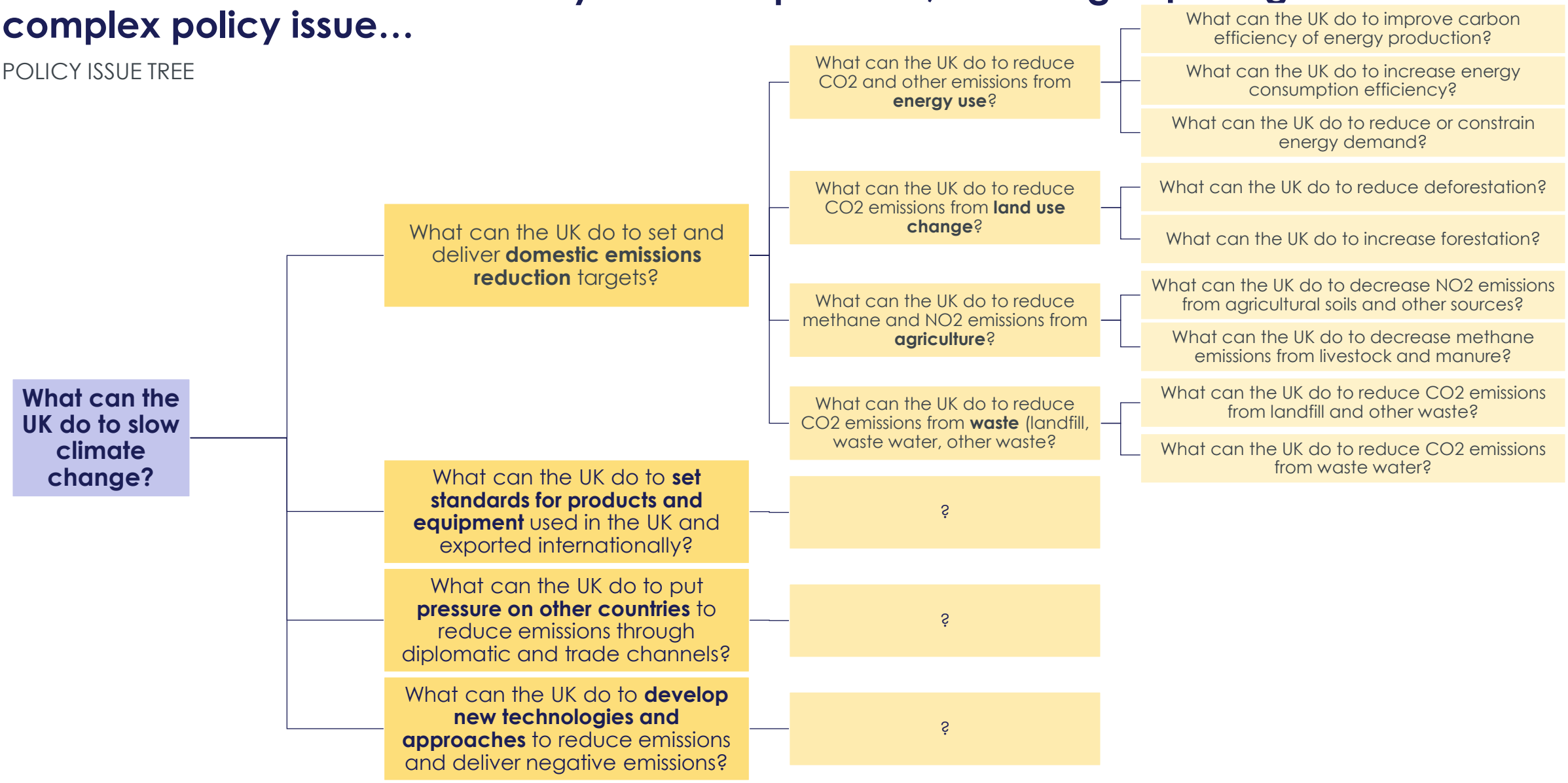
- How is this example stronger or more effective?
- How else could it be improved?
- Are the yellow boxes MECE?



Issue Trees can be used for many different questions, including exploring a complex policy issue…

DRAFT EXAMPLE

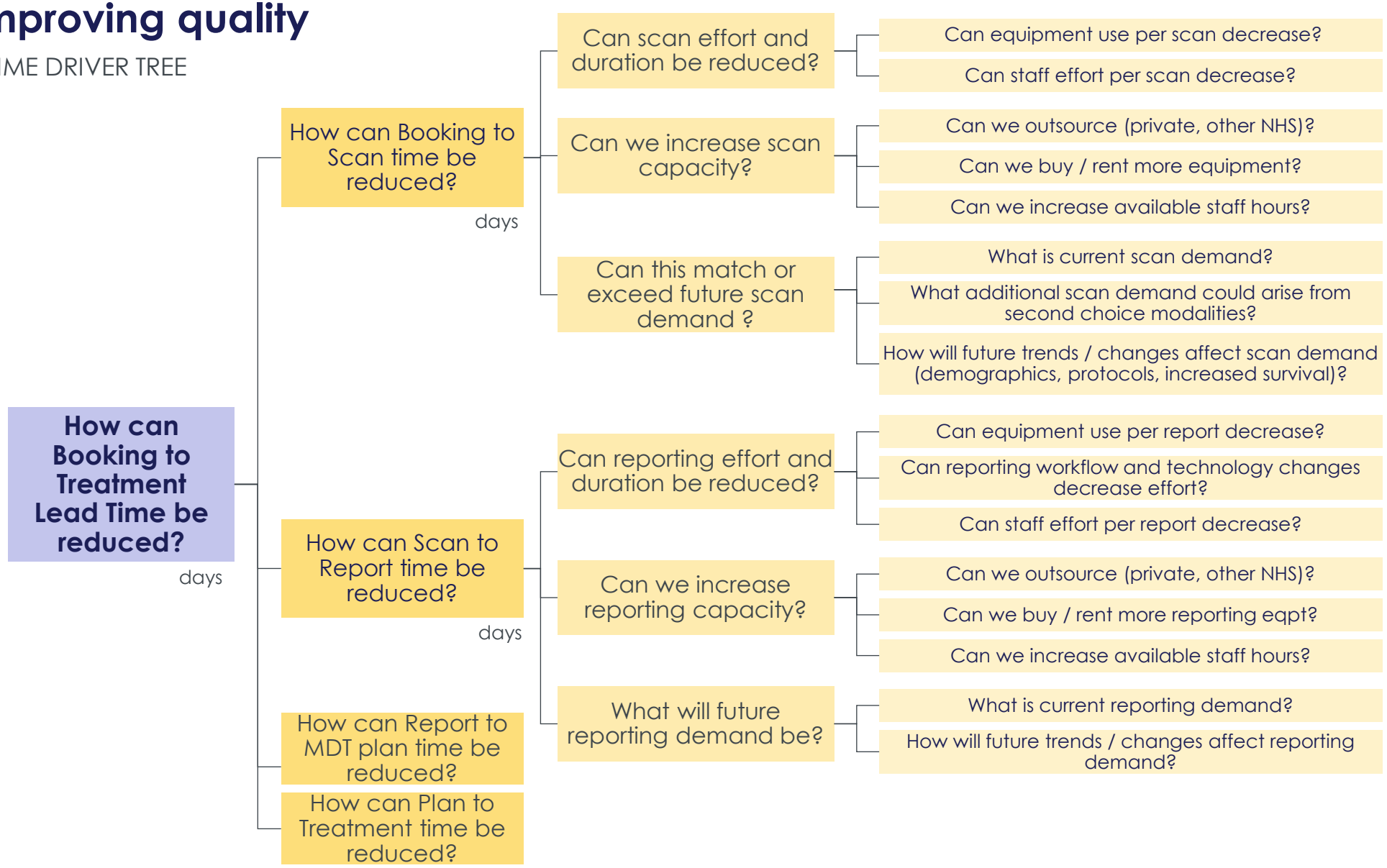
POLICY ISSUE TREE



…or exploring process improvement drivers for reducing waiting time or cost, or improving quality

PROCESS EXAMPLE

RADIOLOGY LEAD TIME DRIVER TREE

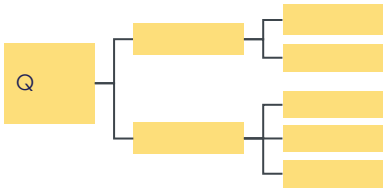


A few things to keep in mind when using Issue Trees to structure your work

ISSUE TREES KEY POINTS

1. Get to **individual tasks or workstreams** – experiments, qualitative and/or quantitative analysis, or research
2. Check for **independent and complete** sections (MECE)
3. Keep **iterating**
4. Use existing **frameworks** where possible
5. Or try grouping structurally, time-based or in categories
6. Breakdown the **content of the question**, don't put project management or PDS questions here
7. There's **no right answer**

Reference: How to use Issue Trees and the PPT template



What is this tool?

An Issue Tree breaks the question down (from the PDS) into manageable chunks. This creates clear, separate workstreams and gives you confidence that you've looked at the full extent of the problem.

When to use this tool?

Keep iterating the Tree throughout the project as you develop the answer. The first draft will help unlock the key questions and lead to hypotheses, which in turn will allow the next iteration of the Issue Tree to get to the heart of the problem. There is no single right answer – although it is important for the Tree to be MECE, it does not need to be perfect and there are multiple 'right answers'. They can also be useful within a project to set up a specific analysis, think through challenges for the first time, or decide priority areas for action.

Tips for developing and using Issue Trees

- You've reached the **right level of disaggregation** when the questions are specific enough to assign resources to them as tasks or workstreams – typically experiments, qualitative and / or quantitative analysis, or research. If you have more than ~4 levels of the Tree, consider if you've gone into too much detail. Remember, the Tree doesn't have to be perfect – just good enough to lead to a workplan.
- Use **existing frameworks** where appropriate: financial profit = revenue minus costs; similarly for process improvement quality, cost and lead time or options appraisal cost / benefit. And where appropriate, an Issue Tree should work mathematically. This helps ensure MECE-ness.
- Aim to **capture existing preconceptions / myths** so they can be discussed.
- **Issue Trees are useful in making your case to stakeholders** – not to present to them, but to demonstrate thinking.

Mentoring questions for working with Issue Trees

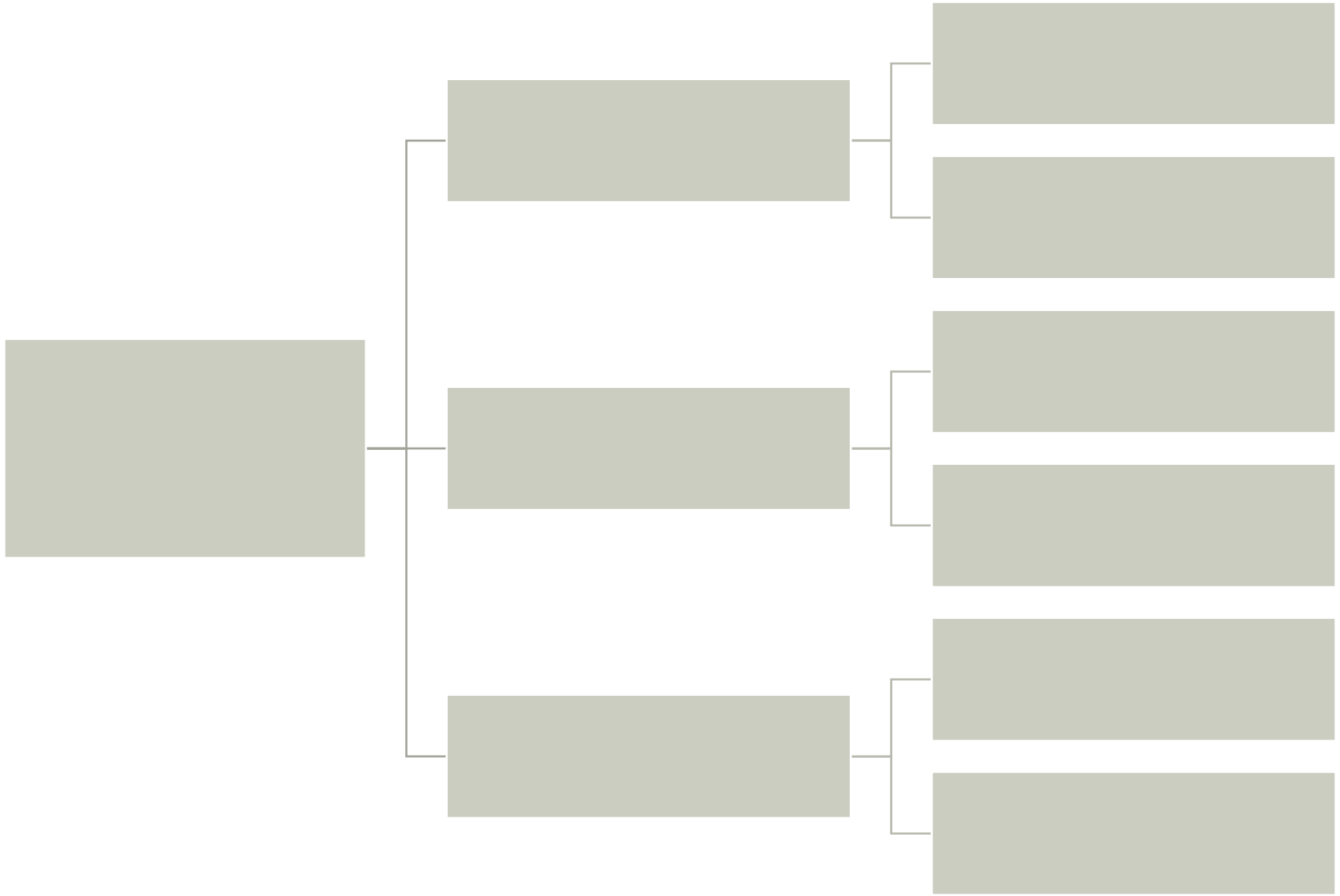
- Are the questions at each level (a vertical cut) **independent and complete**, aka MECE (Mutually Exclusive and Collectively Exhaustive)? This avoids workstreams becoming tangled or important analyses being missed.
- If you're stuck, think about a **natural way of grouping the topic** – is it structural (divide a whole into parts), time based (sequence or cause and effect), or are there categories (can you group like things).
- If you have **many different ways of grouping the topic**, think about which sequence of grouping helps you to create independent (Mutually Exclusive) workstreams – structural then framework, or framework then structural?
- Focus on **content, not process** – "What data is available?" and "How should we evaluate options?" are not valid questions for solving the problem. Nor are project management questions like "Who are my stakeholders?". Whereas "By how much can productivity be improved?" is a content question.

PowerPoint Instructions

- This Issue Tree is created using PPT's 'SmartArt' illustration feature, using a 'horizontal hierarchy' layout to create a horizontal tree.
- Either copy across the Tree object to your own presentation, or insert the same SmartArt type directly. When you click on the Tree, a text box will appear to the left where you can easily edit text and use TAB and ENTER to create new lines (boxes) and indent them to the level you want.
- Two 'SmartArt tools' tabs will also appear in the ribbon when you click on the Tree so you can format and design the Tree as you wish.
- You can also double 'ungroup' to convert to normal shapes.

Issue Tree template

Click the Smart Art to open the Text Pane in bullet-point view and add / indent elements (you may need to click the arrow control on the left side of the graphic to open the Text Pane).



Issue Tree exercise

ACTIVITY

In pairs or small groups, spend 20 minutes preparing an Issue Tree based on your own project.

1. **Use your PDS to guide you.**
2. **Work to 'good enough' initially and then refine** – it doesn't have to be perfect first time.

We will wrap up with sharing for 5 minutes as a whole group.

Templates available here: https://thepsc.co.uk/capability-building/module/psat-issue-tree/

Synthesising insight (2)

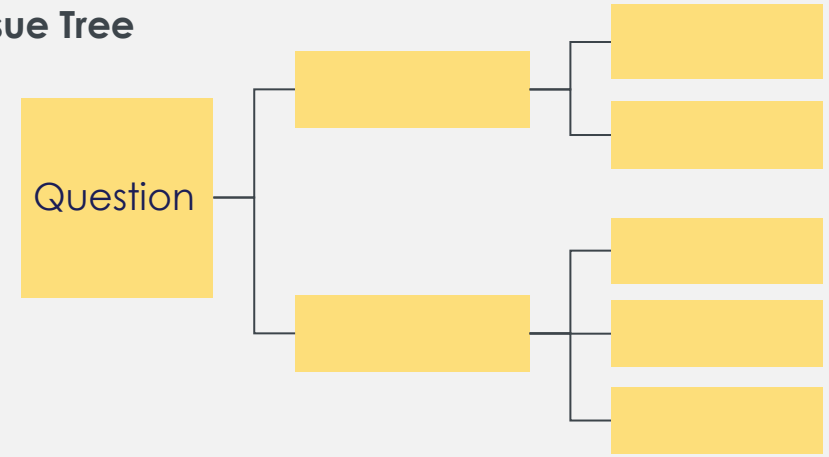
Where does SCQA relate to the tools we've just learnt – PDS and Issue Trees?

SCQA TOOL

Situation	• How it used to be….
Complication	• What's changed is….
Question	• Question to be resolved
Outcome	• Desired outcome
Answer	• Current working answer

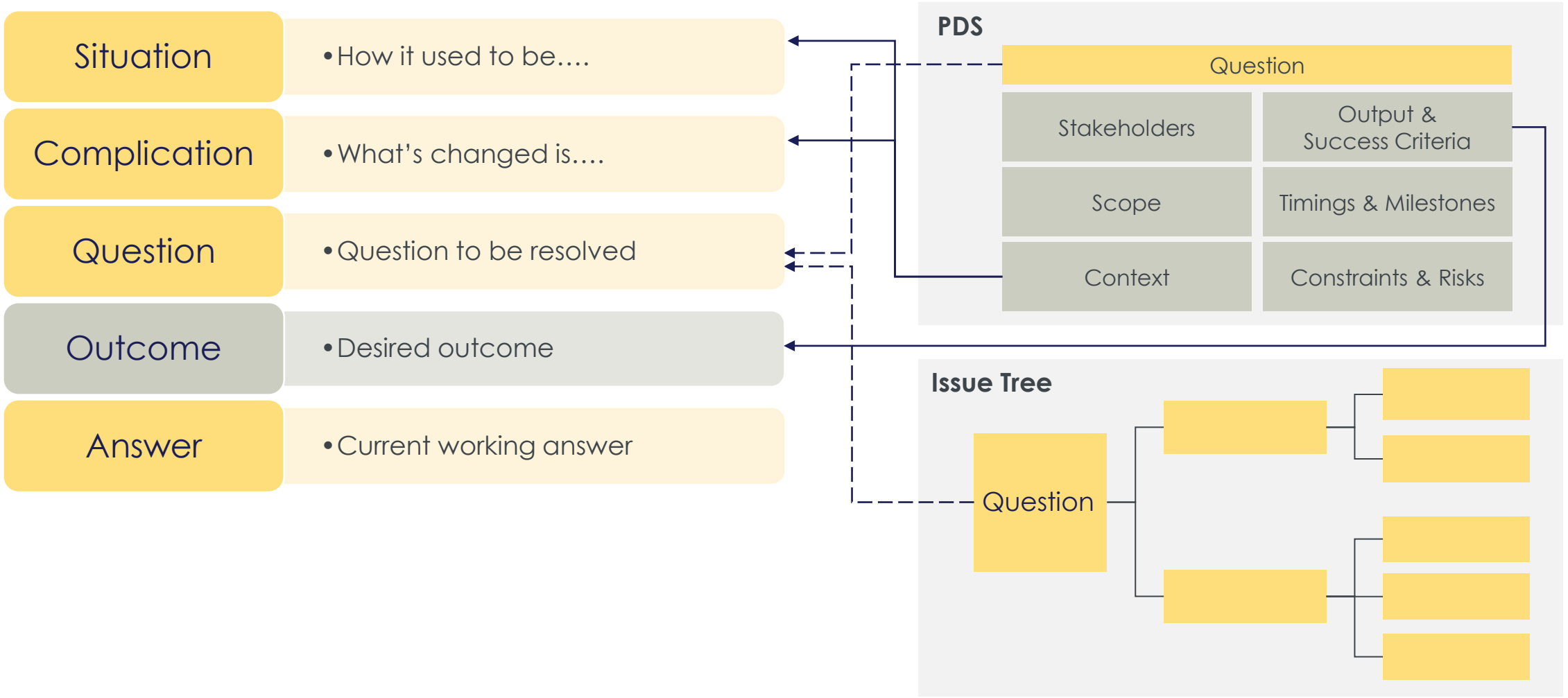
PDS

Issue Tree



Where does SCQA relate to the tools we've just learnt – PDS and Issue Trees?

SCQA TOOL



Take 5 minutes individually for your project to update the single sentences you wrote this morning for each of the elements

We'll ask for a couple of volunteers to share with the group

Situation	• How it used to be…. (PDS)
Complication	• What's changed is…. (PDS)
Question	• Question to be resolved (PDS)
Outcome	• Desired outcome (PDS)
Answer	• Current working answer

The Strategic Thinking Programme

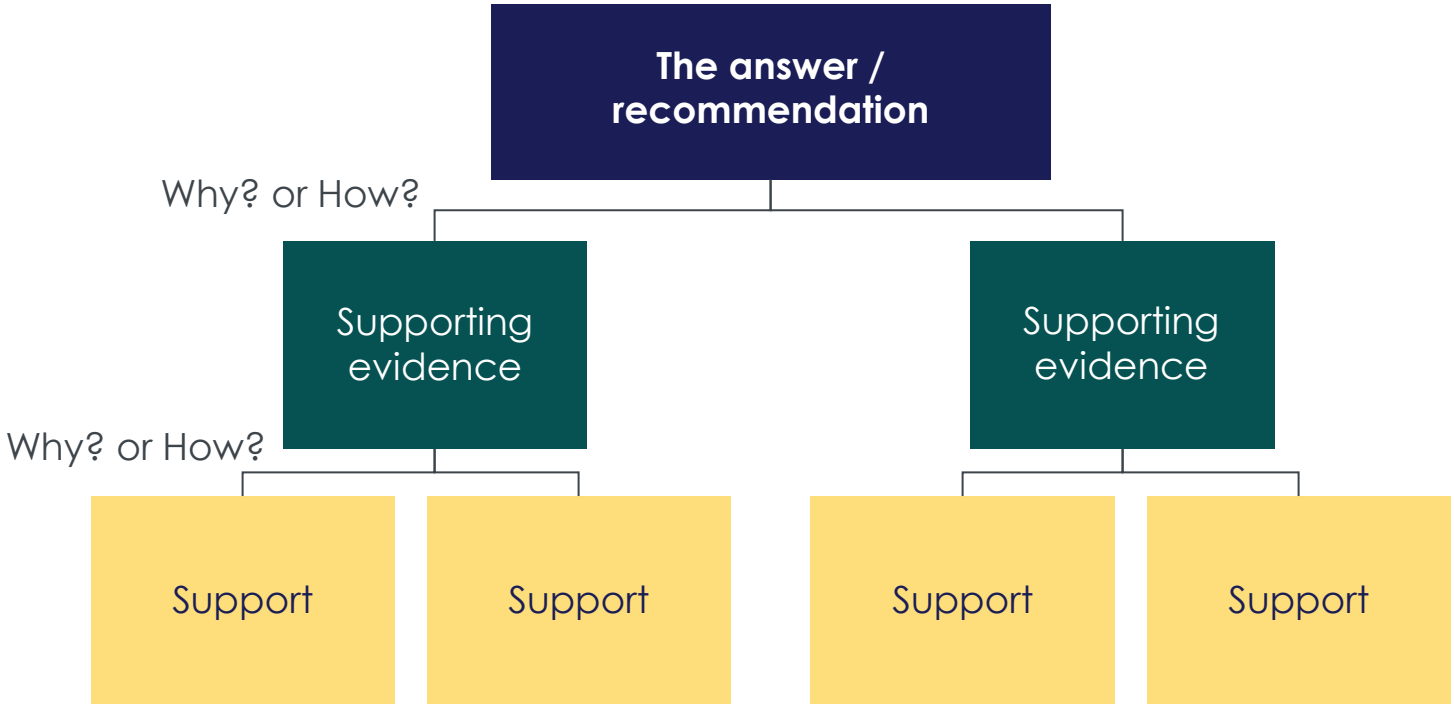
Pre-work	Challenging Environments	Understanding the Challenge	Developing Insight	Stakeholder Engagement
• Draft Problem Definition Sheet	• Introduction • Challenging environments • Our environment • Synthesising Insight (1)	• Defining the Problem (Problem Definition Sheet) • Structuring the Problem (Issue Trees) • Synthesising Insight (2)	• Developing insight (Hypothesis Trees) • Planning the work (boat chart workplans) • Options Appraisal • Synthesising Insight (3)	• Stakeholder Engagement • Influencing Styles • Synthesising Insight (4) – Communicating with stakeholders • Review & Reflect

Developing Insight: Hypothesis Trees

Hypothesis Trees help us order our thinking by proposing a likely answer to our PDS question and laying out the supporting evidence

HYPOTHESIS TREES – INTRODUCTION

- They can be used to **organise your thoughts** and highlight where the gaps in your logic are to:
  - clarify thinking
  - debunk myths
  - synthesise recommendations
- This **avoids jumping to the solution**, and makes clear how the work ties together (and if it doesn't, may identify lower priority or unnecessary work)
- BUT… it's vital not to be 'wedded to your solution' and **iterate** whenever the facts don't support the current working hypothesis.



We develop a Hypothesis Tree by asking “Why do we believe this?” at each level until it’s self-evident or it is a statement you can test

DEVELOPING A HYPOTHESIS TREE

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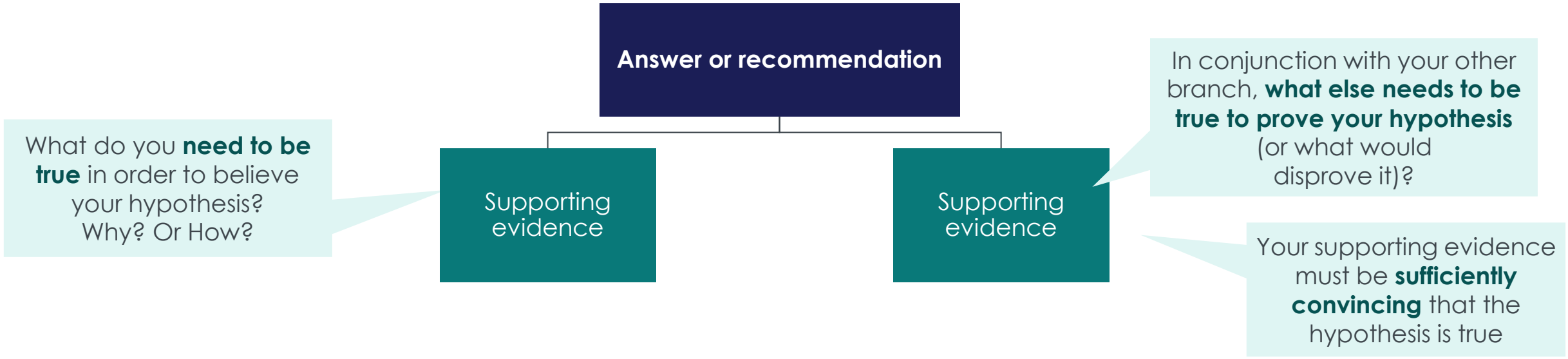
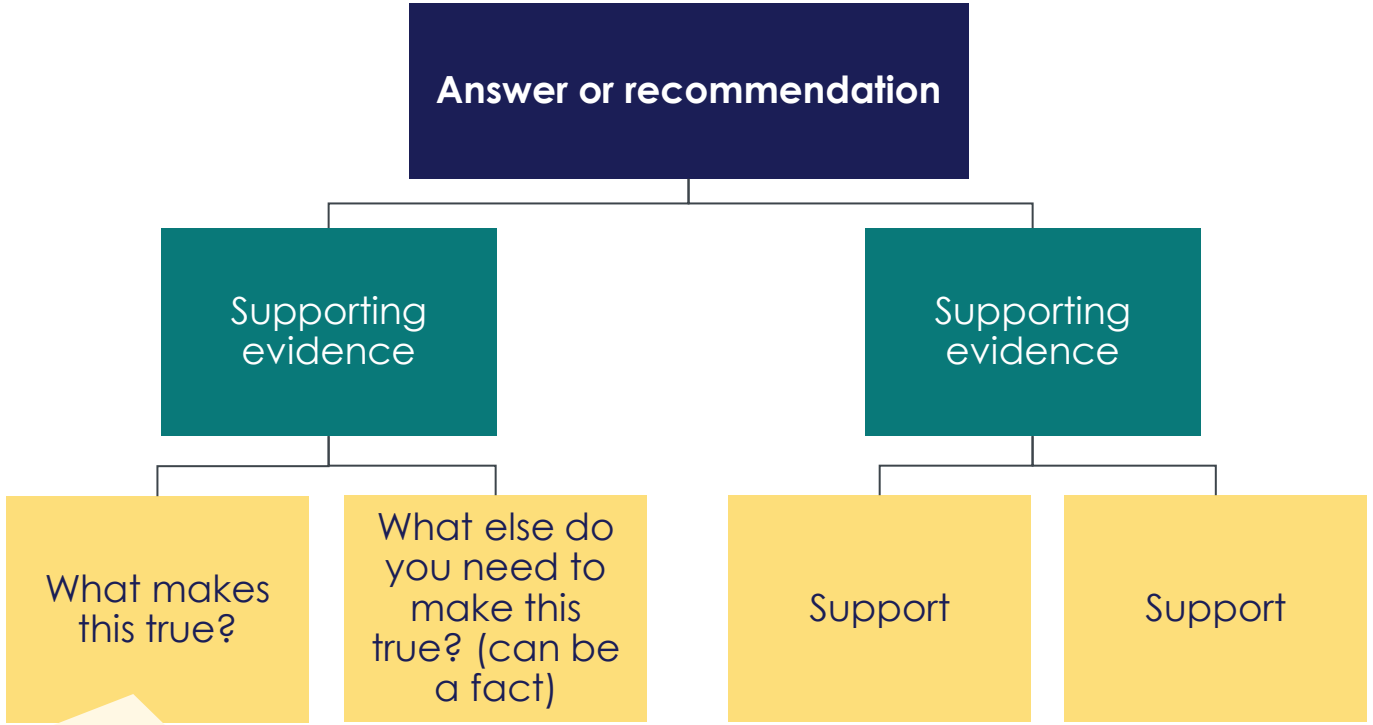
DEVELOPING A HYPOTHESIS TREE



We develop a Hypothesis Tree by asking "Why do we believe this?" at each level until it's self-evident or it is a statement you can test

DEVELOPING A HYPOTHESIS TREE



You know you've reached your lowest level when you are either **stating facts** that are self-evident, not opinion / drawn conclusions, or points which you are **planning to test** through your work

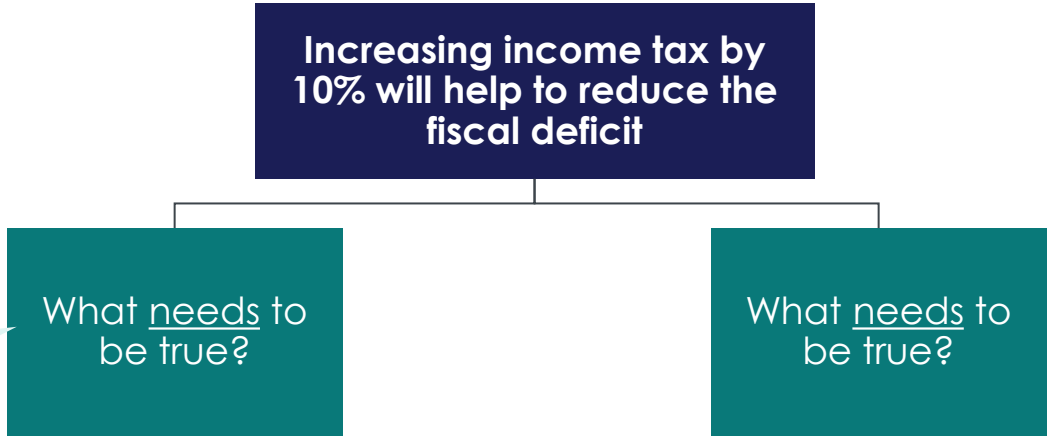
- Ideas at **any level** in the pyramid must always be a **'summary' hypothesis** based on the ideas grouped below
- Ideas in each grouping must always be the **same kind of idea**
- Ideas in each grouping must always be **logically ordered**

Illustrative example: Reducing fiscal deficit

DEVELOPING A HYPOTHESIS TREE – ILLUSTRATIVE EXAMPLE

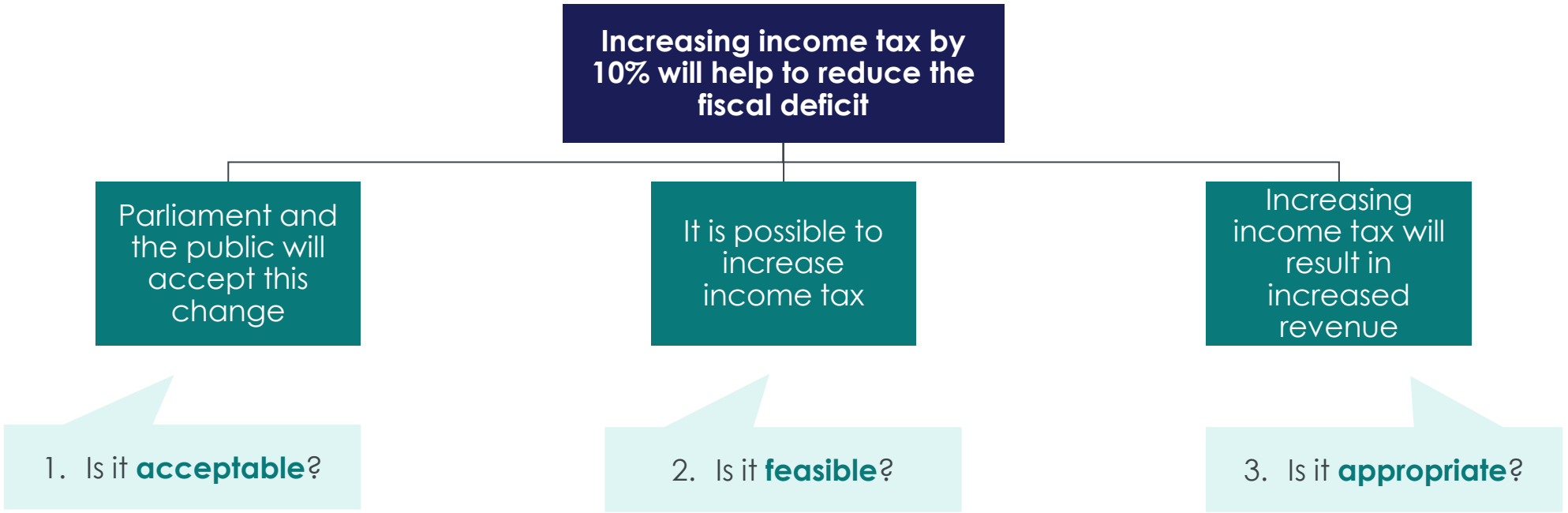
A helpful framework to use for your first level is:

1. Is it **acceptable**?
2. Is it **feasible**?
3. Is it **appropriate**?



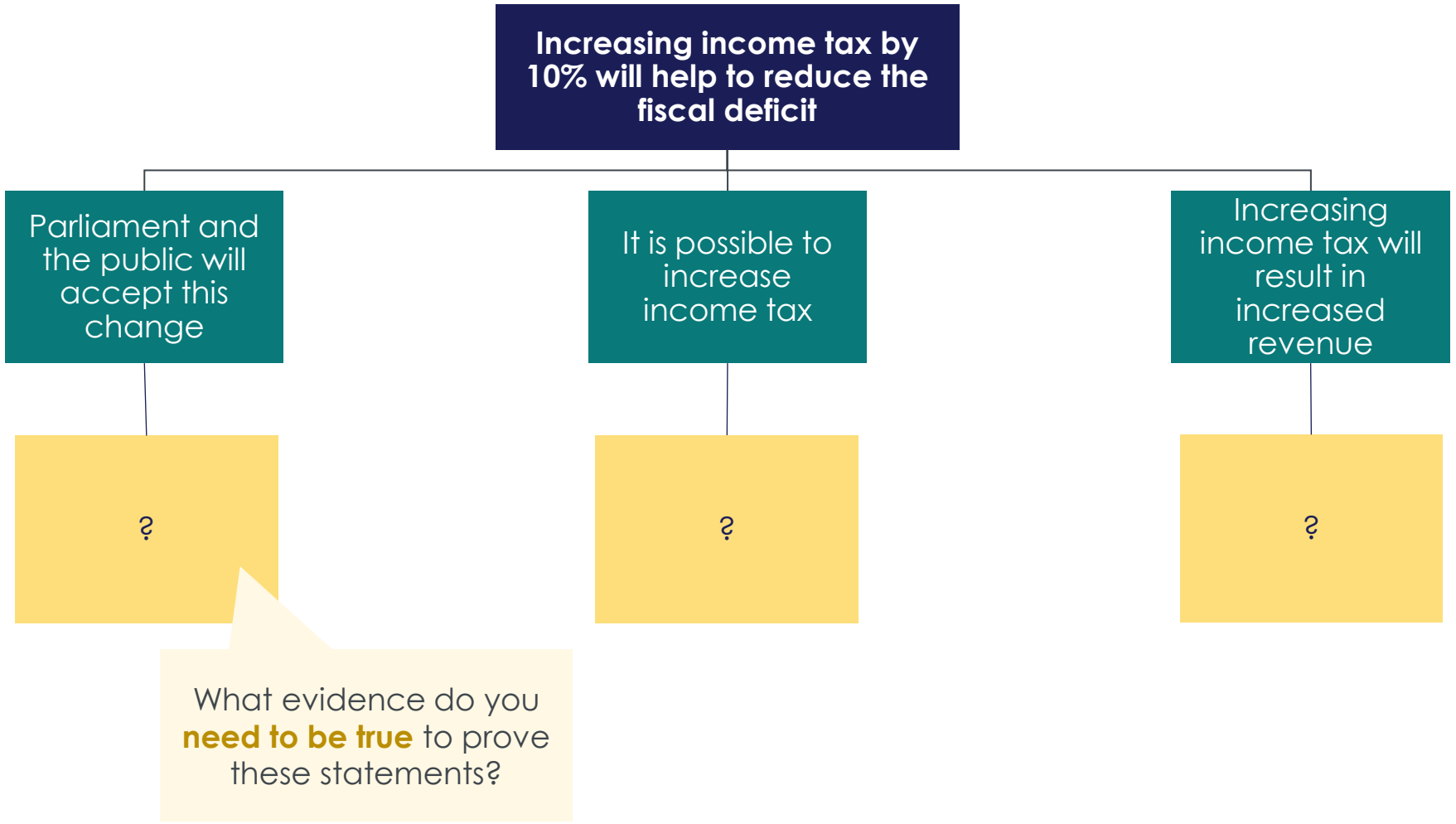
Illustrative example: Reducing fiscal deficit

DEVELOPING A HYPOTHESIS TREE – ILLUSTRATIVE EXAMPLE



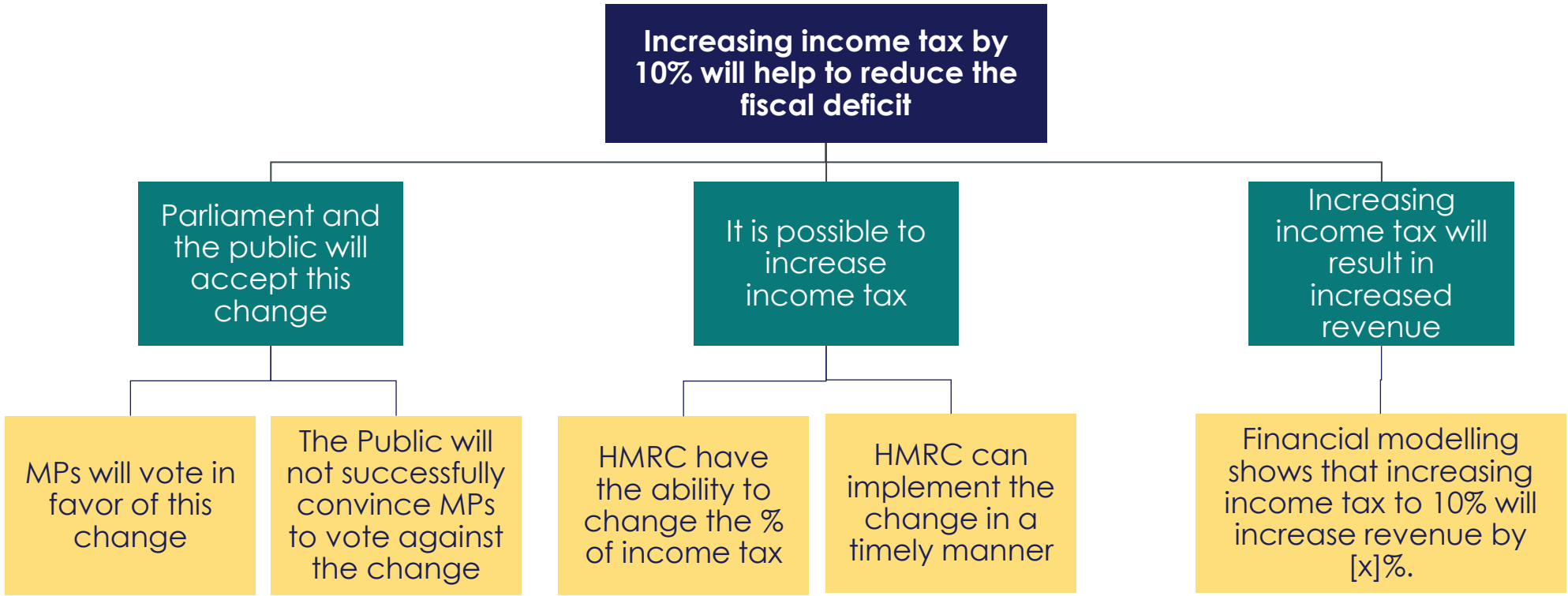
Illustrative example: Reducing fiscal deficit

DEVELOPING A HYPOTHESIS TREE – ILLUSTRATIVE EXAMPLE



Illustrative example: Reducing fiscal deficit

DEVELOPING A HYPOTHESIS TREE – ILLUSTRATIVE EXAMPLE



You would now need to answer: **Are these statements true?**
You would now go away and complete the required analysis to either prove or disprove the statements

Hypothesis testing is common in many professions – we will look at two examples

Hypothesis testing in criminal justice

Hypothesis testing and medical diagnosis

How do criminal investigators use exhaustive versus hypothesis-based processes?

EXAMPLE 1: HYPOTHESIS TESTING AND CRIMINAL JUSTICE

When investigating a crime, what steps do investigators take that are **exhaustive**, for example, not hypothesis-based)?

What steps do investigators take that are **hypothesis-based**?

Once hypotheses are formed, **how are these tested** in the criminal justice system?

How do GPs diagnose their patient's illness?

EXAMPLE 2: HYPOTHESIS TESTING AND MEDICAL DIAGNOSIS

A 50-year-old man sees this advert (left) and visits his GP, stating that he has a cough that he has had for more than 3 weeks, and that he is worried that it is not getting better

How might the GP **diagnose the cause** of the problem?

What hypotheses might the GP test, and how might they **test these**?

The GP can use a Hypothesis Tree to rule out an unlikely (but serious) diagnosis

HYPOTHESIS EXAMPLE: MEDICAL DIAGNOSIS RISK

"My hypothesis is that, although the risk that this patient has asthma is small, there is sufficient risk that I should refer him for a chest X-ray to rule this out."

Supporting evidence

- The patient has some symptoms that are consistent with asthma
  - Why?
    - Patient has had cough for more than 3 weeks
    - Patient says that he has recently lost weight
    - Patient's age (50) elevates the risk
- The patient's symptoms are not sufficiently consistent with asthma for more urgent action to be appropriate
  - Why?
    - Patient has not been coughing up blood
    - Patient has recently had a respiratory infection
- Chest X-ray is the recommended diagnostic approach if there is a small but significant risk of asthma
  - Why?
    - Clinical risk associated with X-ray is very low relative to benefit if asthma is identified

Review: Hypothesis testing is common in many professions

HYPOTHESIS TESTING EXAMPLES

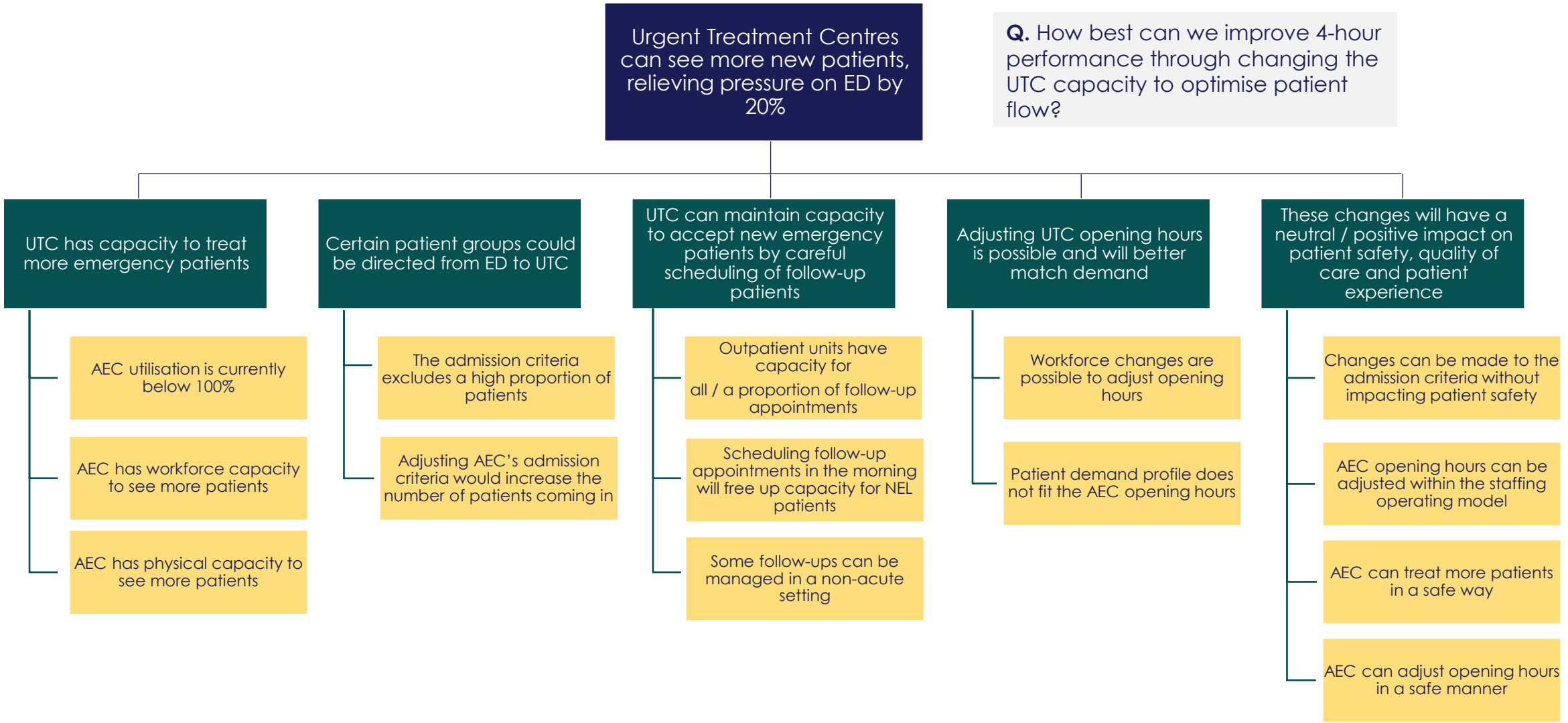
Hypothesis testing in criminal justice

Hypothesis testing and medical diagnosis

Hypothesis Trees can structure and support answers to strategic and policy questions

SAME DAY EMERGENCY CARE CAPACITY

EXAMPLE



Acronyms: **ED** – Emergency Department; **AEC** – Ambulatory Emergency Care; **UTC** – Urgent Treatment Centre; **NEL** – Non-Elective

Hypothesis Trees are used throughout the problem-solving cycle and they become more certain as more analysis is completed

HYPOTHESIS TREES THROUGHOUT THE PROBLEM-SOLVING CYCLE

	Early planning and setup	During problem-solving	Final recommendations
Purpose:	▪ Guide analysis more efficiently than randomly seeking data	▪ Disprove some hypotheses and develop new ideas to test	▪ Synthesise your findings and communicate to stakeholders
Usage:	▪ Structure your project workstreams, by understanding what an answer might look like ▪ Make sure the project analyses test the supporting arguments	▪ Communicate why previous ideas have been disproved ▪ Scope additional analyses needed to test new ideas	▪ Bring together your findings into a structure recommendation based on robust analysis
Evolution:	▪ Trees do NOT have to be correct at this stage – they are only designed to give you an efficient way to analyse information ▪ Being able to disprove a hypothesis and move on is a success	▪ Your tree is becoming more confirmed at this stage	▪ Your tree is now confirmed and is designed to make your supporting evidence transparent

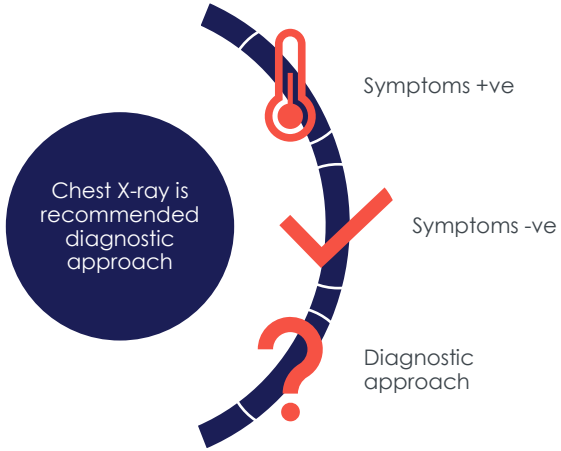
Whilst the concept of a Hypothesis Tree is a pyramid structure for communicating with others, they can be simple dot-dash lists, visual-lists or fully visual diagrams with varying levels of detail

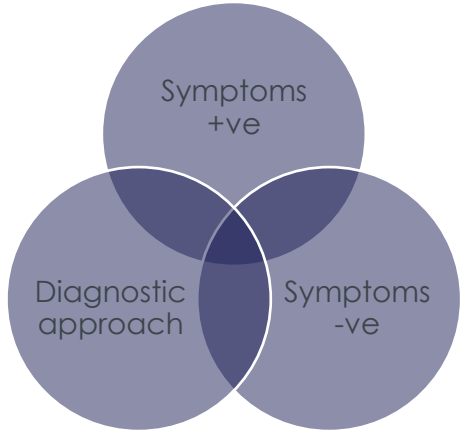
HIDDEN HYPOTHESIS TREES

My hypothesis is that, although the risk that this patient has asthma is small, there is sufficient risk that I should refer him for a chest X-ray to rule this out.

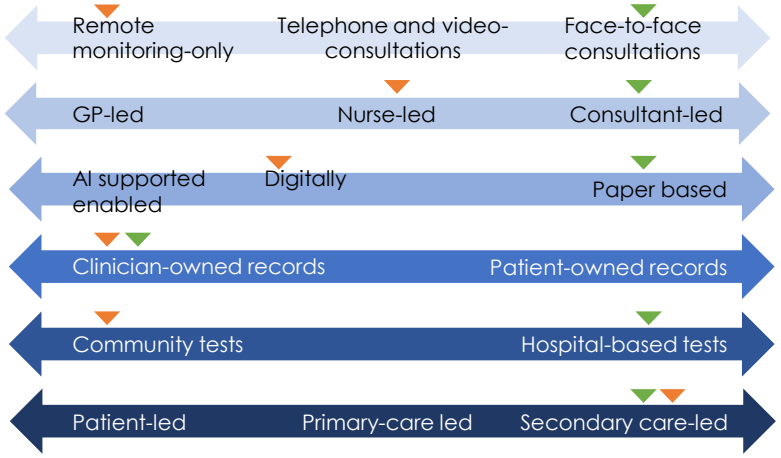
- The patient has some symptoms that are consistent with asthma
  - Patient has had cough for more than 3 weeks
  - Patient says that he has recently lost weight
  - Patient's age (50) elevates the risk
- The patient's symptoms are not sufficiently consistent with asthma for more urgent action to be appropriate
  - Patient has not been coughing up blood
  - Patient has recently had a respiratory infection
- Chest X-ray is the recommended diagnostic approach if there is a small but significant risk of asthma
  - Clinical risk associated with X-ray is very low relative to benefit if asthma is identified

My hypothesis is that, although the risk that this patient has asthma is small, there is sufficient risk that I should refer him for a chest X-ray to rule this out.	The patient has some symptoms that are consistent with asthma	▪ Patient has had cough for more than 3 weeks ▪ Patient says that he has recently lost weight ▪ Patient's age (50) elevates the risk
	The patient's symptoms are not sufficiently consistent with asthma for more urgent action to be appropriate	▪ Patient has not been coughing up blood ▪ Patient has recently had a respiratory infection
	Chest X-ray is the recommended diagnostic approach if there is a small but significant risk of asthma	▪ Clinical risk associated with X-ray is very low relative to benefit if asthma is identified

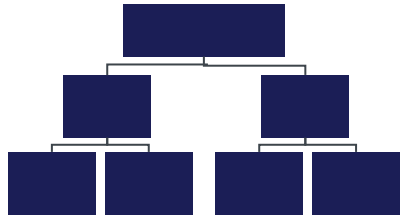




Low-risk patient, service design decisions



Reference: How to use a Hypothesis Tree and the PPT template



SOURCE: THE PSC'S DELIVERING FAST EFFECTIVE PROJECT PROGRAMME

What is this tool?

A Hypothesis Tree helps to organise thoughts on 'the answer' and shows the gaps in your logic. It radically reduces the overall work required to develop insight into recommendations or options, as you focus resources on filling the gaps to support or disprove your working hypothesis.

When to use this tool?

It can be used to clarify thinking, debunk myths and synthesise recommendations. The biggest trap you can fall into is leaving the development of insights and hypotheses until the end of the project. Keep iterating the Tree throughout the project. The answers to your first Issue Tree will drive a first set of hypotheses, which will allow you to refine the Issue Tree, break the question down more meaningfully, and build an improved set of hypotheses based on the evidence.

Tips for using Hypothesis Trees

- It's vital not to be 'wedded to your solution' – iterate whenever the facts don't support the current working hypothesis, and if you're part of a team, speak up when you discover that a foundation 'fact' isn't turning out to be true.
- Use existing frameworks where possible. If one doesn't exist, invest the time in developing your own and testing it with others.
- Aim to capture existing preconceptions / myths so they can be discussed. And give stakeholders plenty of time to react to your emerging hypotheses of options and recommendations.
- Check your workstreams feed into your current working hypothesis – as the hypotheses iterates, some work may become higher or lower priority for resource investment.

Mentoring questions for working with Hypothesis Trees

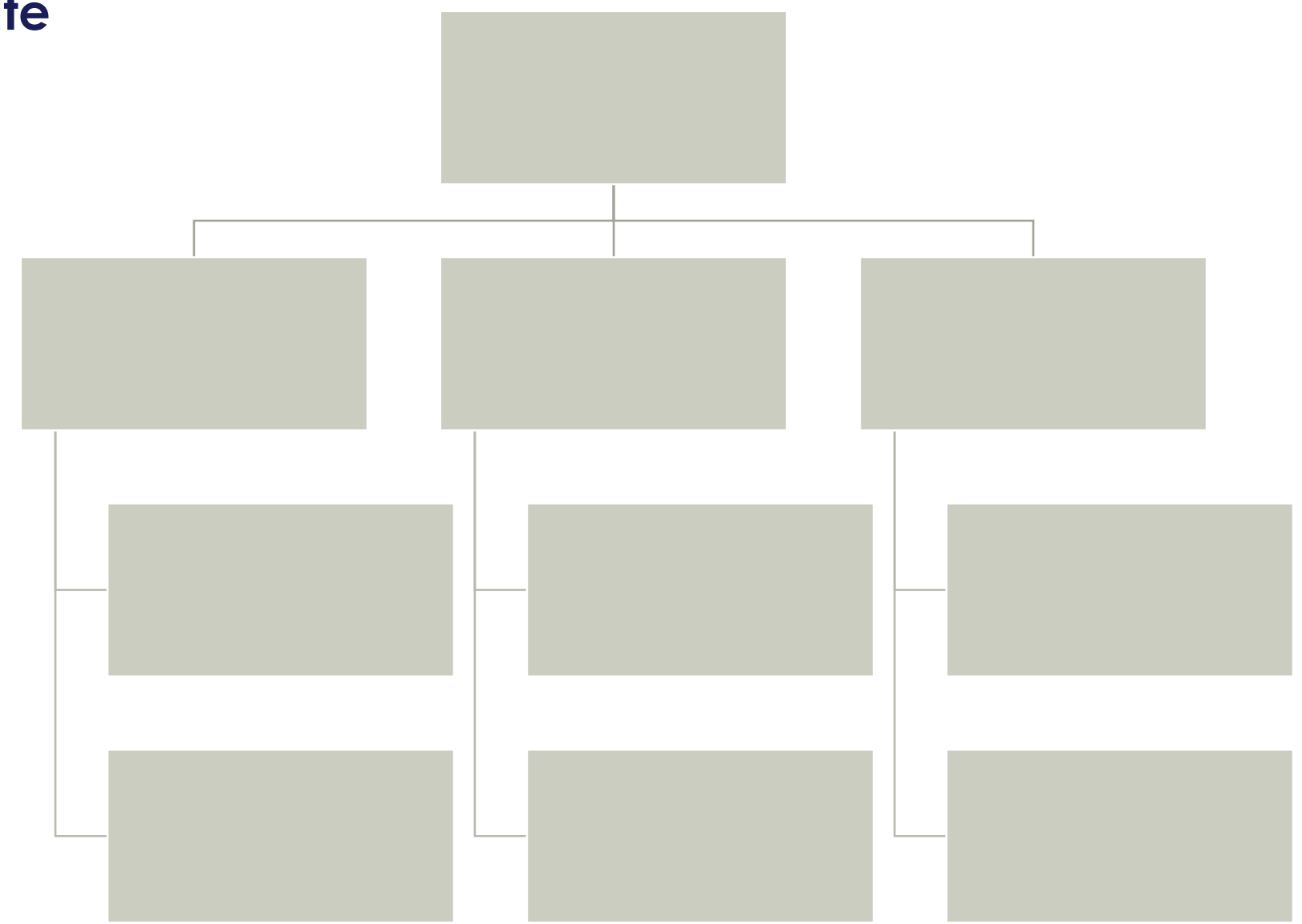
- Start by stating what you believe (based on the available evidence) to be the best answer(s) or options(s) for the basic question to be resolved. Then add the supporting evidence below. Keep asking "why?" and "how?" until the logic and evidence are rock solid.
- Ensure the answers at each level (a horizontal cut) are independent (Mutually Exclusive). But unlike Issue Trees, they do not need to be complete (Collectively Exhaustive). Only the evidence sufficient to disprove or prove the point is necessary.
- Are there alternative / counter / null hypotheses worth exploring? Are the facts sufficient to give confidence in the answer (not just a collection of confirmatory statements)?

PowerPoint Instructions

- This Hypothesis Tree is created using PowerPoint's 'SmartArt' illustration feature, using an 'Organisation chart' layout to create a vertical tree.
- Either copy across the Tree object to your own presentation, or insert the same SmartArt type directly.
- When you click on the Tree, a text box will appear to the left where you can easily edit text and use TAB and ENTER to create new lines (boxes) and indent them to the level you want.
- Also, when you click on the Tree, the two 'SmartArt Tools' tabs will appear in the ribbon so you can format and design the Tree as you wish.
- You can also double 'ungroup' to convert to normal shapes.

Hypothesis Tree template

Click the Smart Art to open the Text Pane in bullet-point view and add / indent elements (you may need to click the arrow control on the left side of the graphic to open the Text Pane).



Hypothesis Tree exercise

ACTIVITY

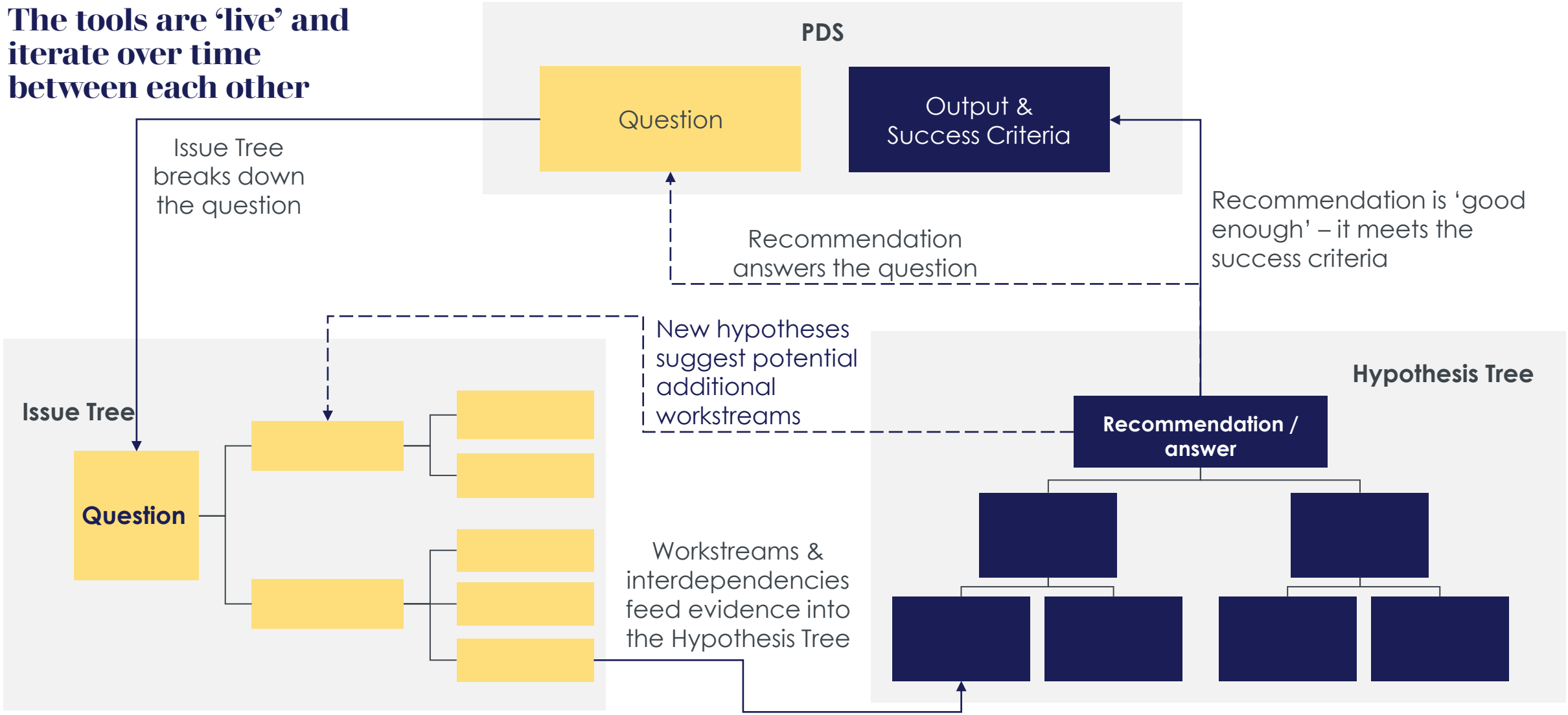
In pairs or small groups, spend 30 minutes preparing a Hypothesis Tree based on your own project.

1. **Use your PDS to guide you.**
2. **Use Post-It notes to draft your Hypothesis Tree.**
   i. You can start top down by proposing a solution and assembling facts to support it.
   ii. Or you work bottom up by grouping facts and asking: "What does this mean for my question?"
   iii. At the early stages in a project, a Hypothesis Tree is simply to guide analysis more efficiently than randomly seeking data. It does not have to be correct. Being able to disprove a hypothesis and move on is a success.

We will wrap up with sharing for 5 minutes as a whole group.

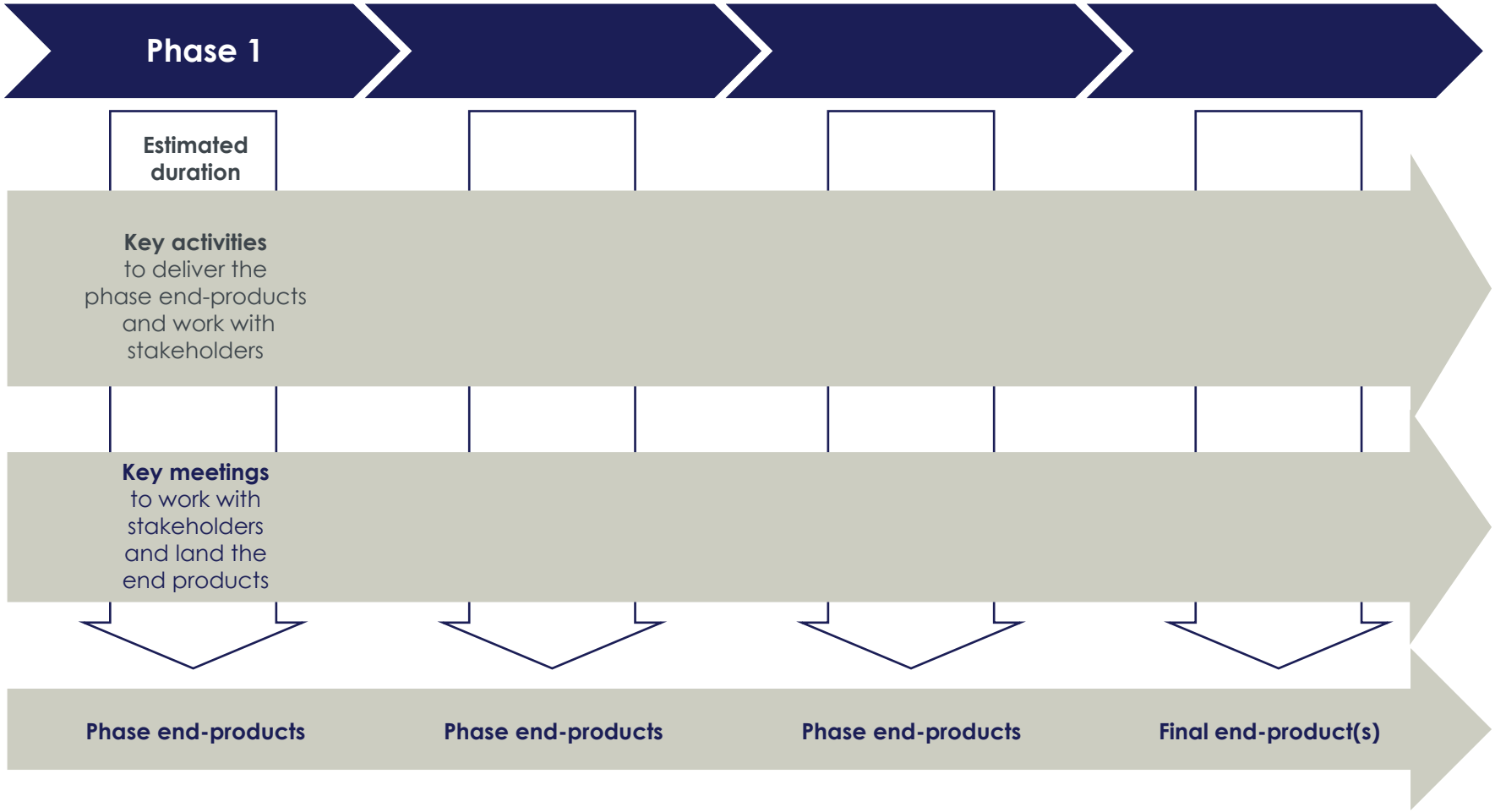
The problem solving cycle

The tools are 'live' and iterate over time between each other



Planning the work: Boat chart workplans & prioritising

In conjunction with a PDS, a 'boat chart' or 'project on a page' is a useful overview for both project leads and stakeholders. It's often sufficient for planning, saving time in maintaining complex project plans.



Find templates and an introduction to Boat Charts at: https://thepsc.co.uk/capability-building/

To write or check them, start with the final end-product, then work backwards through the phase end-products, and then upwards in each phase through the meetings and activities

	Set-up	Diagnosis and option development	Option development and review	Report findings
Estimated Duration	**1 to 2 weeks**	**~1.5 months**	**~1 month**	**2 to 3 weeks**
Key activities	▪ Understand context ▪ Establish team working relationships ▪ Identify key stakeholders ▪ Put in data requests ▪ Set up interviews / fieldwork	▪ Conduct interviews with key stakeholder groups (see separate slide for initial list) ▪ Gather data ▪ Determine analytical priorities and conduct analyses	▪ Syndicate and review findings ▪ Conduct follow-up interviews as appropriate	▪ Share recommendations ▪ Work with steering group to: – influence key decision-makers – develop outline action plan for implementation
Key meetings	▪ First steering group meeting ▪ Kick-off working team meeting	▪ Workshop to test and improve initial findings (October 21st) ▪ Steering group (first week of November	▪ Workshop to develop options (early November) ▪ Steering groups (first week December)	▪ Final steering group (last week of December) ▪ Workshop to syndicate and improve options and recommendations (second week of December)
End-products	▪ List of interviewees / fieldwork ▪ Interview guides ▪ Data request	▪ Initial findings report diagnosing strategic challenges	▪ Emerging recommendations report, including: – interim list of options, with associated financial impact – SWOT analysis / risk assessment of delivering each option	▪ Final report

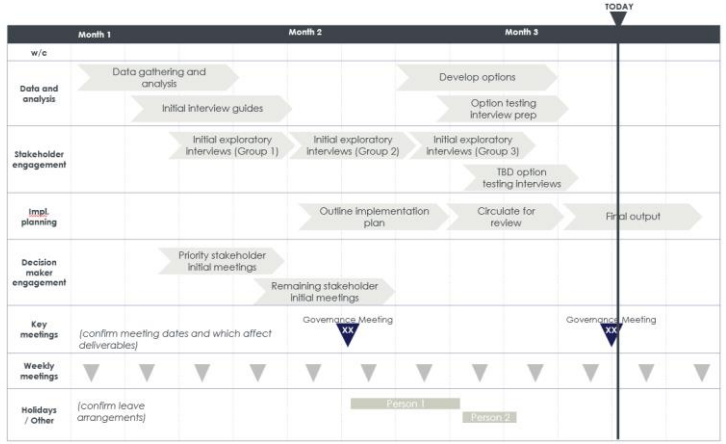
PLANNING / TRACKING EXAMPLES: GANTT VARIATIONS, DELIVERABLES GRID / SPRINT TRACKER & TIMELINE

Alongside your boat chart you can use more specific planning tools, like a Gantt / timeline or deliverables tracker – aim to use the minimum / simplest format necessary for planning and monitoring your project work

Timeline

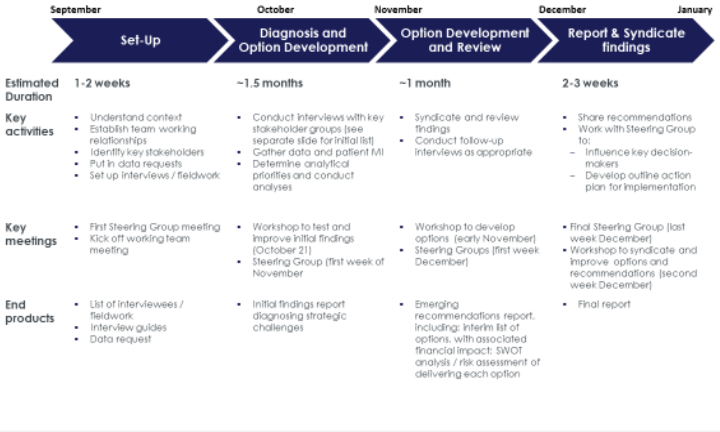
The PSC

Labelled Gantt work-plan



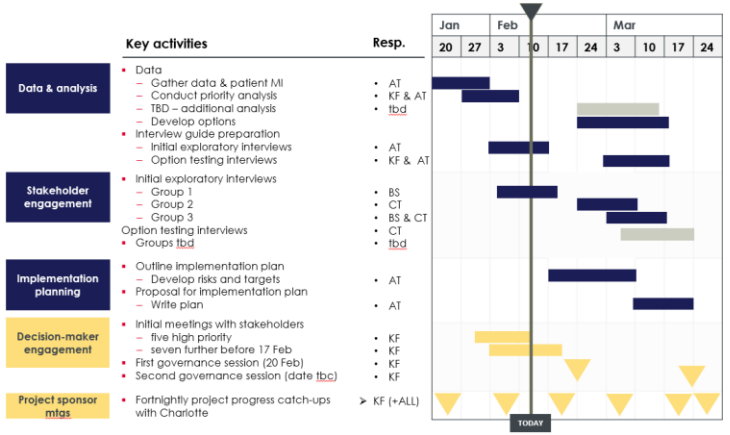
The PSC

Boat chart workplan



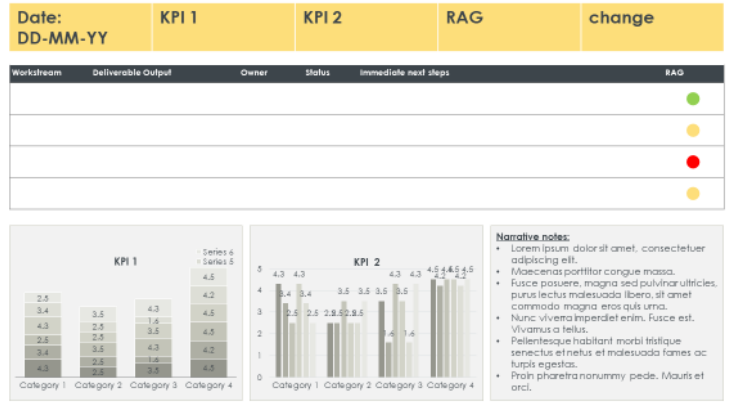
The PSC

Simple Gantt workplan



The PSC

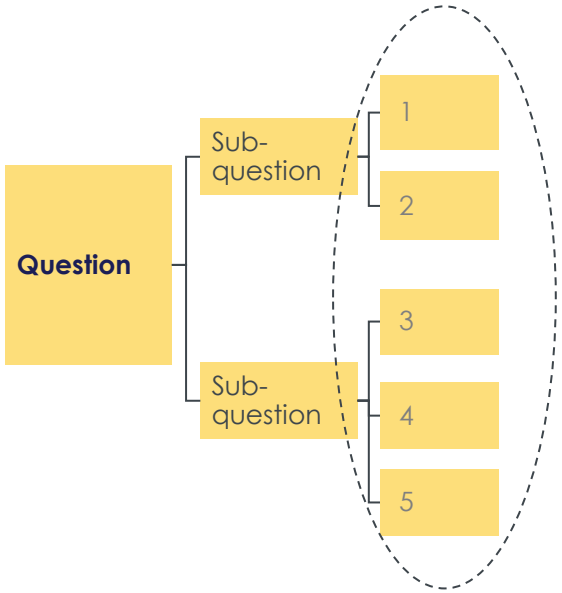
Data and deliverables Tracker



The PSC

Your project plan needs to reflect the work you identified in your Issue Tree – but you'll need to prioritise as it's unlikely to be valuable to exhaustively do everything

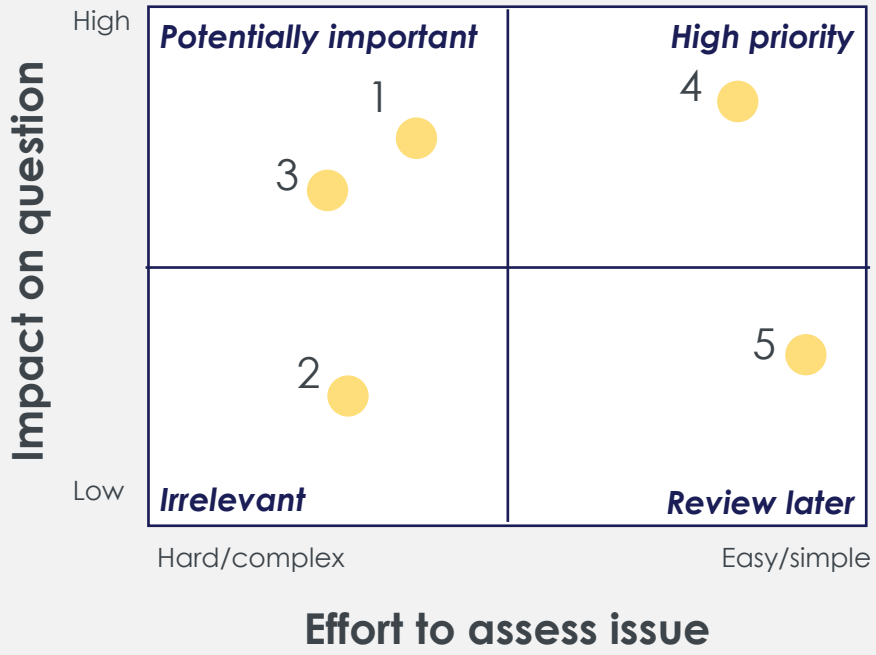
WORKSTREAM PRIORITISATION



Prioritise each workstream against appropriate factors

- Effort to assess the issue
- Impact on the question
- Level of control

Prioritisation Matrix



- Use simple tests – don't do the project at this stage!
- Focus time on the simplest work that's likely to get to a 'good enough' answer that meets your success criteria
- Prioritise ruthlessly – be clear on what you're NOT doing, whether it's entire potential workstreams, or limiting the scope / activity within a workstream

Reference: How to use Boat Chart Workplans and the PPT template

What is this tool?
A 'boat chart'* is a very simple style of work plan showing end-products, key activities and meetings, and the overall timing of each project phase. A prioritisation matrix can help with deciding which work to include.

When to use this tool?
It is useful for projects involving complex problems without clear solutions, where the detailed path of the project is not evident at the outset (e.g. decision-making, option generation, reviews).

Tips for using boat chart workplans and prioritising workstreams

- Keep it simple: the purpose is to help the team achieve the project objectives on time and in full. (Running the work plan is not an objective in itself.)
- Remember to use your Issue Tree and prioritisation matrix to identify and select the workstreams which go into your work plan.
- The work plan often ends up being used primarily as a tool for communicating with stakeholders, so make sure it is easily understandable (avoid jargon and acronyms) and fits on a single page.

Mentoring questions for working with boat charts:

- Review the series of end-products from the final one (bottom right) working to the left – is this a sensible sequence of deliverables?
- Review each column – are these the necessary stakeholder meetings to land the end products? And the necessary activities (from Issue Tree and Hypothesis Tree) to develop them?
- Review timings for each phase – are they sensible given resourcing?
- Review the Issue Tree and prioritisation matrix and stakeholder planning – are you spending time on the work most likely to allow you to find a good enough solution (that meets your success criteria), within the time and resources agreed, and that stakeholders agree with?

PowerPoint Instructions

- This 'boat chart' was created by combining a table (to make the text align nicely) with PPT's 'SmartArt' illustration feature (look it up on the web to find out more).
- This template uses the 'basic chevron process' SmartArt layout. You can either copy across the table and SmartArt object to your own presentation, or insert a table and SmartArt object directly.
- When you click on the chevrons (the 'boats'), a text box will appear to the left where you can easily edit text and use ENTER to create new chevrons.
- Also, when you click on the chevrons, the two 'SmartArt tools' tabs will appear in the ribbon so you can format and design it as you wish.
- You can resize the whole object using the outer box.
- You can also double 'ungroup' to convert.
- The table can be sized and adapted – the 'distribute columns' option in the table layout tab is useful for aligning columns with the chevrons.

*They are called 'boat charts' because the chevrons look like a line of boats following each other.
Source: The PSC's Delivering Fast Effective Project programme

Boat Chart template

- Phases are Smart Art – click the left-side arrow to add / remove phases
- The main content below the arrows is a table – add / remove columns
- The 'months' are text boxes – move as necessary

	<Phase 1>	<Phase 2>	<Phase 3>	<Phase 4>
Estimated Duration	**X weeks**	**X weeks**	**X weeks**	**X weeks**
Key activities				
Key meetings				
End-products				

Boat Chart exercise

ACTIVITY

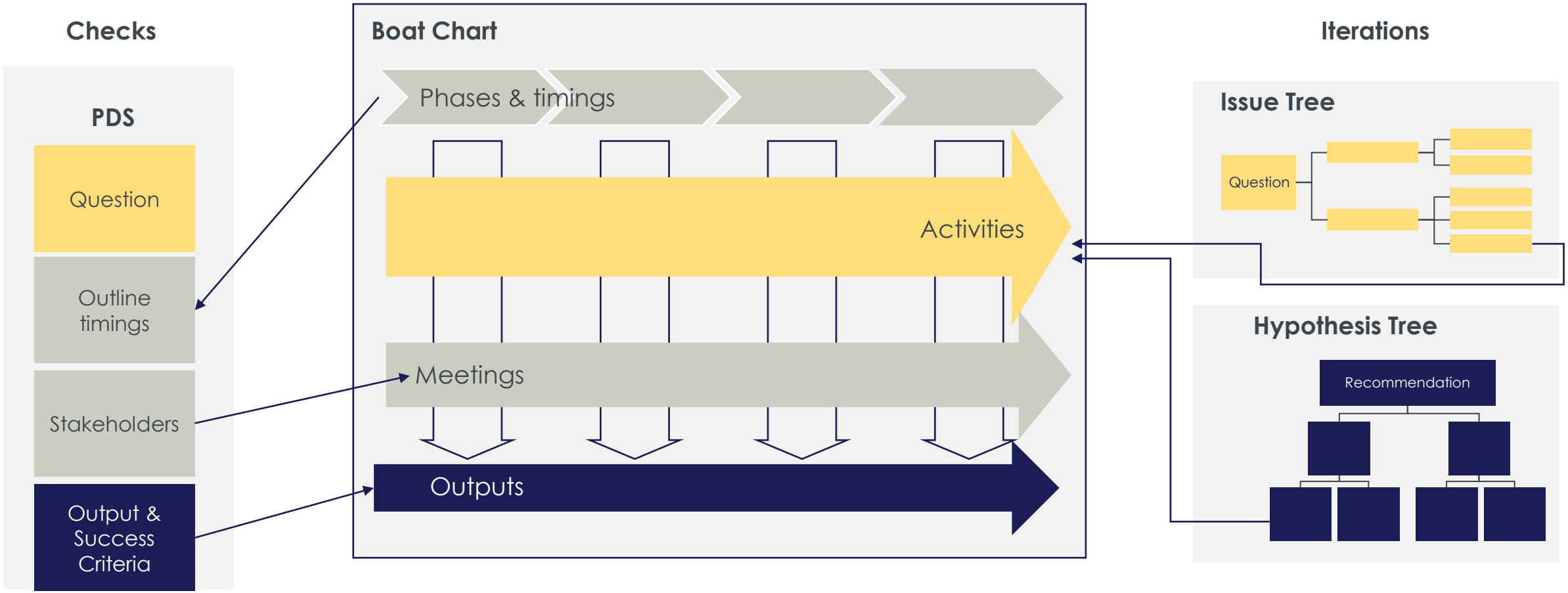
In pairs or small groups, spend 15 minutes preparing a Boat Chart workplan for your project.

- **Remember to work (or at least check) from right to left and bottom to top.**

We will wrap up with sharing for 5 minutes as a whole group.

Templates available here: https://thepsc.co.uk/capability-building/module/psat-workplan-boat-chart/

To plan to solve your problem, check your plan against your PDS, and iterate it with your tree(s) as you evolve your hypothesis – so you focus on the most useful activities



THE PLANNING CYCLE

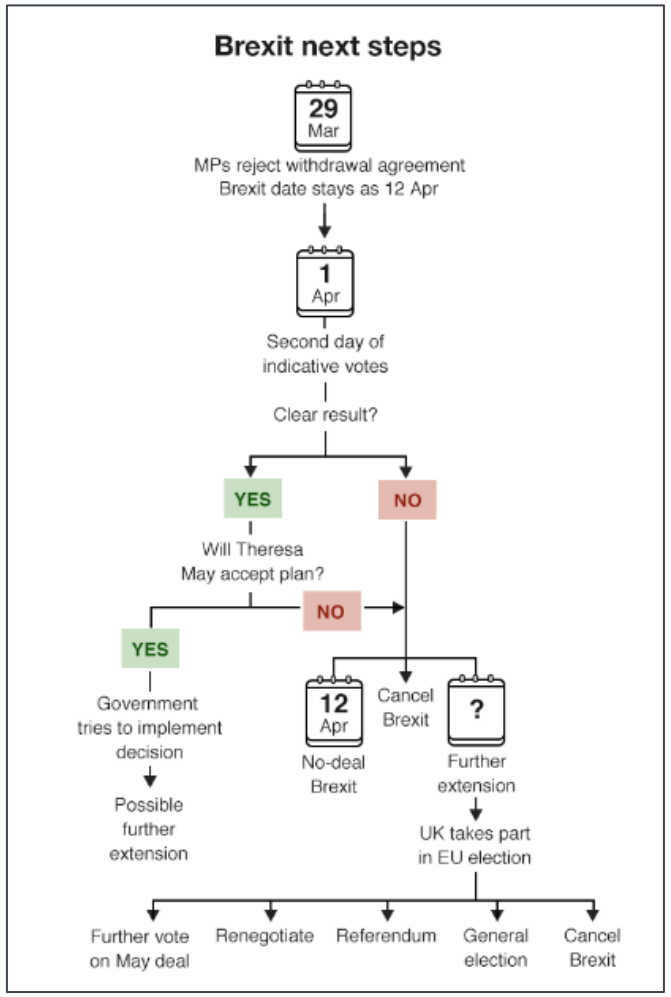
Options Appraisal

Hypotheses are rarely static – they will iterate over time, and it's often helpful to have multiple 'active' hypotheses to explore options or scenarios, or to test a counter-hypothesis

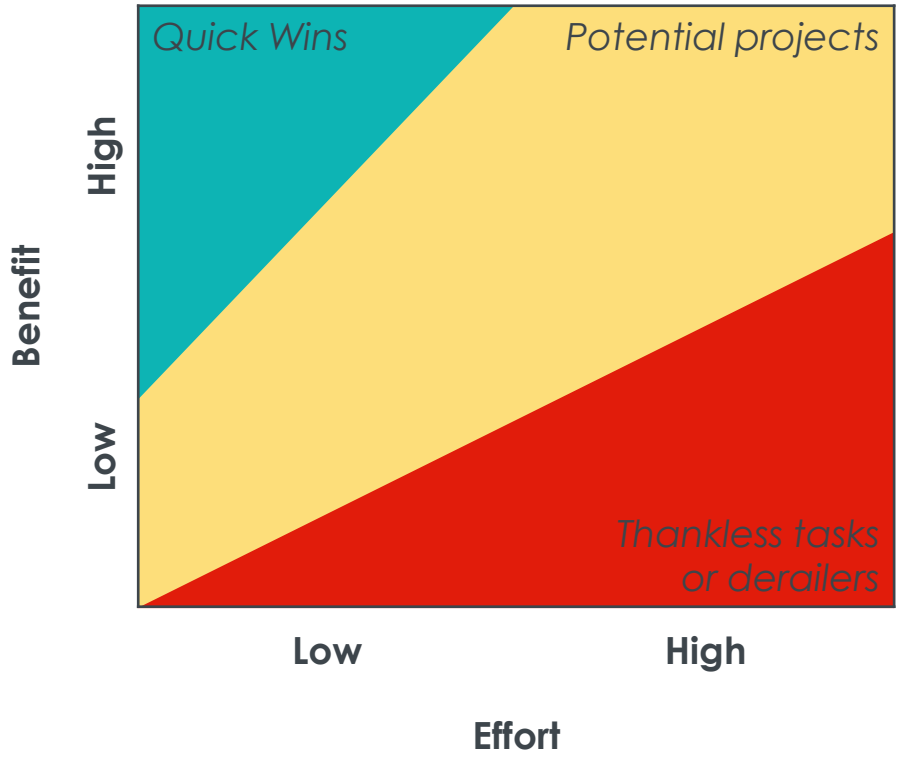
Updated iteration	Has something changed (factually or in your thinking) so it would be valuable to revisit your **initial** hypothesis?
Multiple options	What could you learn from exploring **multiple possible answers**?
Counter-factual	What could you learn from trying to support the **opposite** hypothesis?
Multiple scenarios	What could you learn about how the answer might change in **different scenarios**?

When you need to compare multiple options, use the simplest tool that is sufficient – decision trees or two-factor matrices where possible

Decision tree*



2x2 matrix: Benefit-effort



*Source: bbc.co.uk, Mar 2019

To assess options against more than two factors, a 'Pugh' matrix can be helpful

1. Agree **options** to assess
2. Agree assessment **criteria** (3-6 is manageable)
3. Agree criteria **weightings** for relative importance
4. Agree **scoring** (e.g. -2 to +2, or 0-5)
5. Compare to 'business as usual'

Criteria might cover:

- **Suitability** – does it answer the question and meet the success criteria, such as cost / benefit or broader strategic alignment?
- **Feasibility** – what are the barriers to implementation?
- **Acceptability** – will stakeholders support it?

Pugh options matrix

		Potential options		
Criteria	**Weighting**	**Option A**	**Option B**	**Option C**
Timing	20%			
Longevity	20%			
Disruption	10%			
Cost	20%			
Impact	30%			
Score	(100%)			

Example: Where should Oldtown University allocate the funding it received from a recent donation

PUGH MATRICES: WORKED EXAMPLE

It is worth repeating: this ranking depends on the weightings you select – if you change the weightings you will get a different result

This table records your weighting and scores, but does not contain the calculation for the overall benefit – you will need to do that elsewhere.

Criteria / consideration	Weighting	Increased tutor salary	Increased contact hours	New student bar	Digital learning system	Marketing Campaign
Tutor satisfaction	25%	3	2	-2	0	0
Student satisfaction	20%	2	3	3	2	-1
Increase in students	30%	0	2	3	1	3
Environmental impact	15%	0	0	-2	-1	-1
Speed of change	10%	3	3	0	1	2
Overall Benefit						

Options Analysis Exercise

- In the same pairs or small groups, spend 15 minutes **considering your project's options:**
  - Decide what options you will compare
  - Choose a tool (decision tree, 2x2 or Pugh Matrix)
  - Draft a comparison (use dummy information if necessary)

- We will wrap up with sharing for 5 minutes as a whole group

Synthesising insight (3)

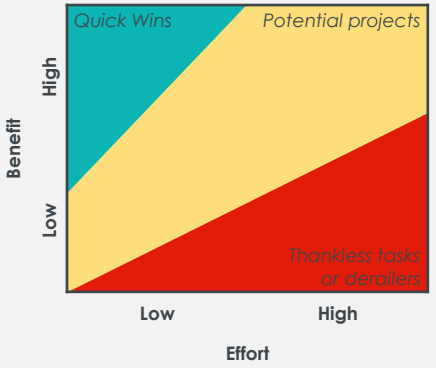
Where does SCQA relate to the tools we've just learnt – Hypothesis Trees and Options analysis?

SCQA TOOL

Situation	• How it used to be…. (PDS)
Complication	• What's changed is…. (PDS)
Question	• Question to be resolved (PDS)
Outcome	• Desired outcome (PDS)
Answer	• Current working answer

Hypothesis Tree

Options Appraisal

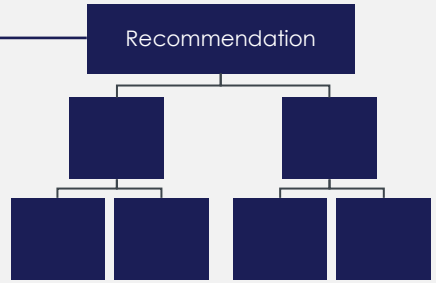


Where does SCQA relate to the tools we've just learnt – Hypothesis Trees and Options analysis?

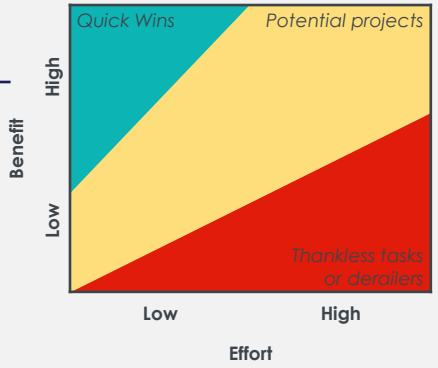
SCQA TOOL

Situation	• How it used to be…. (PDS)
Complication	• What's changed is…. (PDS)
Question	• Question to be resolved (PDS)
Outcome	• Desired outcome (PDS)
Answer	• Current working answer or set of options (Hypothesis Tree & Options Appraisal)

Hypothesis Tree



Options Appraisal



Now we're going to split into breakout groups to practise your SQCA-story, imagining that you've unexpectedly met a Board member in a queue, and they've asked what you're working on

- In your breakout groups:
- Spend 5 minutes individually preparing your '5 sentence story' – you could add 'what we're doing now' as a sixth if you wish (plan)
- In turns, role-play answering the question 'what are you working on?' from a senior leader
  - 1-2 mins to answer
  - 3-4 mins to debrief with your team
  - Repeat until everyone has had a turn – 20 mins for four people in a breakout
- In your breakout, reflect on the exercise
- Return to the main session ready to share a couple of reflections with everyone

Situation	•How it used to be…. (PDS)
Complication	•What's changed is…. (PDS)
Question	•Question to be resolved (PDS)
Outcome	•Desired outcome (PDS)
Answer	•Current working answer or set of options (Hypothesis Tree & Options Appraisal)
Plan	•What we're doing now / going to do

The Strategic Thinking Programme

Pre-work	Challenging Environments	Understanding the Challenge	Developing Insight	Stakeholder Engagement
• Draft Problem Definition Sheet	• Introduction • Challenging environments • Our environment • Synthesising Insight (1)	• Defining the Problem (Problem Definition Sheet) • Structuring the Problem (Issue Trees) • Synthesising Insight (2)	• Developing insight (Hypothesis Trees) • Planning the work (boat chart workplans) • Options Appraisal • Synthesising Insight (3)	• Stakeholder Engagement • Influencing Styles • Synthesising Insight (4) – Communicating with stakeholders • Review & Reflect

Stakeholder engagement – assessment & planning

To deliver impact with your work, you need to not only solve the problem, but do it within the planned timeframe and resources, and with a solution which stakeholders agree with and will commit to action

Impact

Problem

People

Plan

Why is influencing important?

Who might you need to influence?

What are the challenges?

Who do you need to engage? How deeply?

1. Establish full list

- Decision makers?
- Influencers?
- Reviewers?
- Data owners?
- Project team?
- Operational teams?
- Other departments or organisations?
- The public?

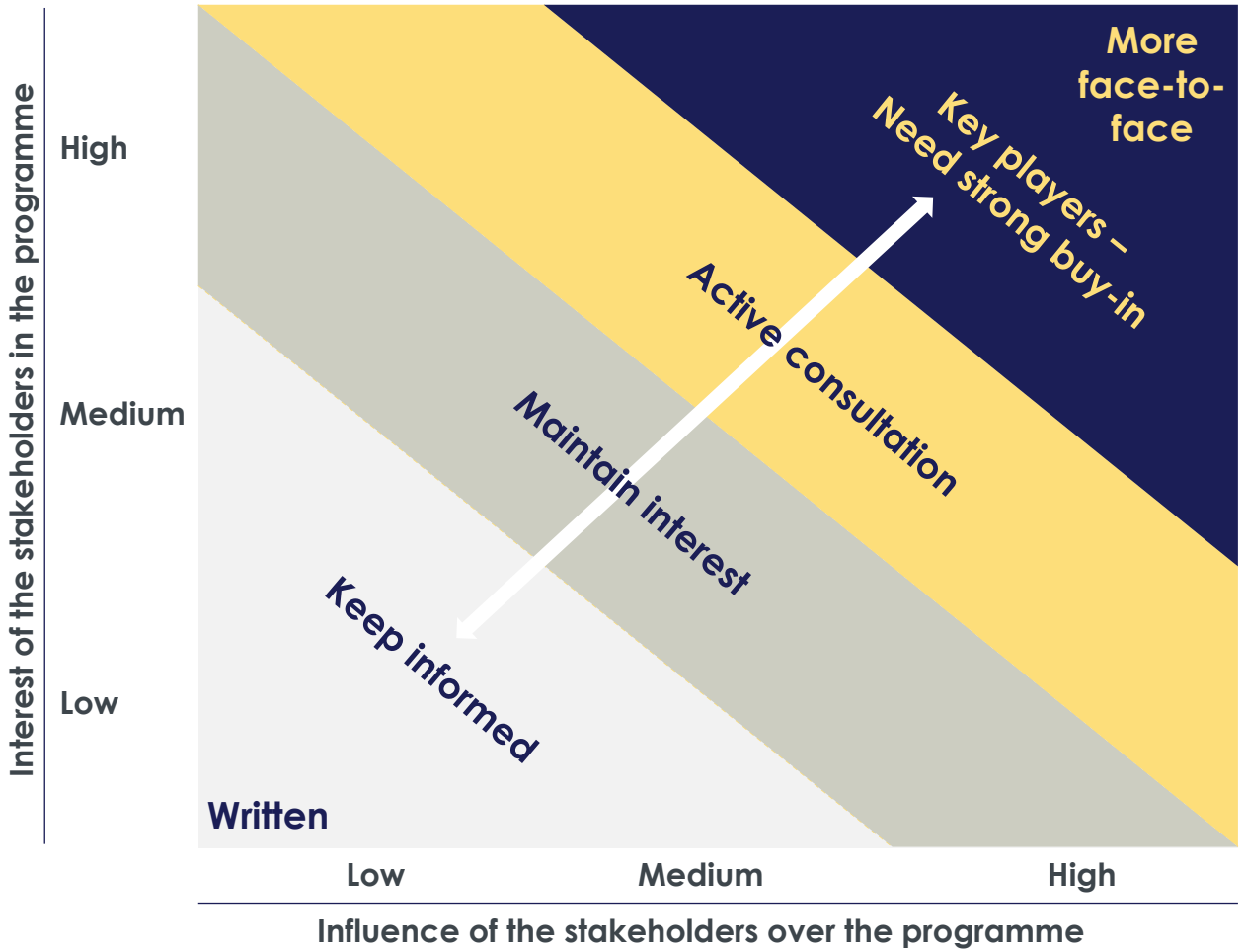
2. Group & prioritise

- Influence/Interest matrix
- *(review regularly as this can change throughout the project)*

3. Plan engagement by group

- What do you need from them?
- What's the current gap between where they are and where you need them to be?
- How to approach them?
  - 1:1 meetings
  - Working group
  - Active Consultation
  - Maintain Interest
  - Keep Informed

An influence/interest matrix can be helpful in prioritising individuals and groups of stakeholders, and deciding on engagement method



This is another 'two factor' matrix, like those used for work prioritisation and options appraisal, with factors specific to stakeholder engagement

Then use your assessment to make an engagement plan for each group

Group	Stakeholder category	Key People	Proposed Engagement
Project board	Key Players	▪ Director and Deputy Director of Project Board ▪ Managers of project strands	▪ Regular Show and Tells ▪ Weekly meetings between team and Project Board
EU Commission and EU Experts	Key Players	▪ Commissioner for Energy ▪ Head of International Cooperation	▪ Participatory workshops ▪ 1-to-1 meetings ▪ Invite to Show and Tells
Key UK Modelling Experts	Key Players	▪ Economists within government departments	▪ Stakeholder led workshops ▪ Sharing of information and resources ▪ Invite to Show and Tells
Other Key Modelling Experts	Active Consultation	▪ Academics ▪ Researchers within the European Commission for Energy	▪ 1-to-1 meetings ▪ Stakeholder led workshops
Data Holders	Active Consultation	▪ IEA	▪ Designated team member to communicate with data holders
Other Experts	Maintain Interest	▪ IPCC ▪ Dutch EPA	▪ Panel discussions to hear a wide range of opinions
Political (Domestic)	Maintain Interest	▪ No. 10 ▪ Ministers ▪ DfID & DEFRA	▪ Publications of early findings
Political (International)	Keep Informed	▪ OECD ▪ IMF ▪ WRI	▪ Identify a key contact to circulate publications through

In breakout groups, 5 mins to work on your stakeholder assessment and planning

STAKEHOLDER ASSESSMENT EXERCISE

1. **Do you have a sufficiently full list?**
   - Is the **PDS list** sufficient? Do you need a longer one for the full stakeholder list?
   - How will you access the **data** you need? Are there **experts** who you need to check it with?
   - Do you have a guiding coalition of approvers, influencers and decision makers to help you **successfully land your recommendations**? If not, who should be in this coalition? Are they priorities for engagement already? (if not, they should be).
   - Does the **project governance** include your most important stakeholders?

2. **Are you clear on grouping & priorities?**

3. **What's your engagement & communication plan?**

Group	Stakeholder category	Key People	Proposed Engagement
Project board	Key Players	▪ Director and Deputy Director of Project Board ▪ Managers of project strands	▪ Regular Show and Tells ▪ Weekly meetings between team and Project Board
EU Commission and EU Experts	Key Players	▪ Commissioner for Energy ▪ Head of International Cooperation	▪ Participatory workshops ▪ 1-to-1 meetings ▪ Invite to Show and Tells
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Influencing styles

How have you engaged others in problems and recommendations?

TOOL: 10 POSITIVE INFLUENCING STYLES

Everyone has preferences for the styles they like to use and the styles which affect them, in their cultural context

Basis	Approach	Example
Facts	**1. Authority**	▪ (Name of senior leader) has asked us to do this piece of work.
	2. Logic	▪ The evidence shows that we can save the £30 million over 5 years if we implement this recommendation.
	3. Statements	▪ Please send us the 2018/19 travel time data.
	4. Examples	▪ Here's an option appraisal from another region – please could you see what assumptions they made when doing your option appraisal?
Discussions	**5. Consultation**	▪ What other factors should we be considering for this option?
	6. Exchanges	▪ If you could send me the historic financial records, I can send the forecasts back to you as soon as we've done them.
Relationships	**7. History**	▪ It's the same problem as last year – can you help me out again?
	8. Sociability	▪ Let's work out what should be in the summary over lunch.
	9. Friendship	▪ I would really appreciate your help in making this work.
	10. Values	▪ This would really make a difference to patient experience.

Coaching is a related skill within the context of trusted adviser relationships. It focuses on the thinking process, not the content.
Building guiding coalitions is an influencing technique in its own right. It builds on the other approaches once individuals are engaged.

Influencing stakeholders exercise

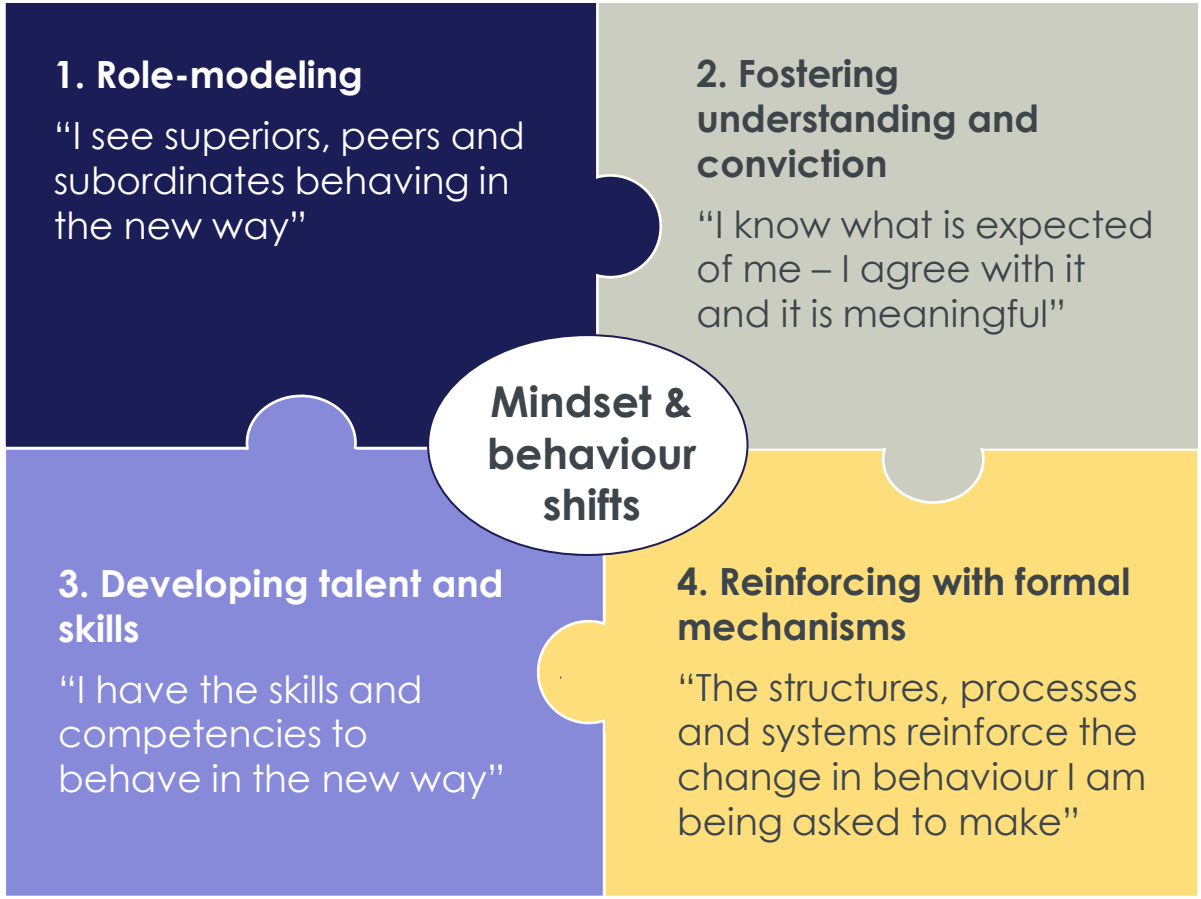
- In your breakout groups, think of times you have used each of the approaches, and make a list of examples (these can be personal as well as work).
- Discuss which styles you personally prefer to use, and which styles are most common in your organisation (which may be different), and be prepared to summarise to the other groups.
- Think about one or two key stakeholders for your project and how you need to influence them in the coming weeks – which influencing approaches would you try?

- We will wrap up with sharing for 5 minutes as a whole group.

The Influence Model gives four components that must be in place to shift mindsets and behaviours

THE INFLUENCE MODEL: COMPONENTS OF EFFECTIVE CHANGE

"I will change my own behaviour if…"



Lasting change is unlikely unless all four pieces are in place

Source: John Drew et al, Journey to Lean: Making Operational Change Stick, p201, Fig 10.3.

Each component can be broken down into a number of more actionable categories

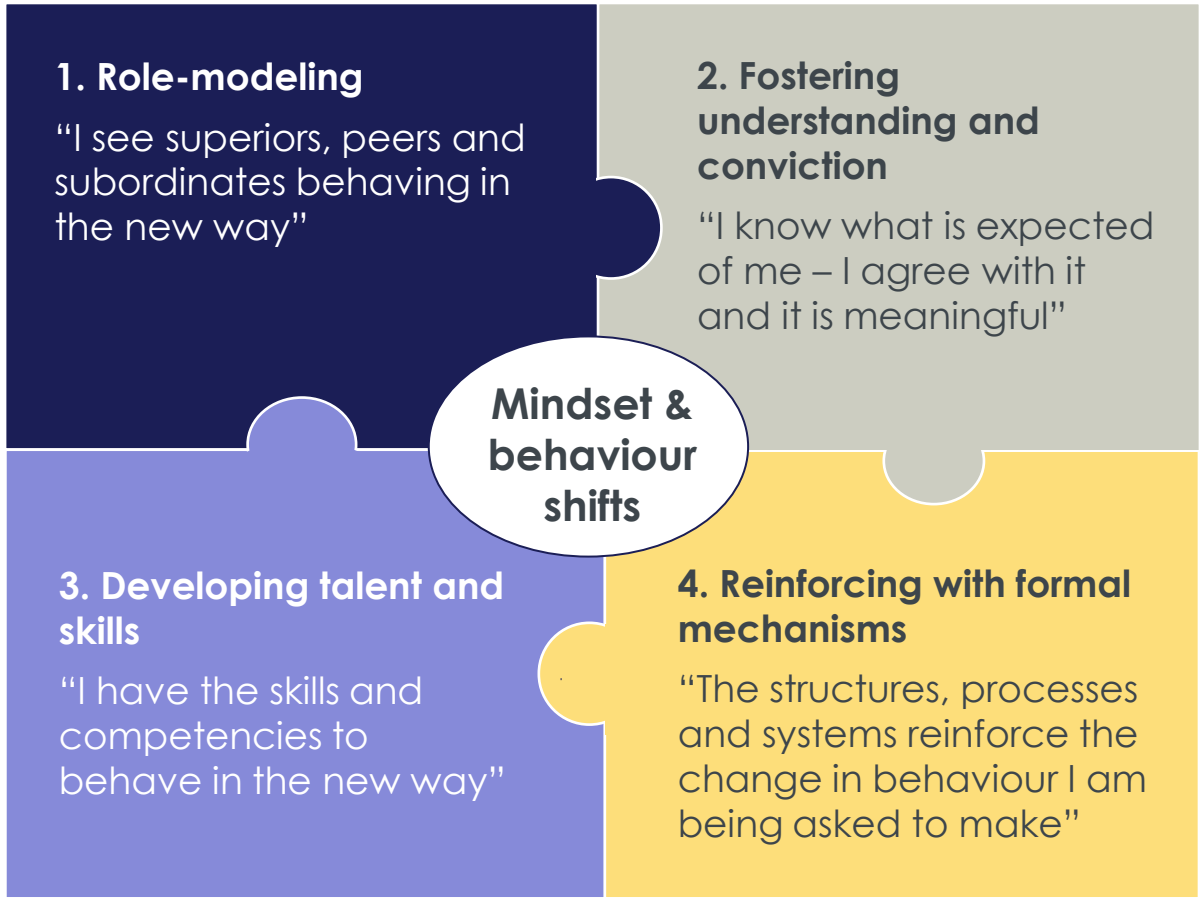
THE INFLUENCE MODEL: ACTIONS FOR CHANGING BEHAVIOUR

"I will change my own behaviour if…"

Component actions

- Leadership embodying the change
- Getting opinion-shapers on board
- Peer interactions

- Talent management
  - Hiring
  - Replacing
  - Retaining
- Learning
  - On-the-job development
  - Training
  - Action learning



Component actions

Story development (includes all the key elements – e.g., values, strategy, case for change)

Story delivery (across relevant levels – e.g., organisational, employee, functional)

Organisation structure

Targets and metrics

Management processes

Business processes

Rewards, recognition and consequences

Information systems

Source: John Drew et al, Journey to Lean: Making Operational Change Stick, p201, Fig 10.3.

Synthesising insight (4)

Throughout your project you'll need to communicate with different individuals and groups, for different purposes, in different ways – set your agenda based on your communications objectives and mode

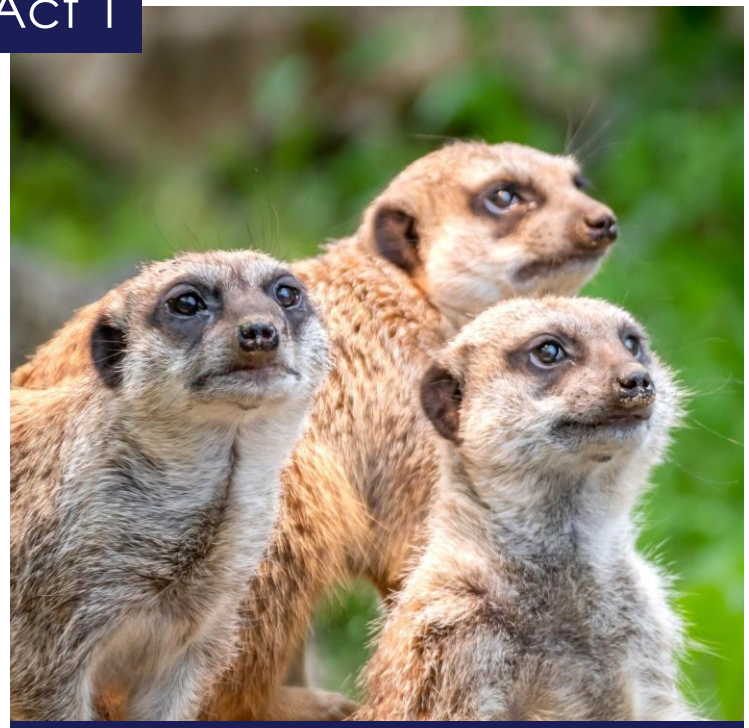
Why?

Do you need a document? Would a single discussion page support the conversation best?

How?

Once your purpose is clear, plan a storyline for your comms – documents, presentations and meetings can all benefit from a storyline such as setup, 'action' and conclusion.

Act 1



The compelling setup

Act 2

The engaging action

Act 3

The thrilling conclusion

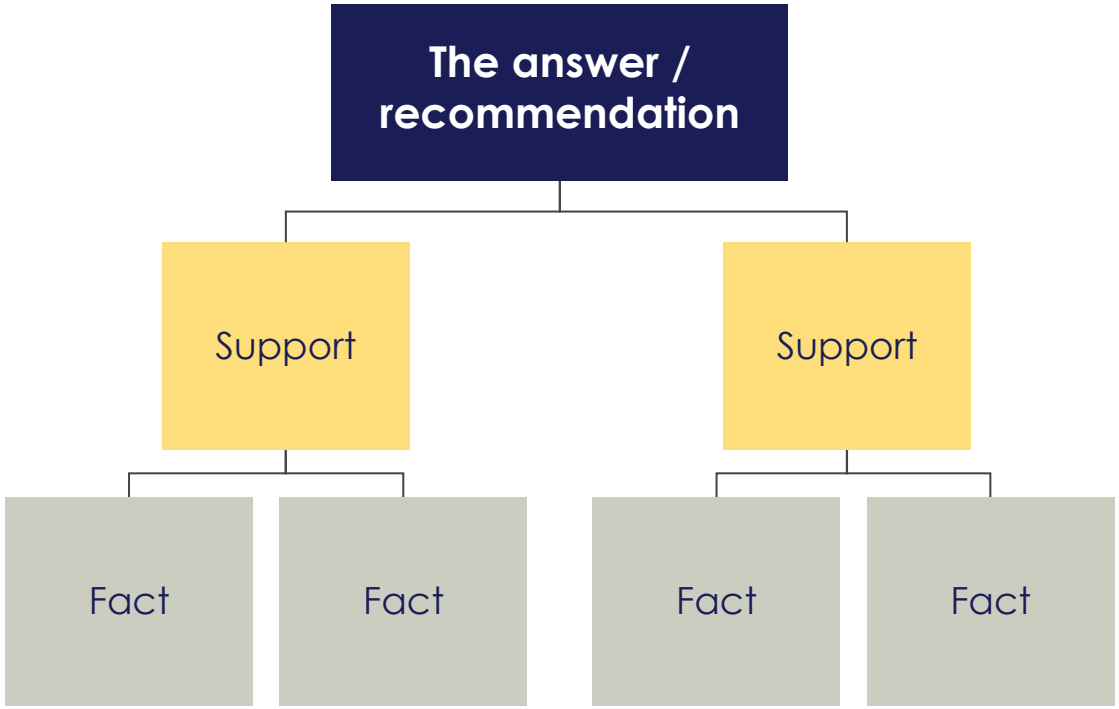
Source: adapted from 'Beyond Bullet Points' by Cliff Atkinson

Act 1
The compelling setup

Situation	• ‘the hook’
Complication	• ‘the relevance’
Question	• ‘the challenge’
Outcome	• ‘the desire’
Answer	• ‘the map’

Source: adapted from ‘Beyond Bullet Points’ by Cliff Atkinson

Act 2
The engaging action



Source: adapted from 'Beyond Bullet Points' by Cliff Atkinson

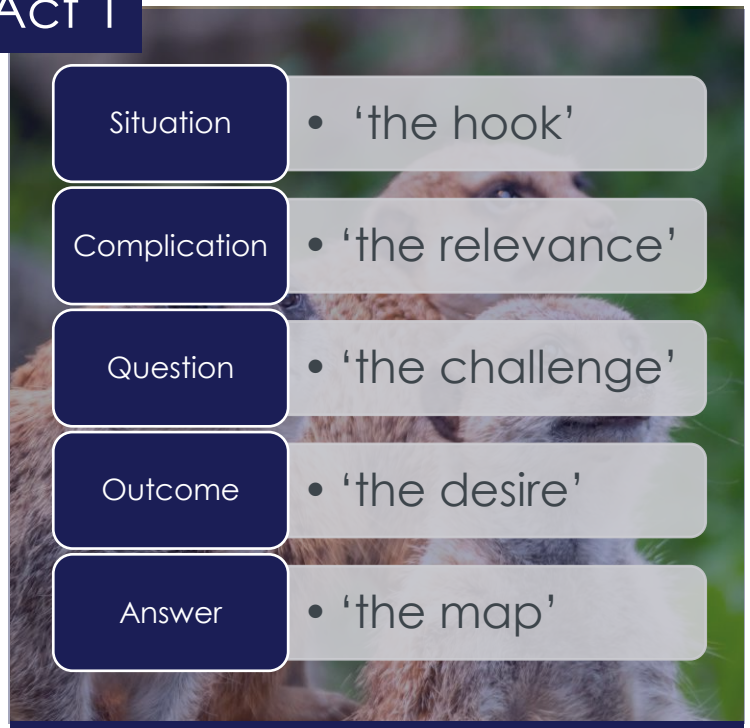
Act 3
The thrilling conclusion

- Question
- Desired Outcome
- Recommendations
- Decision / next steps

Source: adapted from 'Beyond Bullet Points' by Cliff Atkinson

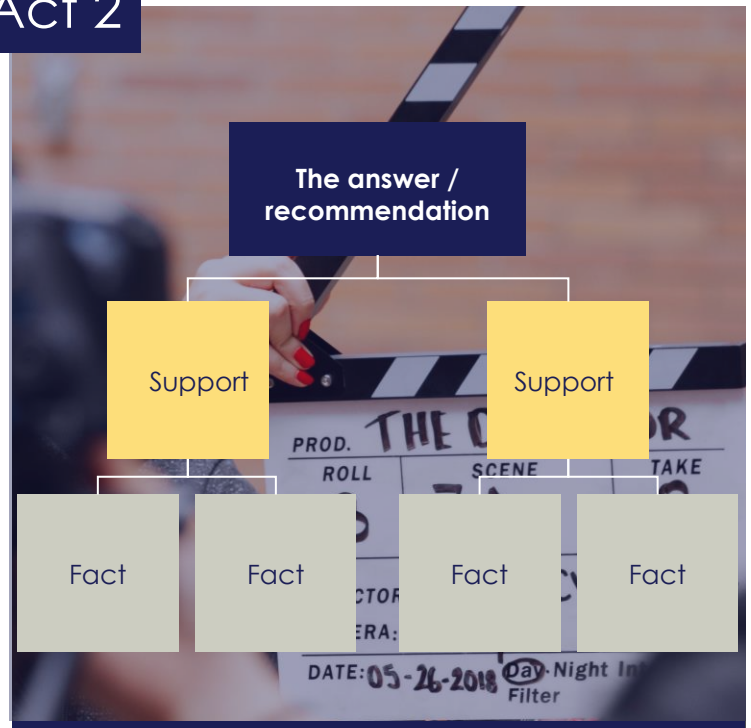
Storyline:
setup (SCQA) + action (hypothesis & evidence) + conclusion (recommendations)

Act 1



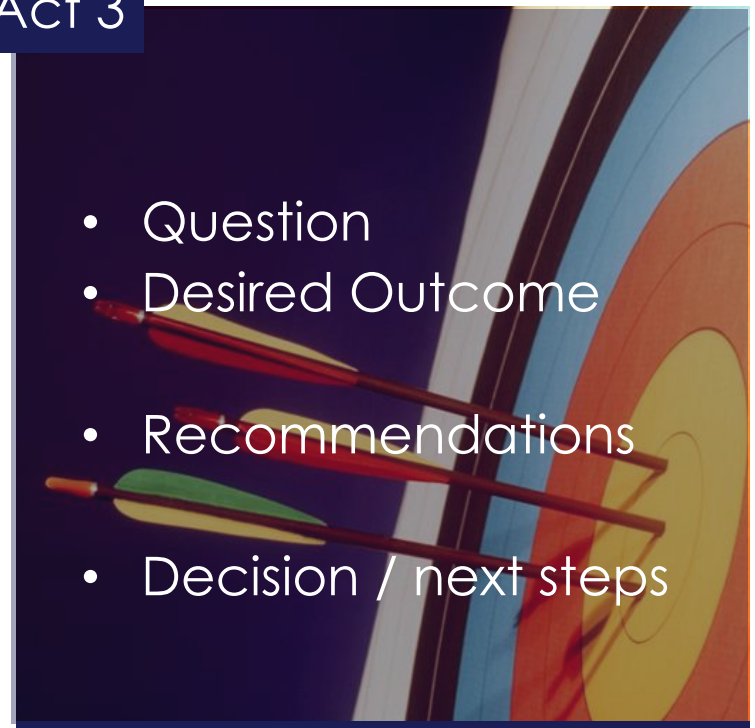
The compelling setup

Act 2



The engaging action

Act 3



The thrilling conclusion

Source: adapted from ‘Beyond Bullet Points’ by Cliff Atkinson

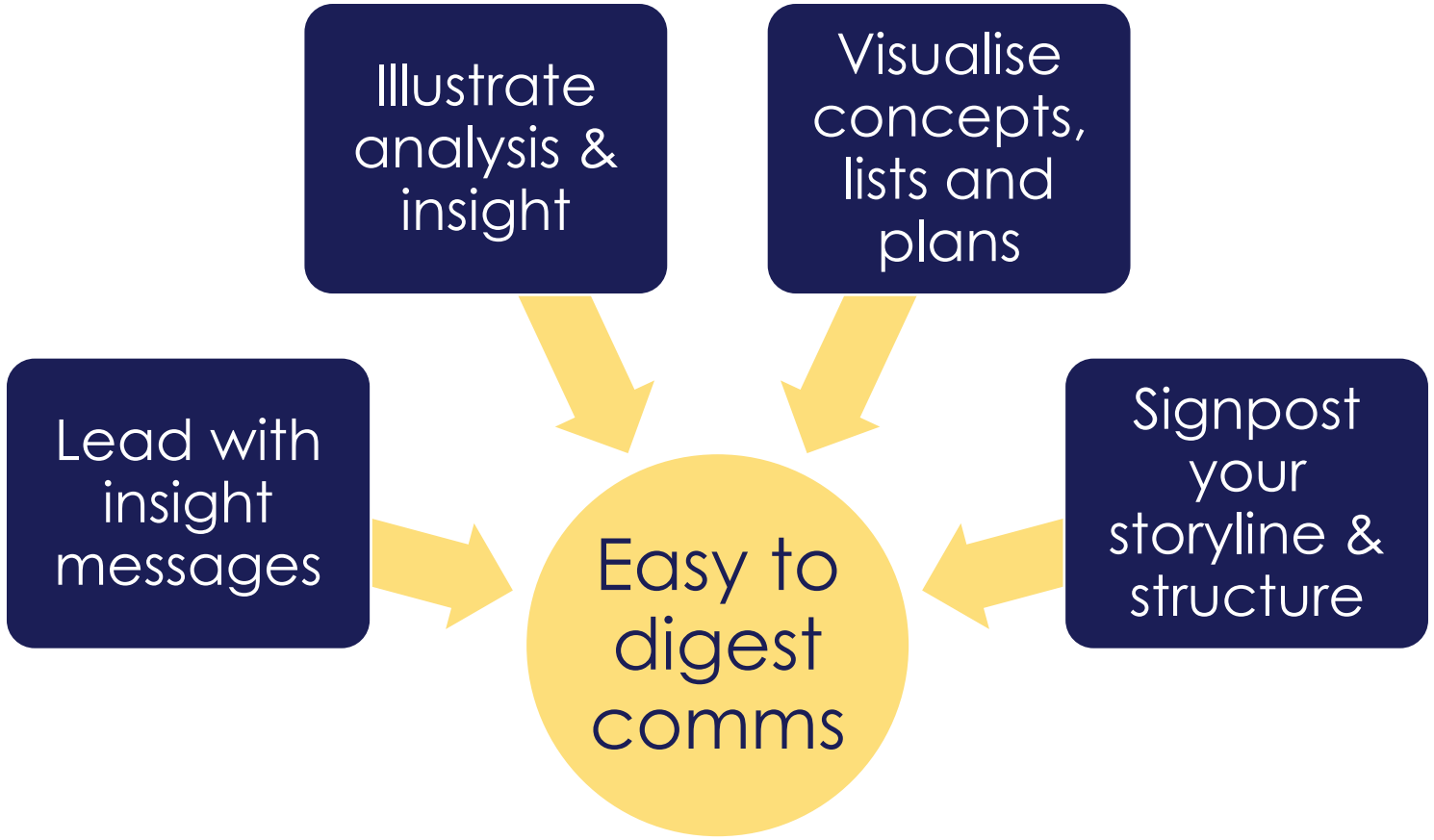
Prepare a storyline exercise

- In your breakout groups, think about a communication you will need to make for your project:
  - Who do you need to engage?
  - What outcome are you attempting?
  - How will you engage them?
  - What supporting materials do you need?

- Plan the storyline for your materials:
  - setup (SCQA)
  - action (hypothesis & evidence)
  - conclusion (recommendations)

- We will wrap up with sharing for 5 minutes as a whole group.

Once your storyline is clear, you'll need to add text and illustrations depending on the format (more text in a document, more illustrations in a slide-pack)



"Do the hard work to make it simple"
GDS design principle 4*

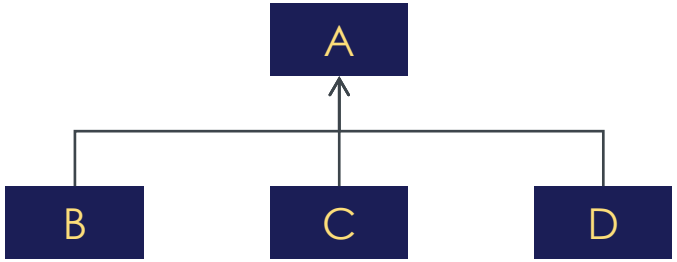
*https://www.gov.uk/guidance/government-design-principles

Deductive vs Inductive flow

Deductive

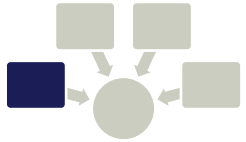
- Step-by-step sequence
- Common for analysis
- Essential if context is needed for recommendation
- Risk of TLDR

Inductive



- Starts with the ‘so what?’
- Common for capturing attention
- Useful to give different levels to different audiences
- Takes effort to do really well

Inductive sentences work well for 'insight' messages – they quickly grab the viewer's attention, and make comprehension easier

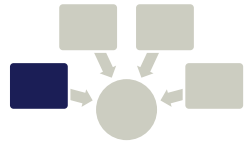


INSIGHT MESSAGES

Deductive sentences	Inductive sentences – 'insight messages'
Where in the tropics could an English army doctor have seen much hardship and got his arm wounded? Clearly in **Afghanistan**	Watson has just returned from **Afghanistan**, as he's an English army doctor with an injured arm who has recently been to the tropics.
Although the risk that this patient has lung cancer is small, there is sufficient risk that I should **refer him** for a chest X-ray to rule this out.	I should **refer him** for a chest X-ray to rule out lung cancer – although the risk that this patient has lung cancer is small it is sufficient to justify an x-ray.
The main barrier to setting up a self-administration programme is the **low number** of eligible patients.	The **low number** of eligible patients is the main barrier to setting up a self-administration programme.
Based on the lower costs, and better alignment with other strategic initiatives, the **centralised model option** is recommended, despite the lower responsiveness.	The **centralised model option** is recommended, based on the lower costs, and better alignment with other strategic initiatives, despite the lower responsiveness.

'flip' sentences with the 'so what?' response first, then the supporting information

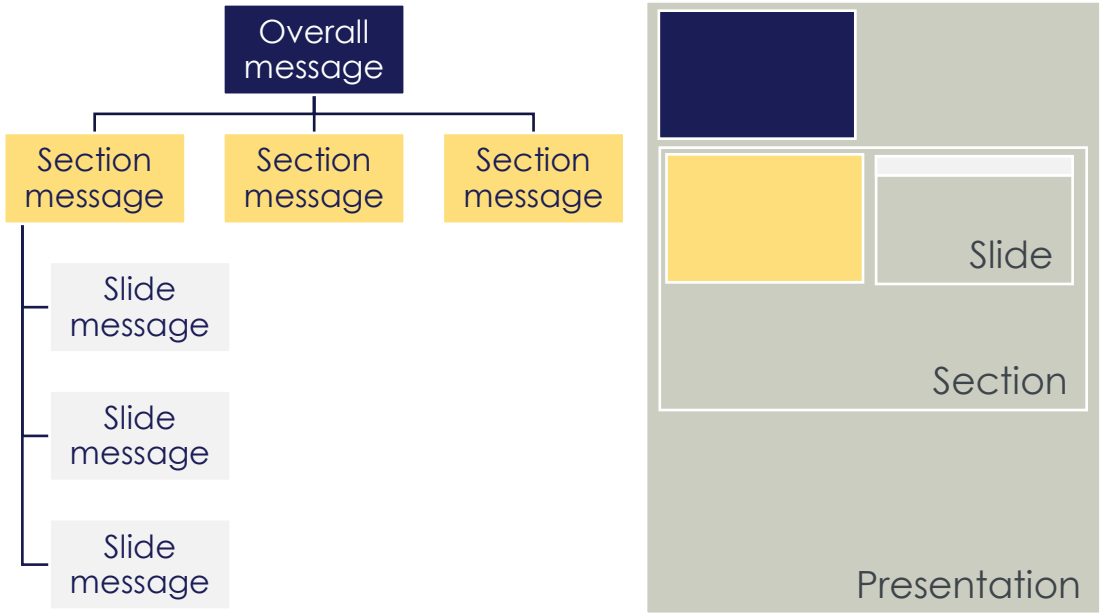
Lead paragraphs, sections, chapters and documents with insight messages to quickly grab the viewer's attention, and support skim-reading by busy stakeholders



LEADING WITH INSIGHT MESSAGES

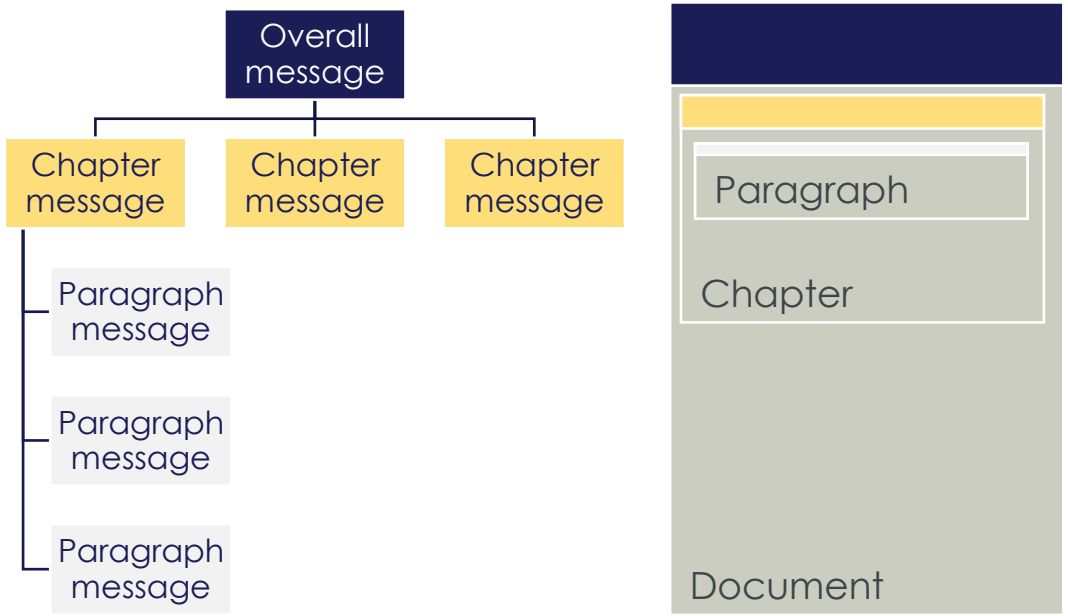
Presentation structure

1. Plan one message per slide, one slide per message
2. Start sections/chapters with their key insight(s)
3. Start the whole document with the key insight
4. If sending as pre-read, start with an executive summary. If only presenting 'live', then finish with one



Written document structure

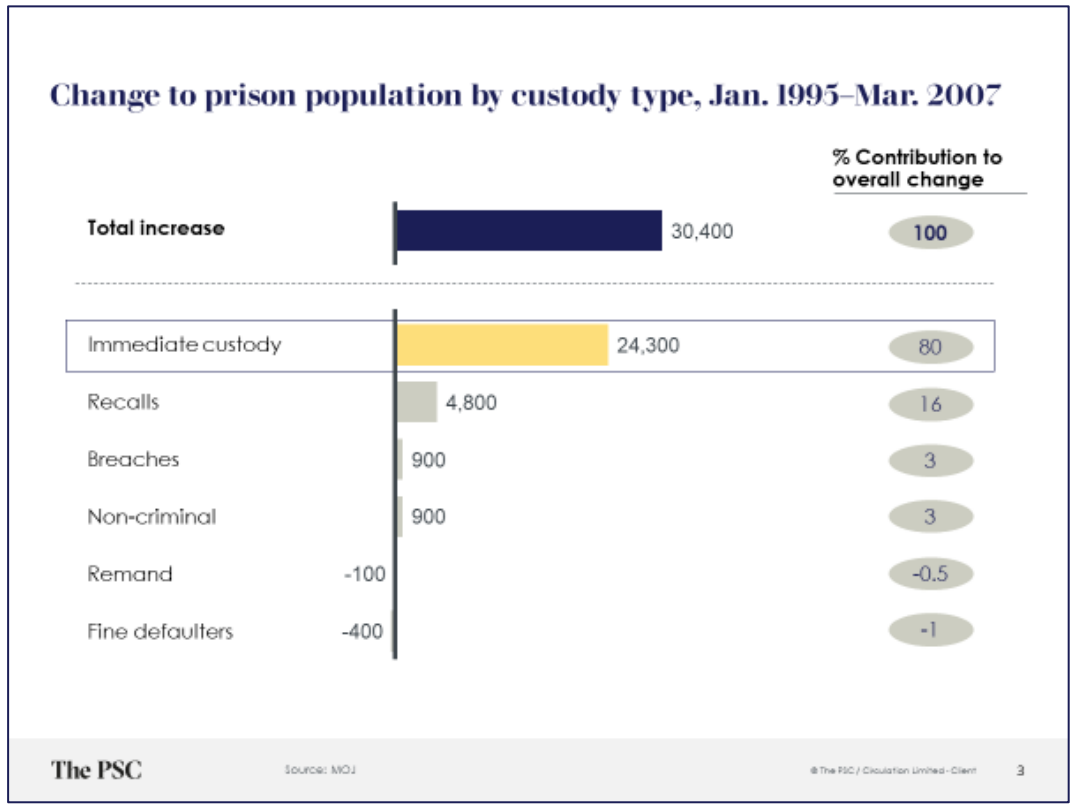
1. Start paragraphs with their key insight
2. Start sections/chapters with their key insight(s)
3. Start the whole document with the overall key insight
4. Start with an executive summary using SCQA



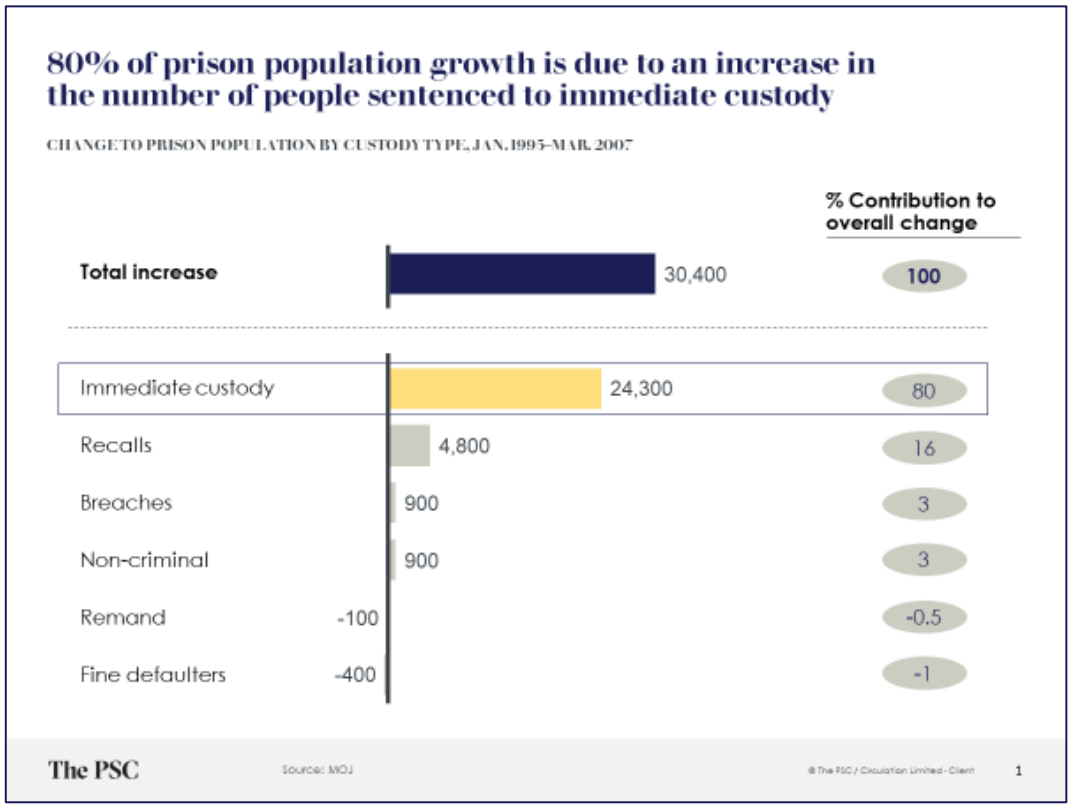
For presentations, create one slide for each 'key message' and write that as the slide headline if sharing for pre-reading or reference

ILLUSTRATE ANALYSIS & INSIGHT – PRESENTATIONS VS REFERENCE

Speaker visual aid only

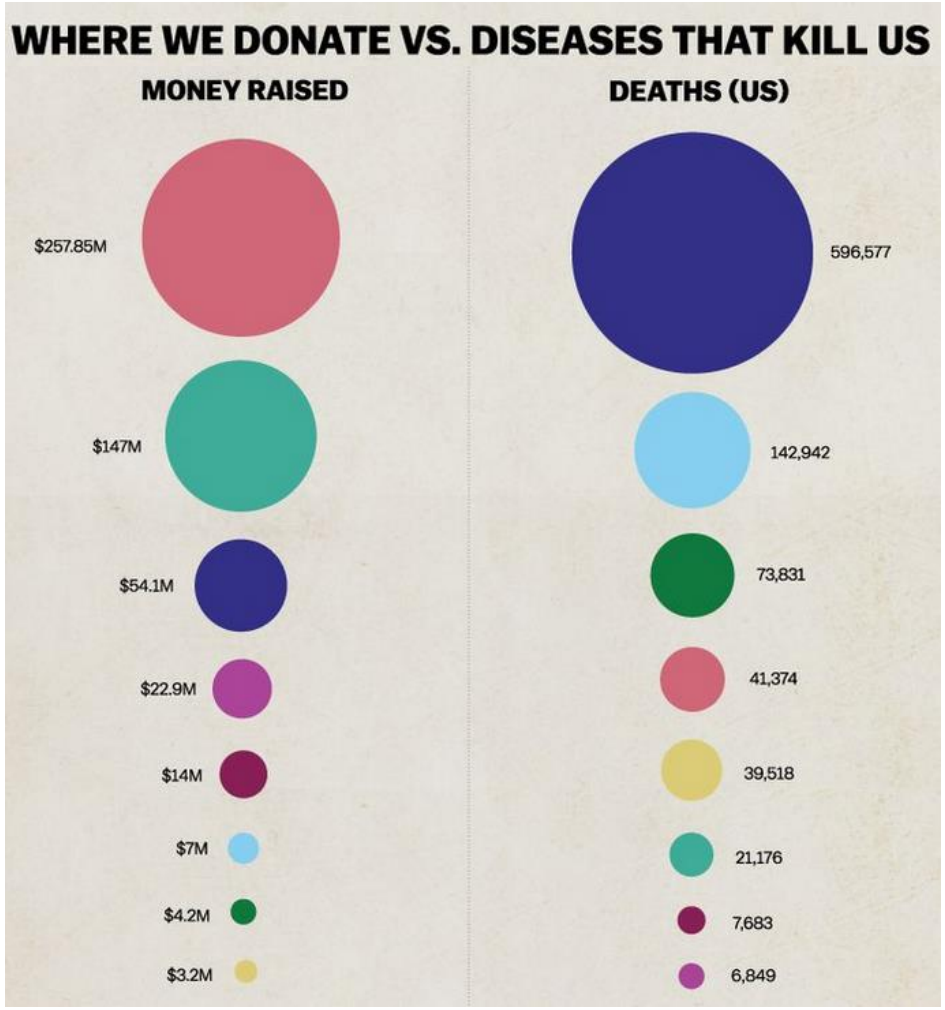


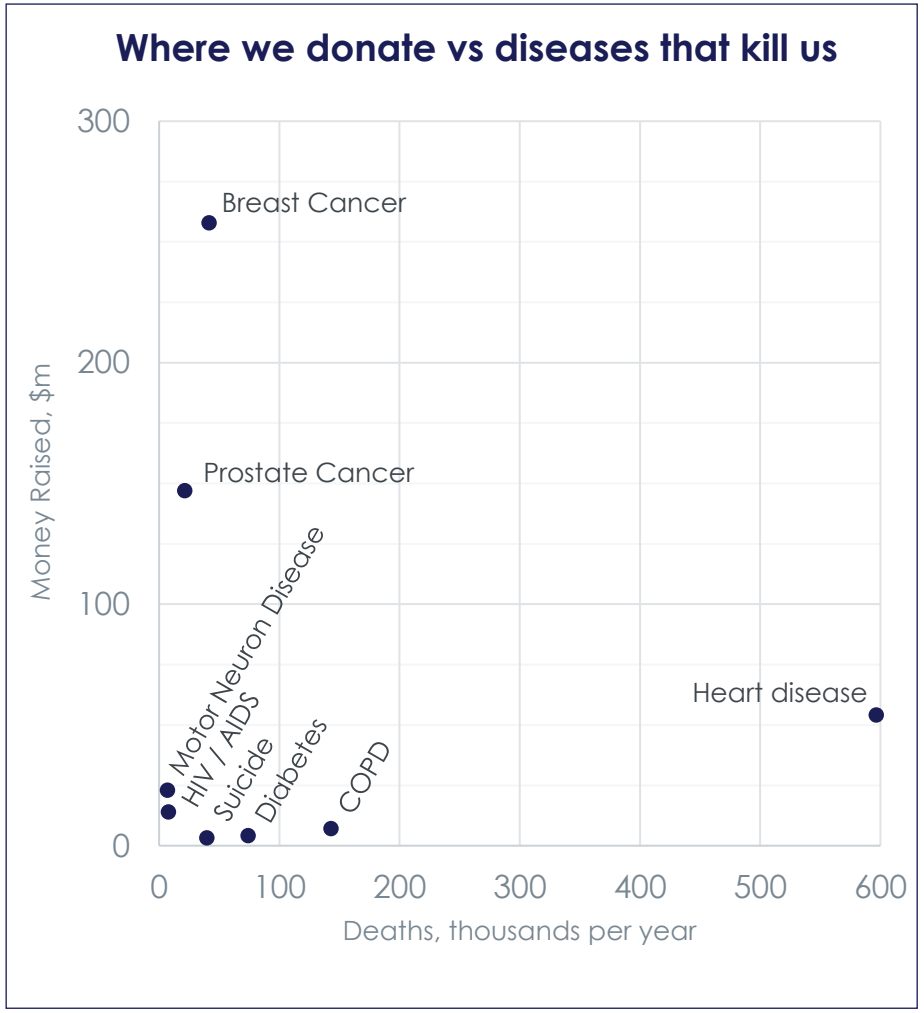
Pre-read or reference as well as presentation



Create a visual that is the simplest possible illustration of that ‘so what’ message, and use colour to ‘code’ the key insight

ILLUSTRATE ANALYSIS & INSIGHT – ANATOMY OF A SLIDE





Source: https://www.vox.com/2014/8/20/6040435/als-ice-bucket-challenge-and-why-we-give-to-charity-donate, based on Death statistics from 2011 CD report, Money raised from listed charities

Which of these are easiest to read, or get a sense of when skimming? When would you use each one?

VISUALISING CONCEPTS, LISTS AND PLANS

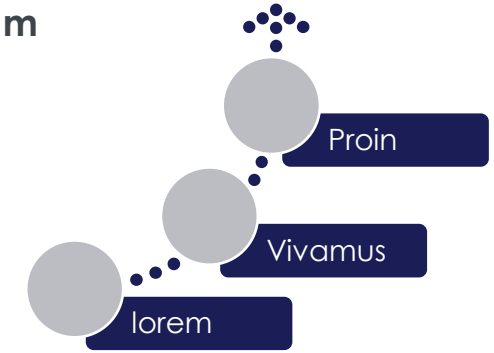
Prose paragraphs

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Bulleted List

- Lorem **ipsum** dolor
- Maecenas **porttito**r.
- Nunc **viverra** imperdiet
- Vivamus a **tellus**
- Pellentesque **habitant**
- Proin pharetra.

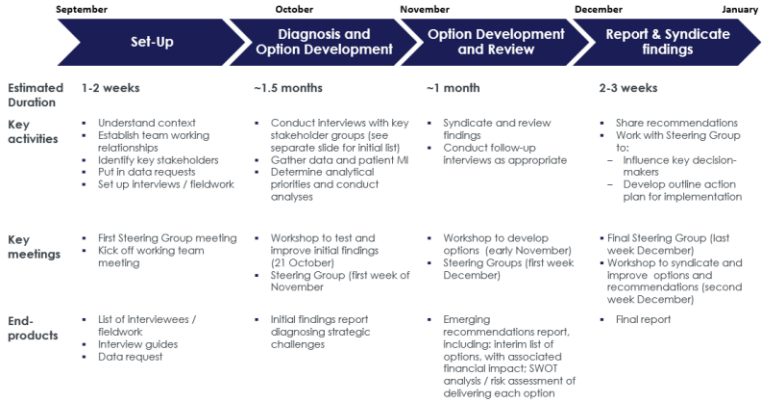
Diagram



Table

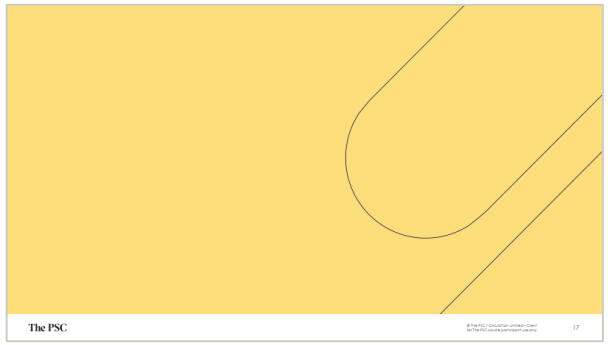
	Outcomes	Actions
Lorem	ipsum	• Lorem ipsum dolor • Maecenas porttitor.
	porttitor	• Nunc viverra imperdiet • Vivamus a tellus
Vivamus	a tellus	• Vivamus a tellus • Pellentesque habitant • Proin pharetra.
	Pellentes	• Maecenas porttitor. • Vivamus a tellus

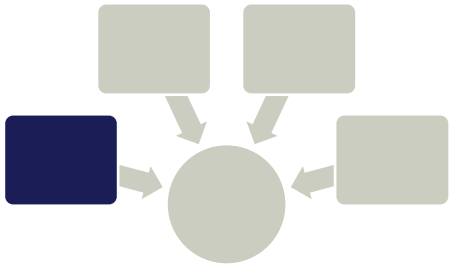
Plan



Which of these visual formats, visual mini-trackers, numbering and text styles have been used in this course – what did they do?

SIGNPOSTING STRUCTURE & STORY





Lorem ipsum

Nunc viverra

Vivamus a **tellus** erraturm
Pellentesque habitant

1.
2.
3.
4.

Once your storyline is clear, you'll need to add text and illustrations depending on the format (more text in a document, more illustrations in a slide-pack)

"Do the hard work to make it simple"
GDS design principle 4*

*https://www.gov.uk/guidance/government-design-principles

Single slide exercise

- Develop one slide or exhibit (this can be for your project, or this course, or anything else), using these best practice principles

- We'll take turns to share each slide and test:
  "Does the visual lead us to believe the statement?"

Review & Reflect

Strategic Thinking

Review: Strategic Thinking

PROGRAMME AIMS

- This programme is intended for staff from operational backgrounds who need to apply a **strategic mindset** to their role and business area
- We will introduce a **toolkit** for strategic thinking, problem solving, planning and change management, to help you:
  - Understand **complex/challenging environments** and adapt strategic thinking appropriately
  - Use conceptual frameworks to help **define strategic, operational, or policy problems** and options swiftly and in clear and simple terms
  - Use conceptual frameworks to **think in a structured way**, using appropriate tools to present arguments persuasively
  - Synthesise **clear and simple insight for senior decision makers** and stakeholders, and build confidence in **communicating, influencing and collaborating** with those audiences
- You will leave with an awareness of these tools and will have had some opportunity to practise their application
- Further practice is key to making them a part of your problem-solving armoury

The Strategic Thinking Programme

Pre-work	Challenging Environments	Understanding the challenge	Developing Insight	Stakeholder Engagement
• Reading • Draft PDS	• Introduction • Challenging environments • Our environment • Synthesising Insight (1)	• Defining the Problem (PDS) • Structuring the Problem (Issue Trees) • Synthesising Insight (2)	• Developing insight (Hypothesis Trees) • Planning the work (boat chart workplans) • Options Appraisal • Synthesising Insight (3)	• Stakeholder Engagement • Influencing Styles • Synthesising Insight (4) – Communicating with stakeholders • Review & Reflect

Reflection: Strategic Thinking

- Spend 10 minutes in your groups reflecting on your learning and how you're feeling at this point
  - Benefits
  - Concerns
  - Questions

- Share thoughts from each group

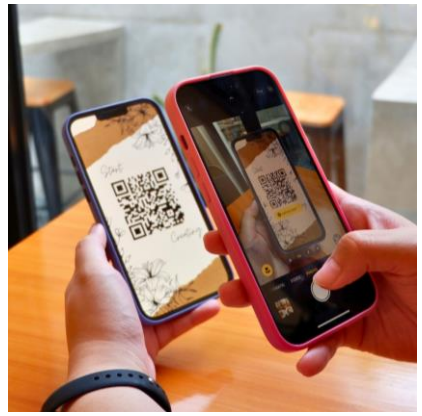
Before we finish…

POST-COURSE SURVEY

Complete the following feedback form to rate your confidence with different elements of project work and provide feedback on this training session.

- **Link to post-course survey:** https://forms.office.com/e/WJFJpRbDRi
- **Name of this course:** An Introduction to Strategic Thinking
- **You can also follow the QR code** below to access the form:

You can scan the QR code with a **mobile device camera** to access the form



Commissioned by the KPMG consortium for:

Government CAMPUS

Designed & delivered by:

The PSC

An Introduction to Strategic Thinking