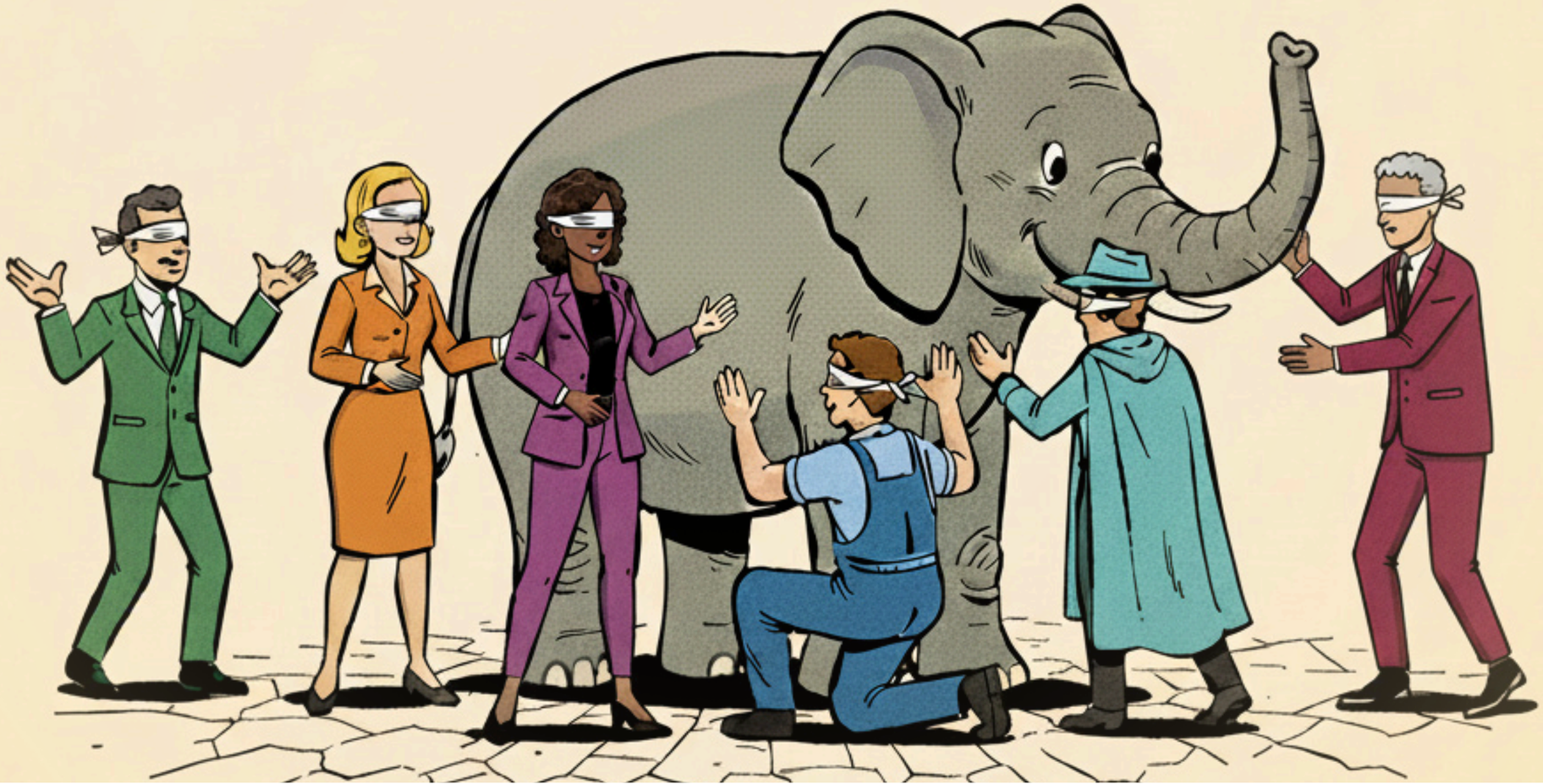
An EDGY Tool for Strategy

Intersection 25 in Brussels

Jean-Sébastien Daigle & Daniel Gona

The Tale of The Blind People and the Elephant



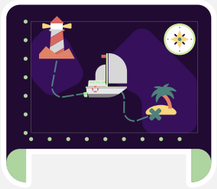
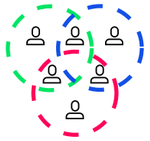
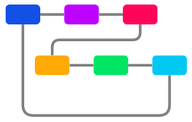
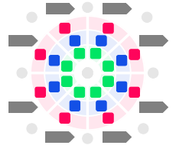
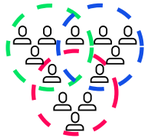
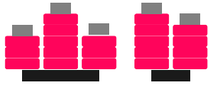
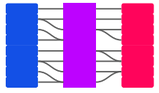
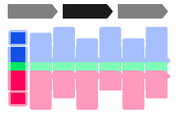
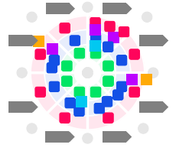
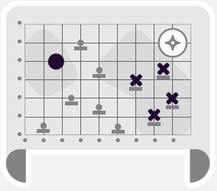
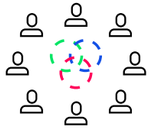
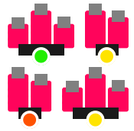
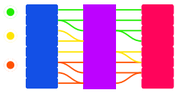
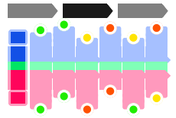
How do they solve the challenge?

EDGY Advanced Workshop

Easy to use, hard to master

Intersection Conference 2024, Rome

StratEDGY - activating the Zurich University of the Arts living strategy

	The People	Facet Model	Simple Maps	Relation Maps	Blueprint	Milkyway	The universe
Abstract Understand		 Who is core to our ambition?	What is our shared understanding?	What are our core elements?	 How are our core elements connected?	What are our core activities?	 How do our core elements and steps work in a cycle?	Who influences our entreprise, and what is our impact?
Balenced Co-Create		 Who can fact-check these elements?	What are our key elements?	 What other elements are there?	 How are the other elements connected?	 When are the elements connected to these activities?	 Where are the other elements placed in the cycle?	What are the elements of influence and impact?
Precise Analyse		 Who can give us an outside perspective on our entreprise?	What is the status of these elements?	 What is the status of these elements?	 What is the status of these relationships?	 What is the status of these steps?	What works, what doesn't, and where are the gaps?	What works, what doesn't, and what's missing?

&friends

PRINCIPLES STRATE*D*GY

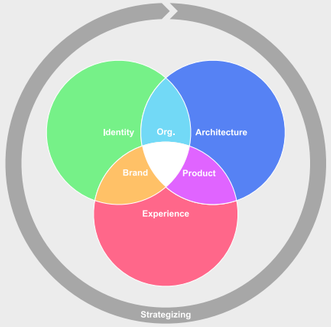
HOLISTIC
EDGY facets to intersect perspectives

ITERATIVE
Feedback loops to adopt to dynamics quickly and proactively

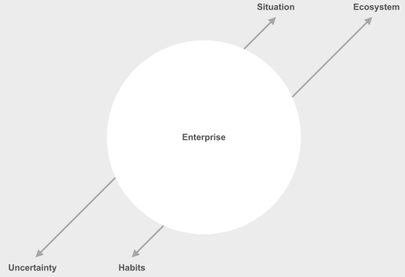
PARTICIPATORY
Broad advise and expertise to gain quality and traction

FOCUSSED
Flight-levels, horizons and context to raise orientation

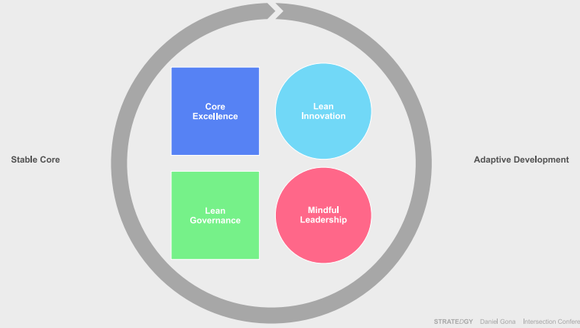
FRACTAL
Aligned autonomy to reduce mental load



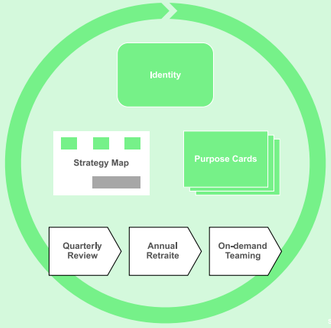
ENTERPRISE DYNAMIC ENVIRONMENT



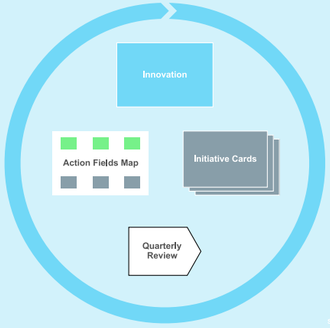
BALANCE STABILITY AND AGILITY



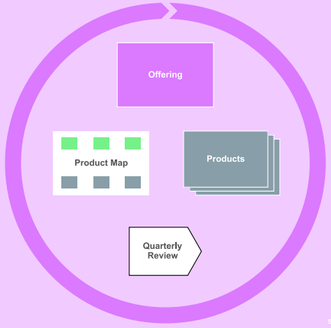
IDENTITY BOARD TEAMING



INNOVATION ORGANISATION INITIATIVES PORTFOLIO



CORE ORGANISATION PRODUCT PORTFOLIO

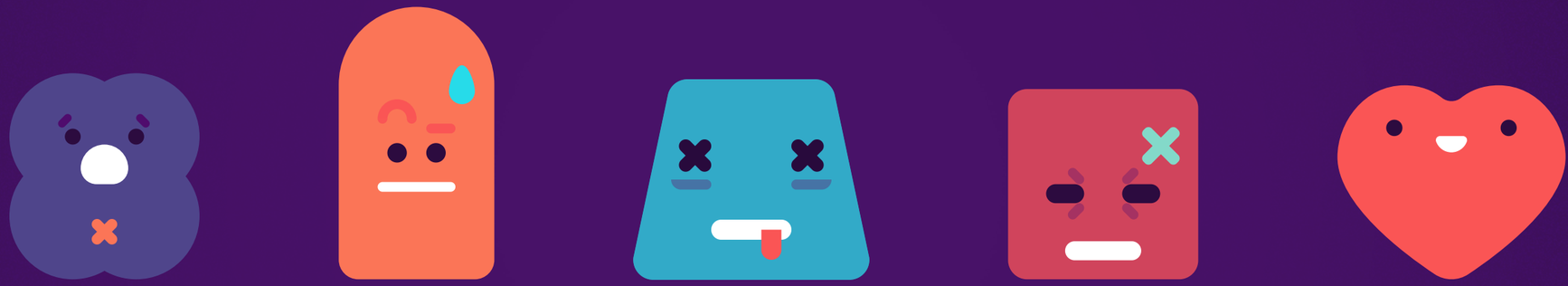


In early EDGY application common pattern surfaced.

October 2024

Let's figure out how to create an EDGY tool for strategy.

Untangling the mess is journey...



of curious people working together...

Eric Letarte

Wolfgang Goebl

Milan Guenther

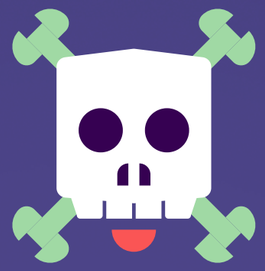
Helgi Björgvinsson

What if we codify our consulting practices?

What if we curate popular tools?

What if we codify a state of the art framework?

What did we learn?



Observed pitfalls

1

Dominant Logic

2

Capability

3

Accountability

1

Dominant Logic

"This Elephant is like a Snake"

We can intersect diverse perspectives to solve wicked problems.

We need to train our employees better!

Chief Human Resources Officer

We should rethink our WHY!

Chief Executive Officer

We need to optimize our IT infrastructure!

Chief Information Officer

Let's focus on a new market and adapt our brand!

Chief Brand Officer

We focus features requested by our clients!

Chief Product Officer

We need to become user-centric!

Chief Experience Officer

Dark Pattern

In meetings everybody sells their point of view.

Dominant logics limit understanding.

Strategy is tinted by individual identities and ambitions.

Everybody draws **different elephants.**

StratEDGY

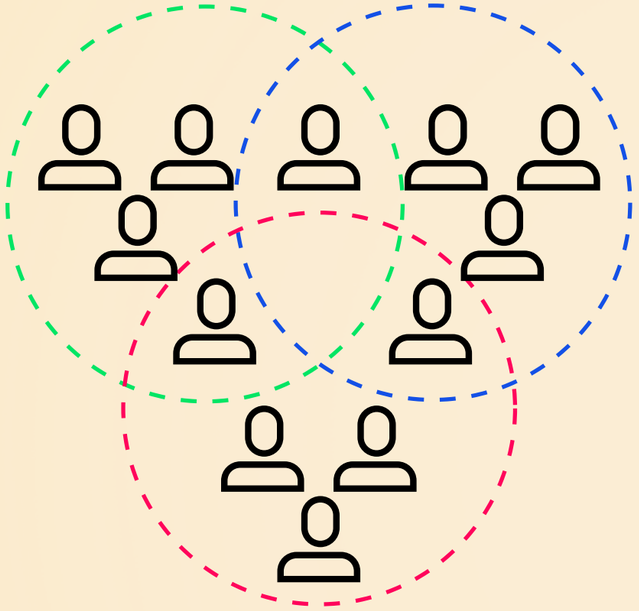
In facilitated sessions everybody adds to a shared ambition.

Diverse perspectives solve challenges.

StratEDGY is based on shared purposes, connections are explored together.

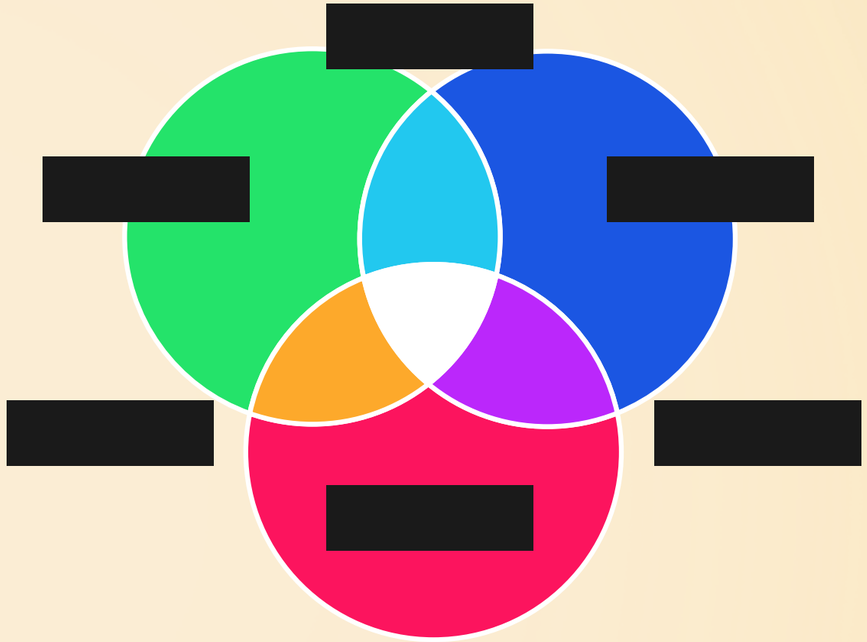
Everybody is enabled to draw **a similar elephant.**

StratEDGY tools



The People

Who knows these elements?



Facet Model

What is our shared understanding?

Enabler

Virtues of StratEDGY people

Curiosity

Engage with emergence and the unknown

Courage

Explore and imagine novelty

Empathy

Experience and understand what others experience

Perseverance

“Rome wasn’t built in a day”

2

Capability

"Strategy is a 10 Year Plan"

We can manage limited capabilities to make strategy stick.

Dark Pattern

Varied understanding of strategy and outsourcing to "trusted advisors".

the strategy capability is weak

strategic direction does not stick

the actual strategy emerges as a pattern "in the rear mirror"

StratEDGY

In-house capabilities are enabled and developed to sustain strategy.

agree on a shared definition of what strategy is

enrich and elevate established processes for strategic work

balance limited resources across the whole strategy lifecycle

What is Stategy, really?

Henry Mintzberg

Plan

Consciously indended course of action

Pattern

Emergent organizational behaviors

Ploy

Tactics to outsmart competition

Position

Relative location in environment

Perspective

Ment to shape culture and decisionmaking

*Practice**

Living Capability for dynamic environments

What is Stategy, really?

Roger Martin

*A strategy is **a set of choices** that positions the company uniquely [...] in order to create a **sustainable advantage** and **superior value** compared to the competition.*

Strategy

A set of choices a practice to create and sustain an advantage

StratEDGY

A focus (set of choices) to explore, imagine, realize, and sustain stakeholder value across all facets and intersections.

Ambition Complexity x Strategy Type

Complex

The future is unknown
The outcome uncertain

Complicated

The future is variable
The outcome predictable

Clear

The future is certain
The outcome always the same

Unique Stratégie

No reference on what to do
Use methodology to move foward

Strategic patterns

Strategic model already exists.
Investigate, evaluate and choose.

Ambition Complexity x Strategy Type x People

Complex
Unique Stratégie

Need a strong shared understanding

Require active collaboration

Need to combine strategic approaches

Complicated

Clear
Strategic patterns

Need a clear goal

Need strong communication and sychronisation

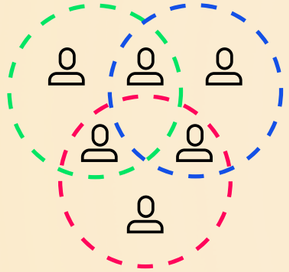
Need to agree on specific strategic approaches

Trusted external advisor
at **Procter & Gamble (P&G)**
to then-CEO A.G. Lafley.

Roger Martin’s role

StratEDGY tools

The People

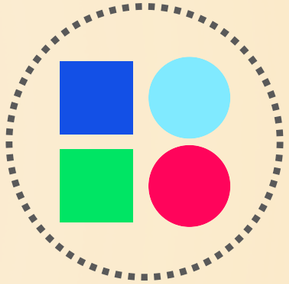


What is our shared understanding?

Simple Maps

What are our most strategic elements?

The Balance



How do we balance our capacity?

4

Accountability

"Strategy is a top management domain"

No one likes to just implement without adding their own expertise and experience.

Dark Pattern

Strategy is a top management domain

Meaning emerges from creation

Outsourcing feels more like keeping control than delegating

Conflicting targets of strategy realisation and "daily business"

StratEDGY

StratEDGY is collaborative act

Agree on governance

Enrich and elevate established processes for strategic work

Balance limited resources across the whole strategy lifecycle

Should strategy be top-down or bottum-up?

It has to go back and forth. [...] I think everybody at their level of the organisation has choices that they are responsible for making.

What I am dead set against is the notion that the people at the top make strategy choices and then everybody else executes.

Roger Martin

Author, teacher and advisor

QCT : QuébecTech

Zoomed out

Let's start with a vision

Let's figure some Experience, products and architecture elements

Zoomed in

Let’s build the team to deliver the previous elements.

AQ : Aliments du Québec

Zoomed out

Zoomed in

Let's review your strategy

what do people really want?

Let's repair what's we have

Let's audit what was created

M : MNHQ

Zoomed out

We want IoT

Zoomed in

But Why ?

What would be cool ?

Let us figure it out

Interim conclusion and guiding principles

Dark Pattern

Dominant Logic
Directive from individual perspective

Trusted Advisor
Strategy capability outsourced

Limited to top management
Narrow utilisation of capabilities

Goal Cascade
Direct coupling creates dependencies

StratEDGY

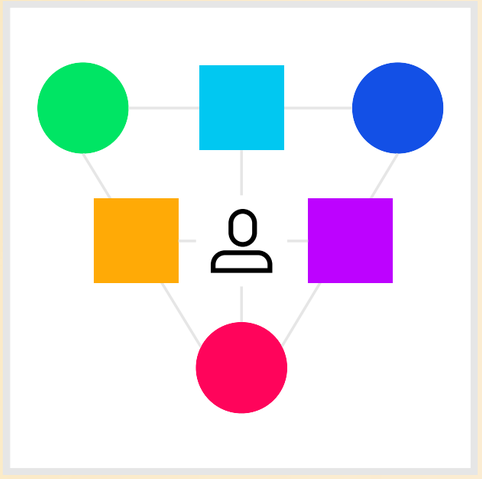
Holistic
Collaborative intersection of perspectives

Strategy Facilitator
Participatory capability developing

Network across the enterprise
Broad utilisation of capabilities

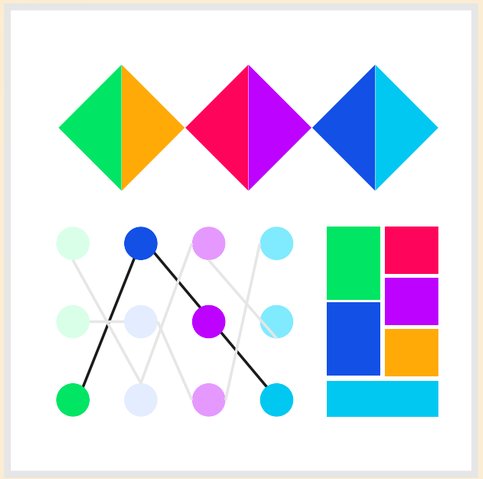
Fractal System
Loose coupling reduces dependencies

Benefits



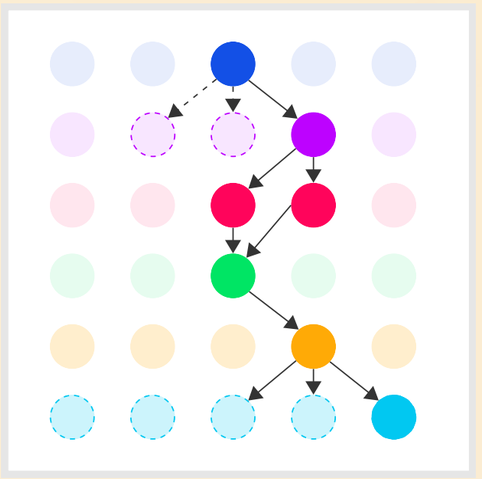
Discover & Fokus

To **understand tensions**, you need a system that maps complexity. EDGY helps you **understand how elements are connected,** identify gaps, and share insights across people, teams, and silos.



Explore & Imagine

Use EDGY as a **strategy development tool**. You can also use its language on top of other methodologies to **bring consistency and depth** to your various initiatives.



Zoom-in and Decide

EDGY canhelp you **keep track of your strategic decisions**. By making conscious choices and tracking them, any **team can make decisions faster and more easily.**

Implement and Sustain

Planning with EDGY helps people **understand a plan** across the facets and intersections. This makes it easier to **align the planning with the strategy**.

StratEDGY Praxis

This is how we do it*

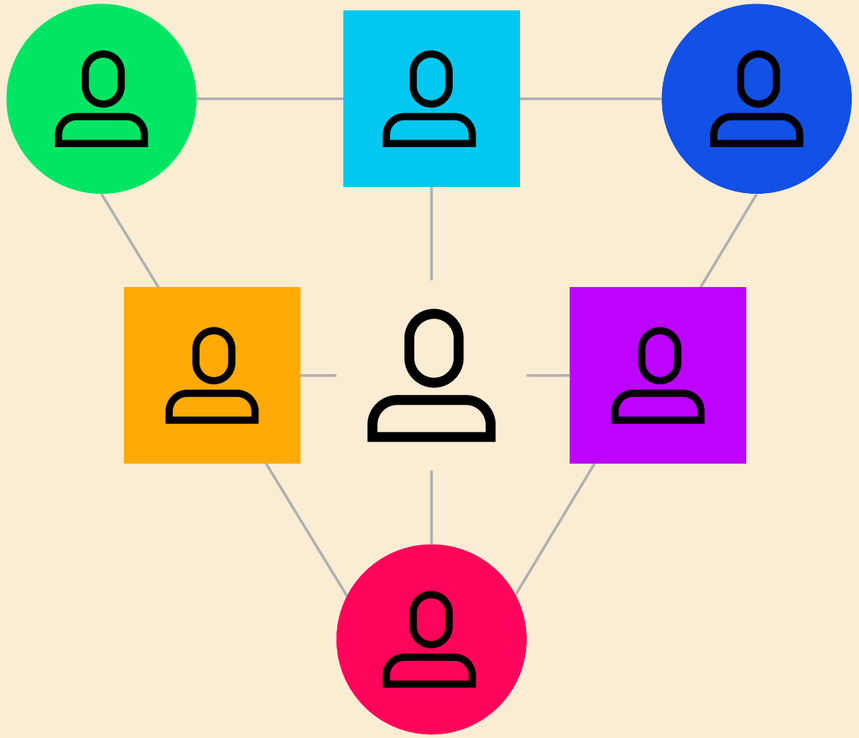
*a first glimpse...

I. Focus

The power of strategy is **giving focus**, a policy for decisions to guide action.

The strategic context typically covers **qualitative discussions**.

Determine the challenge you want to address and **gather the individuals** you need to approach your challenge.



I.I. Shared Purpose

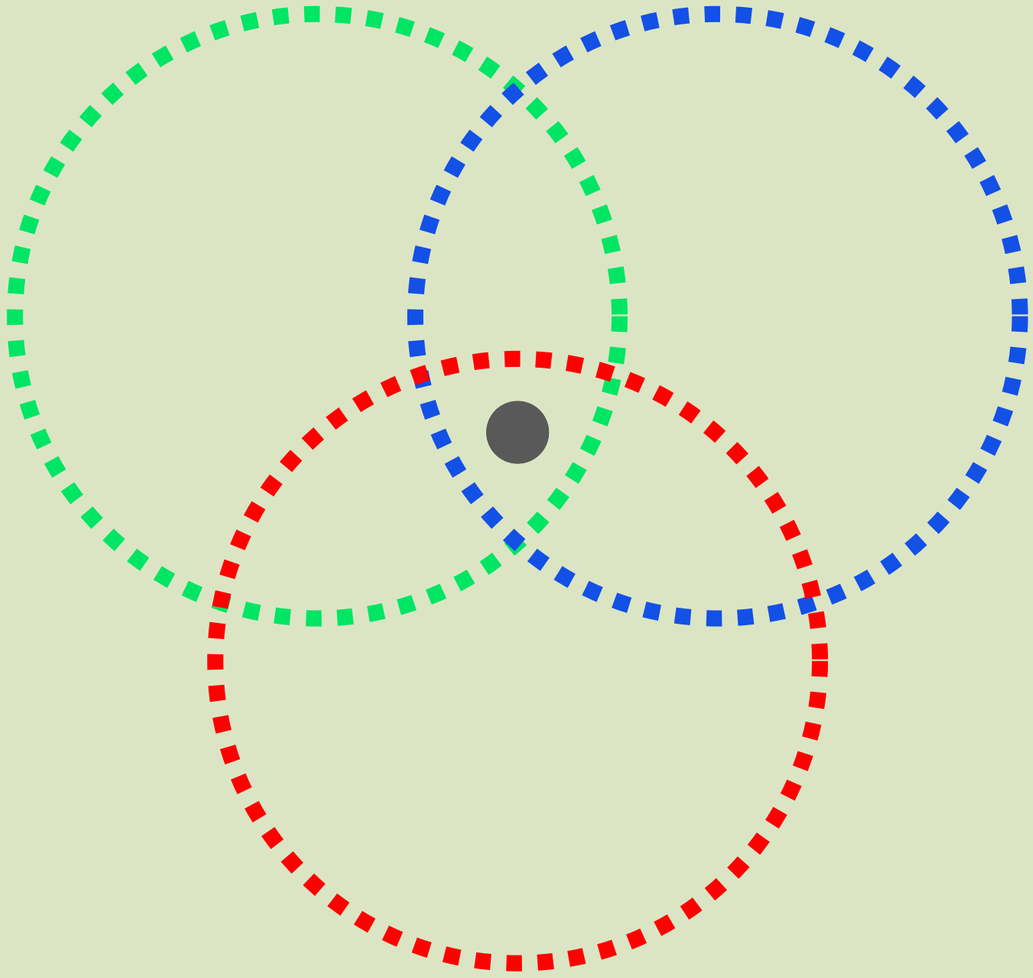
Start with the people, their individual purposes,
to support involvement and commitment.

You can apply the Hedgehog concept*,
to explore and imagine a **shared purpose**,
the north star guiding your focus.

Leading Questions

- What are you really really good at?
- What do you really really like doing?
- What really really moves you?

*cf. Jim Collins, 2001 - Good to Great



Focus on the intersection of

- your strengths – the **tasks** people hire you for
- your passion – the **capabilities** you would like to be hired for
- your drivers – the **stories** that inform your decisions

I.II. Playing Field

Zoom in and out to **focus your playing field**:

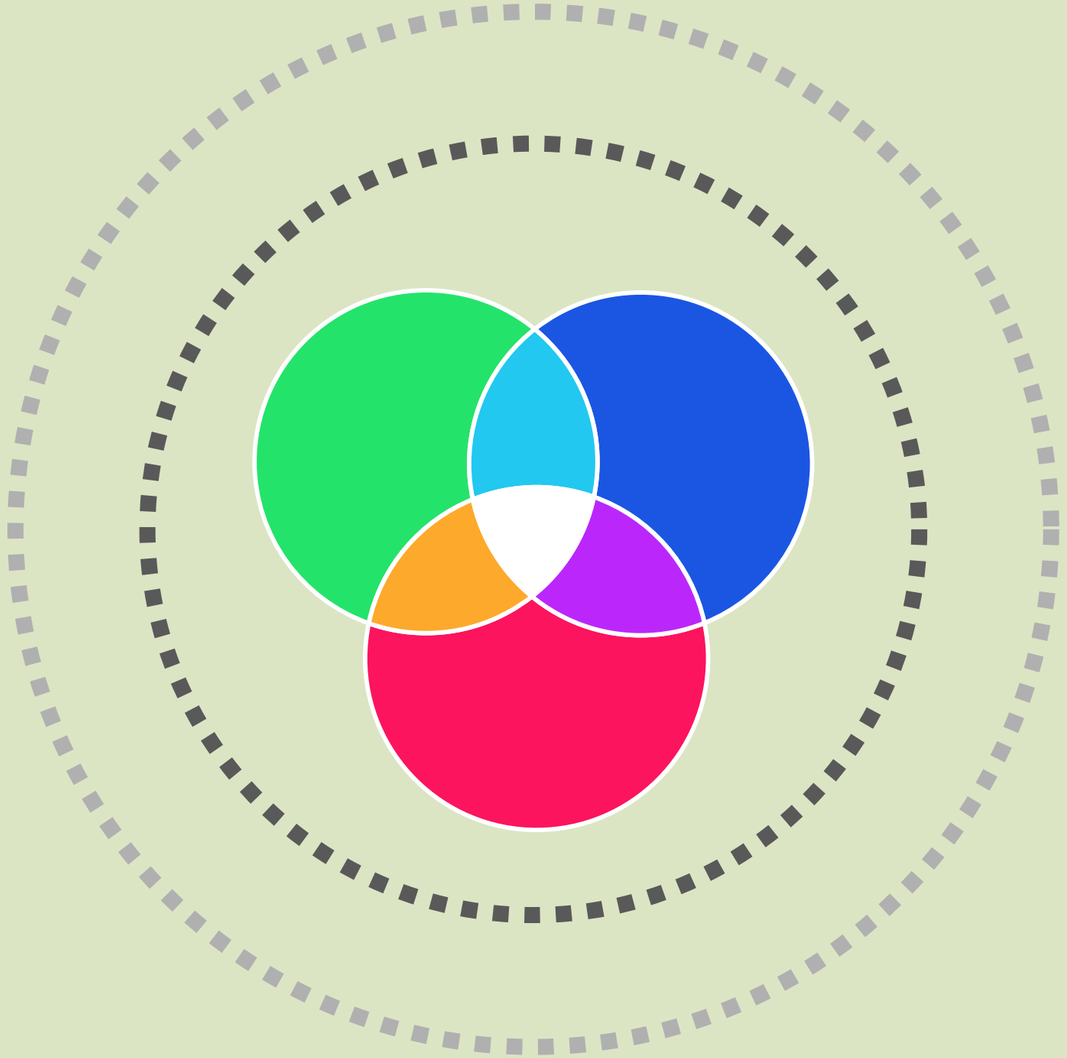
- Ecosystem
- Enterprise
- Facet
- Element

You can apply the Circle of Control concept*, to identify the level of your strategy.

Leading Questions

- What concerns our challenge?
- What can we influence?
- What can we control?

*cf. Stephen Covey, 1989 - 7 Habits of Highly Effective People



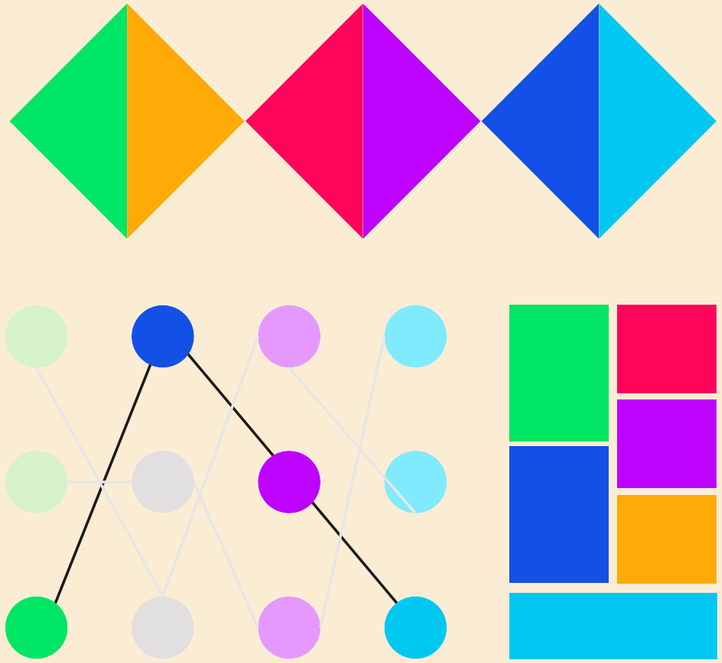
Start at the enterprise facet you feel at home. **Zoom** in and out to shine light on the areas you can proactively generate **impact**.

II. Imagine Ambition and Explore Baseline

Most tools applied in strategy cover singular Enterprise facets and elements only.

It is useful to engage people with the tools they know best to analyse aspects of your enterprise in detail and curate a baseline.

Before going into analysis we encourage you to imagine your preferred future(s) free from current systems limitations.



*this approach is known as Backcasting

II.I. Ambition

Start with your preferred future(s). one or more scenarios of how your enterprise and its environment shift, once you completed your challenge.

Leading Questions

- What if you solve this?

Map the **future state** of your enterprise on the the top abstraction level.

II.II. Baseline

Gather your expertise, precise information on your enterprise status quo:

- ...

Leading Questions

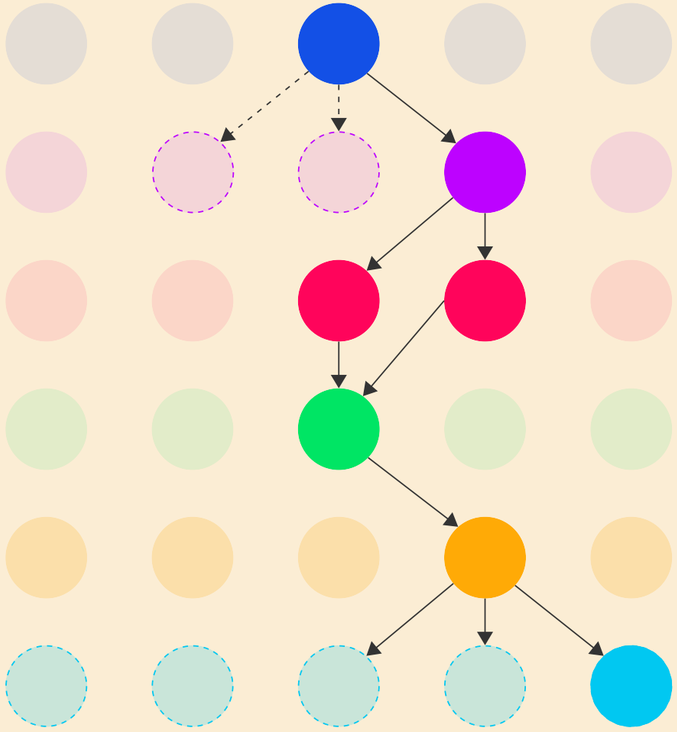
- What influences us?
- What drives our decisions?
- How are we organised?
- What are we excellent in?
- What do we offer?
- What are we hired for?

Map the **current state** of your enterprise by curating existing models and tools. EDGY allows you to identify the connections across individual perspectives.

III. Imagine Shifts and Explore Actions

Strategy is about making choices towards realising your ambition.

One approach to identify the "right" choices is imagining the impact of your ambition over time, the shifts in the experience and explore the actions you can take to realise this shifts.

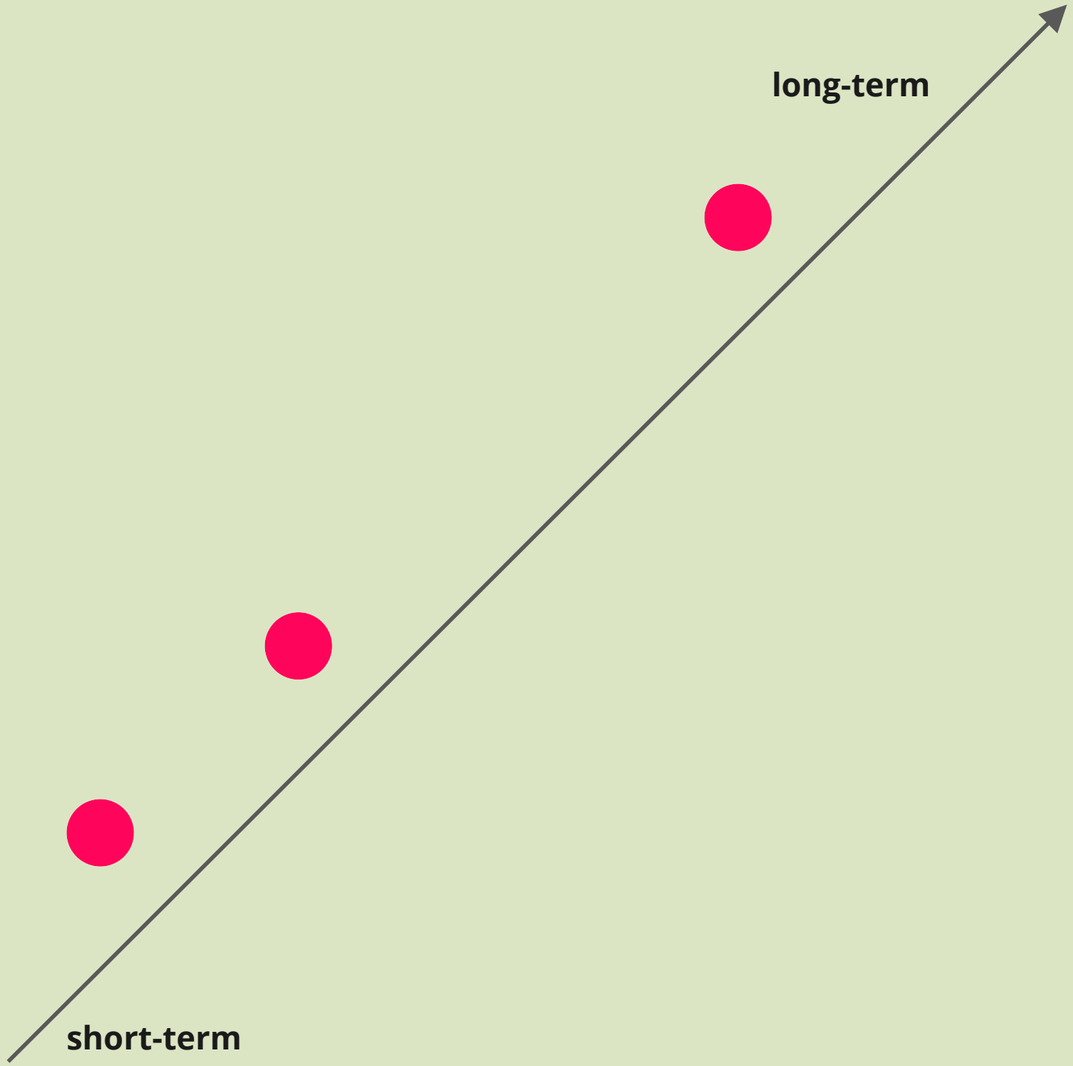


III.I. Shifts

Imagine how the experience would be different from short-term to long-term.

Leading Questions

- What lasting change will be long-term?
- What would be observables shifts near-term?



Agree and capture the long term shift, characterising your challenge.
Identify near-term shifts, first good steps towards the long-term shift.

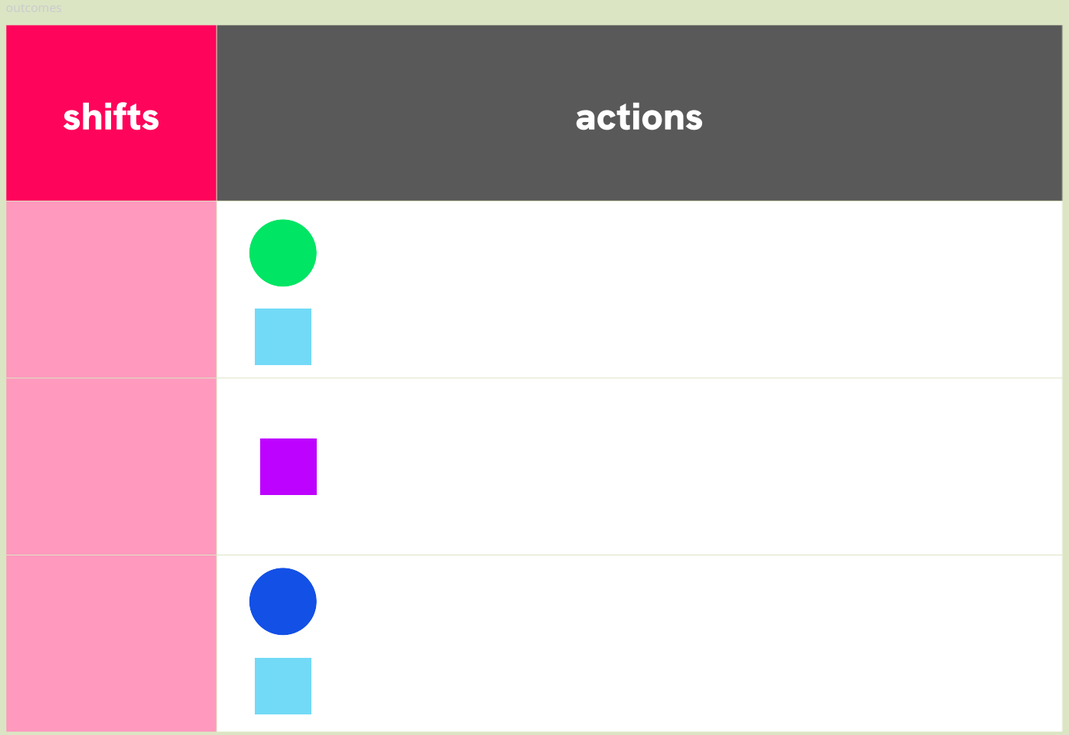
III.II. Actions

Explore what actions you can take to realise the shifts. Focus on assumptions with evidence.

Actions might be required in multiple facet. We encourage you to formulate them as measurable key results, to make qualitative shifts tangible.

Leading Questions

- What would have to be true ?

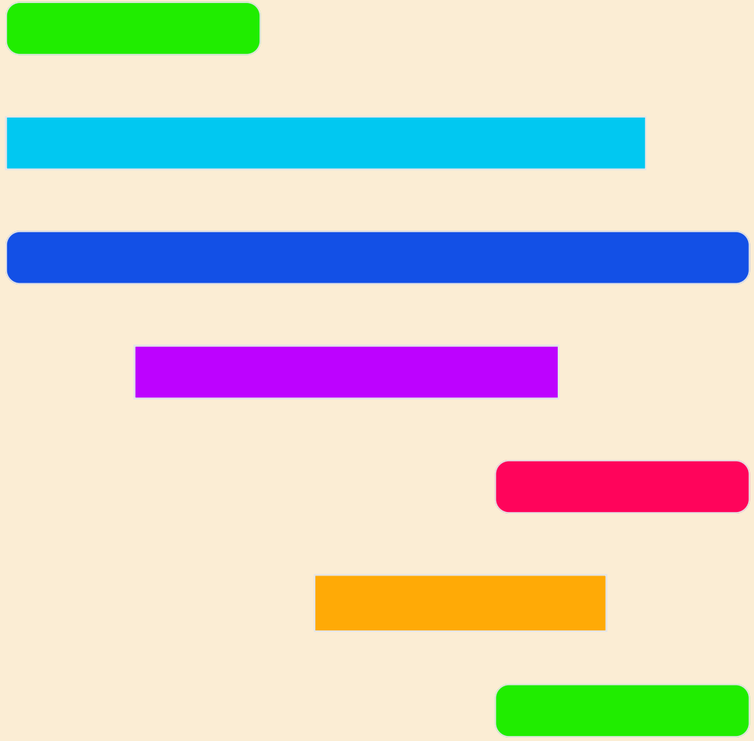


Start in any enterprise facet. **Move** clock-wise, counter-clockwise or even zig-zag to shine light on **every facet** of your enterprise. You can use the edgy facet **core links** for that.

IV. Sustain Practice and Plan Delivery

A major challenge in making strategy stick is balancing the capacity invested in delivering the strategy while sustaining your everyday business.

One approach to achieve a sustainable balance is lean portfolio management. Being a planning method it follows envisioning the strategy and can close the "strategy gap".

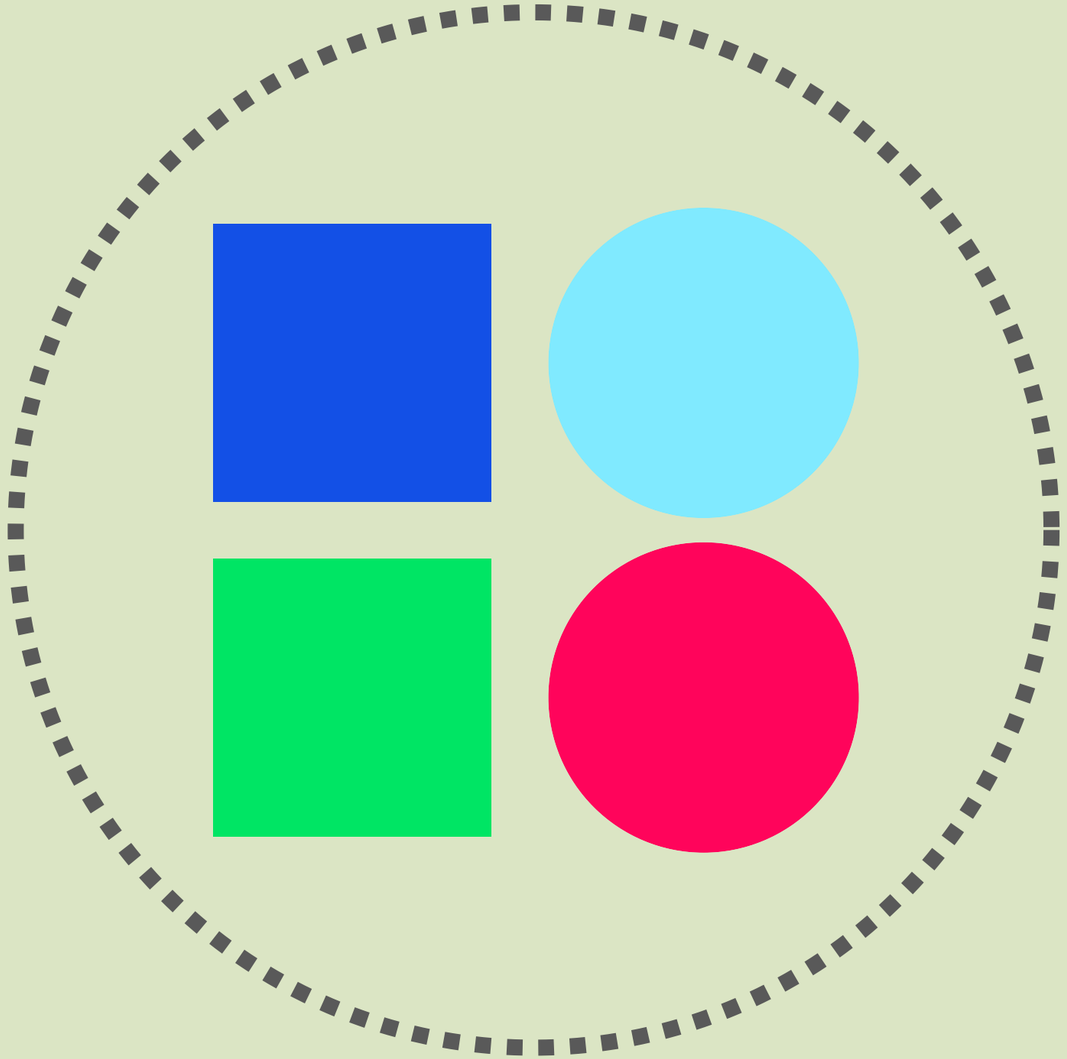


IV.I. Sustaining Practice

Decide how to **balance your assets** to successfully deliver your strategy while maintaining a robust enterprise.

Leading Question

- What capacity of our people and assets do we invest in change?



Sustain your enterprise by giving guidance balancing your capacity.

IV.II. Planning Delivery

Manage your **strategic portfolio of actions** to successfully deliver your strategy while maintaining a robust enterprise.

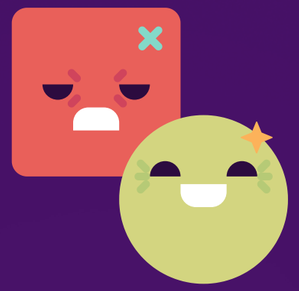
Leading Questions

- What did we achieve already?
- What do we need to focus on?
- What will we do next?

portfolio

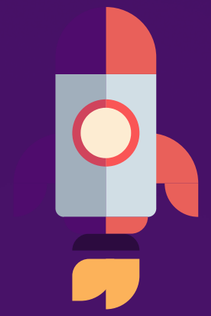
	shift	shift	shift	shift
sustain				
realise				
focus				
imagine				
explore				

Guide your strategy delivery by managing your actions in a strategic portfolio.



What resonates for your context?

Please share your reactions



Start with StratEDGY today!

Please talk to us in the breaks.