

Tools for *Change-mapping*

Connecting business tools to manage change



Tom Graves with Joseph Chittenden

Change-mapping tools

Expanding the Change-mapping tool-set

"I warmly recommend this book to change agents who are searching for a pragmatic change method and tools that make their impact felt immediately. I am sure you will find the tools and ideas presented valuable and gracefully challenging conventional practices. I wish I had known some of these tools much sooner in my career.."

Jörg Schreiner,
Managing partner co-shift, Germany

"...Tom Graves shows us a set of tools that, when combined with the easy to follow structure for Change Mapping in the first book in this series, provides anyone in a change effort the ability to navigate uncertainty, and find answers to the most challenging problems. Perhaps not as apparent is the recursive, scalable and extensible nature of the material. Able to be used at every scale, and extended to accommodate any existing tools, the Change-Mapping approach set out in this series creates a consistent and reliable way of identifying real issues in organisations, and helping participants collaborate effectively in their resolution."

Darryl Carr
Enterprise Architect
Editor, Enterprise Architecture Professional Journal

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First Edition

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Tom Graves with Joseph Chittenden

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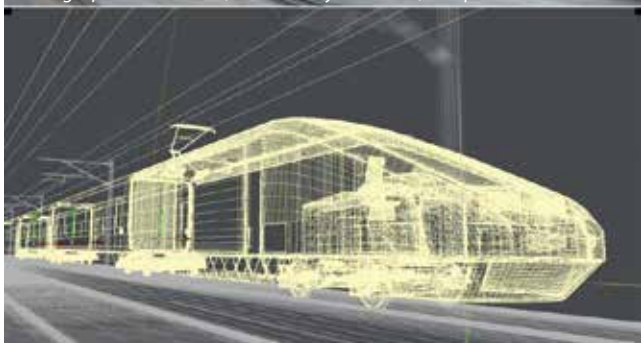
Preface

Expanding the tool-set

In the first *Change-mapping* book we set out to show what *Change-mapping* is and what it can do for organisations. But it was a balance between too complex and too simple. We decided to split the material into three books, one purely about how to learn the basics, one about the tools and one about more complicated uses of *Change-mapping*. This book introduces nineteen new tools which extend the power of *Change-mapping* while still being easy to use. We wanted to show the tools in action, so we chose a set of scenarios which give a good sense of when and how to use each tool. Each page-spread uses a real world example as well as clear instructions about how to use the tool. Another aim was to show how other tools such as **GANTT** charts can be used with *Change-mapping*, so there is a small section which shows some of these tools in use. For each scenario we have illustrations created for this book, which help keep the tools grounded in the real world, as the ultimate aim of this book is to provide tools to help explore and resolve real world issues.



Photograph source: Flickr, Mike McBey. CGI Train, Joseph Chittenden



Tom Graves
Bendigo, Australia
March 2021

A big thank you!

To our co-creators and valued patrons

This book would not have existed without all of the people who over the years have helped to bring *Change-mapping* to a wider audience.

The author would like to thank, amongst others:

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Helena Read (Australia)

Patrons

The author would also like to thank all the valued Patrons at www.patreon.com/tetradian who helped fund the production of this book.

They have also given excellent feedback and helped with testing the materials.

How you can get involved!

To find out more about *Change-mapping* visit: www.changemappingbook.com.

www.changemappingbook.com

If you would like to be involved with the development of new tools, testing and more then head over to Patreon to get involved.

www.patreon.com/tetradian

About the author

Tom Graves

Tom is known as a highly innovative thought leader on the futures of business. With a keen eye for systems and structure, he has nearly 40 years experience in knowledge management, skills research and software development.

He is a prolific author, and experienced presenter on radio and television, at conferences and in workshops and seminars.

Contact: info@tetradian.com



About the designer

Joseph Chittenden

Joseph has produced concepts and visuals for companies such as: *Tesco, Lotus sports cars, T-Mobile, Honda, Makita, UK Cabinet Office, Superdrug/3Phones*, and others on behalf of design agencies in England and Dubai.

www.jc3dvis.co.uk



What is Change-mapping?

A quick overview

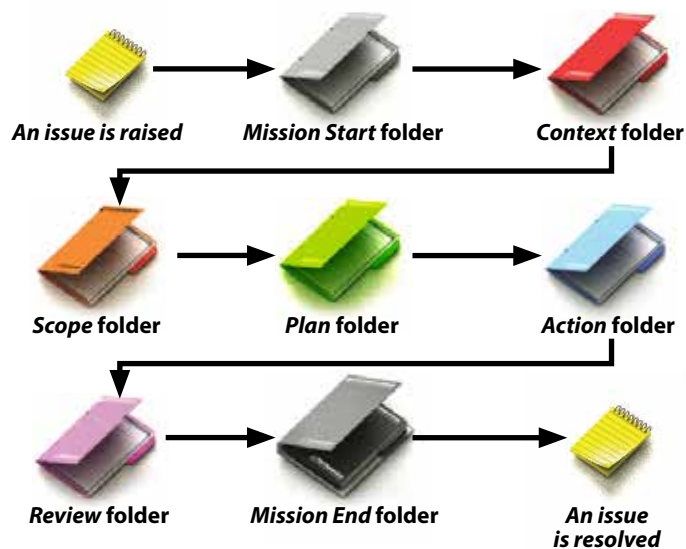


The first Change-mapping book

Inside the first book you learn how to run *Change-mapping* missions, see it in action, avoid common problems and how to run larger and more complex missions. There is also a complete set of basic tools to help you learn how to use *Change-mapping*. It is available on Amazon and other book retailers. ISBN 978-1-906681-40-1

This book is the follow-on to the *Change-mapping* book (see left). It is recommended to have read that book before reading this one.

What happens if you have an issue which needs to be resolved? A typical response is to plan how to resolve the issue and then resolve it. While this is fine in principle, it can miss out vital steps, such as 'Why does the issue need solving?' or 'Is this the best way to resolve the issue?' *Change-mapping* is used to answer these types of questions. It does this by using a simple map system which breaks down any issue into manageable parts, as shown below.



All these parts make up a **mission** to explore or resolve an issue. Every **mission** is run by a small team who are assisted by a **Pathfinder** who keeps the mission on track and an **Observer** who records all that is found.

When running a **mission** the team use tools to gather ideas, information and insights. How the tools work is discussed on the next page.

What is a Change-mapping tool?

Gathering ideas, information and insights

Within the first *Change-mapping* book was a set of basic tools which were deliberately simplified, so that you would not be daunted when first learning how to use them.

Once you became familiar with how the tools worked, then you would want to tackle more complex issues. There the basic tools would show their limits and the need for more sophisticated tools would be highlighted.

This book introduces twenty new *Change-mapping* tools which significantly expand *Change-mapping's* capabilities. The new tools are split into seven **Context folder** tools, eight **Scope folder** tools and four **Plan folder** tools. These tools are used within their respective folders in the same way as for the basic tools. For example you might use the **Value** tool (see page 6) in the **Context** folder.



Scenarios allow you to see how the tool would typically be used. For example the **Value** tool is shown being used to value ancient Chinese statues. Note though that any tool can be used within any scenario. For example the **Value** tool could be used to find out what is valued when moving copper mine trucks in Namibia (see page 82). So read through the scenarios to see what the tools are used for and then use them in your missions!

What is an enterprise?

The word 'enterprise' is mentioned throughout this book.

An organisation is *part* of an enterprise but it is not *the* enterprise.

If we imagine a copper mine, their enterprise is to mine copper. Mining the copper involves a huge amount of individual issues which need to be resolved.

This continual resolving of issues *is* the enterprise.

Inside the enterprise will be the organisation, suppliers, customers, equipment and much more.

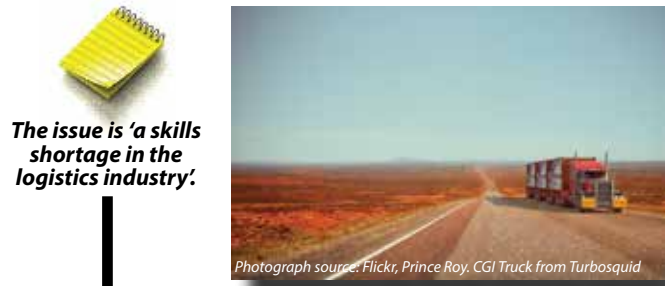
For more information see www.slideshare.net/tetradian/the-enterprise-is-the-story/



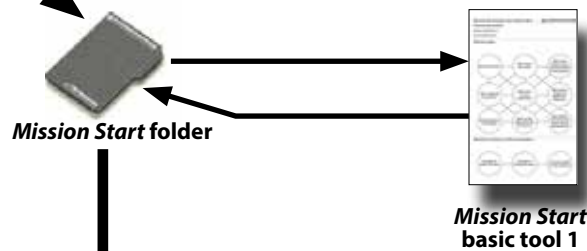
A brief guide to using the new tools

A simple scenario showing some of the new tools in action

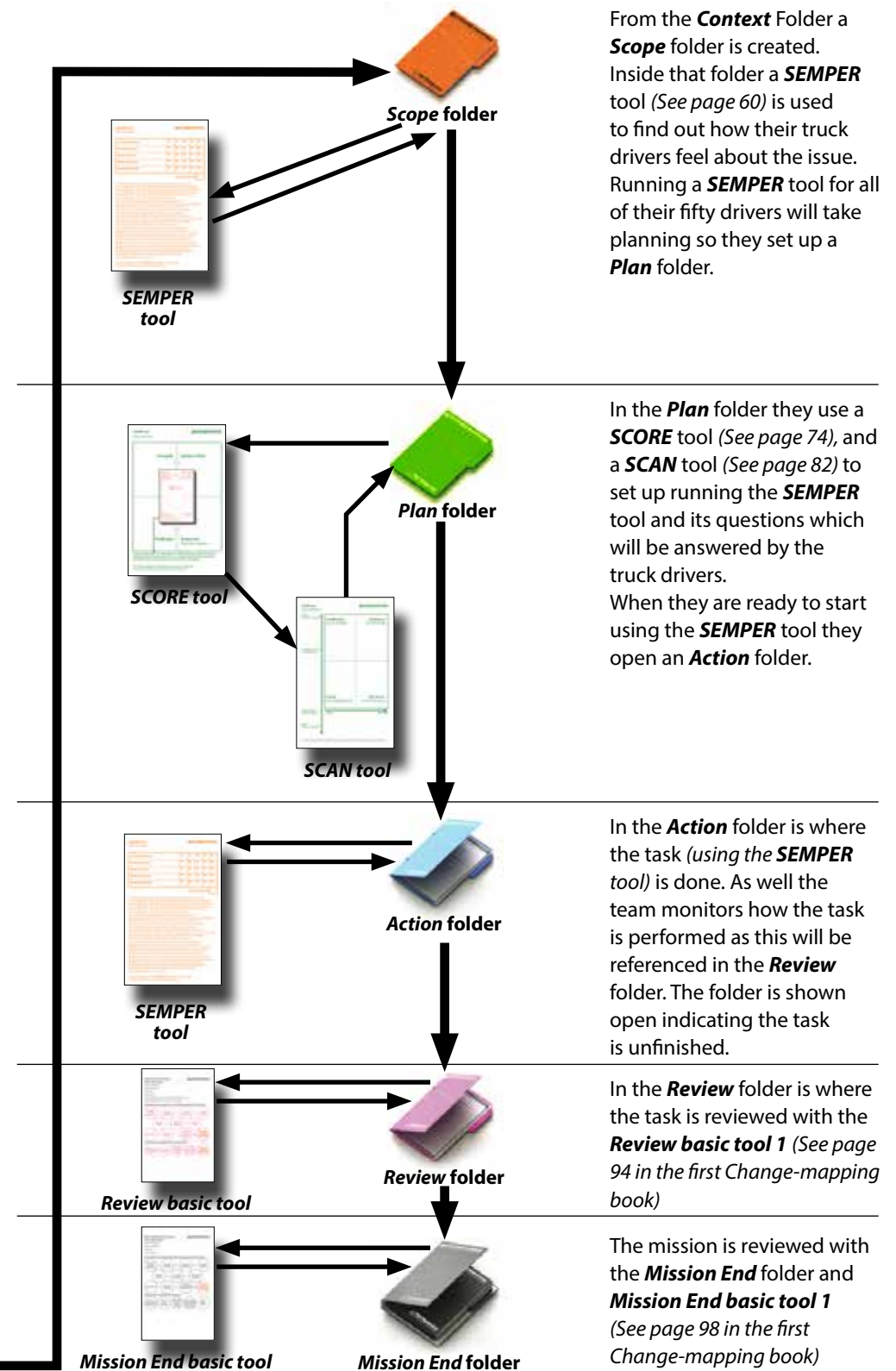
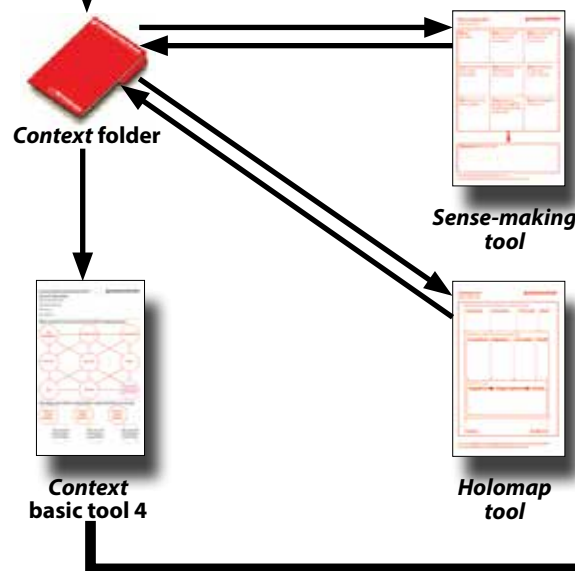
In this scenario a skills shortage issue has been raised by truck drivers, and articles on the internet. So an Australian logistics company decides to find out **why** there is a skills shortage **before** trying to change the situation.



The company used the **Mission Start** folder to set up the mission. The first tool used was the **Mission Start basic tool 1** (See page 64 in the first Change-mapping book) to establish **which** issue would be explored. Once a team was set up then they used the **Context** folder. The folder is closed to show when it is completed.



In the **Context** folder the team used the **Sense-making** tool (See page 10) to find out more about the issue. From a brief look on the internet they find that many of the truckers are due to retire and the tough working conditions are not attracting new recruits. They also use the **Holomap** tool (See page 22) to understand who are the stakeholders affected by the issue. They use the **Context basic tool 4** (See page 64 in the first Change-mapping book) to decide what to do next.



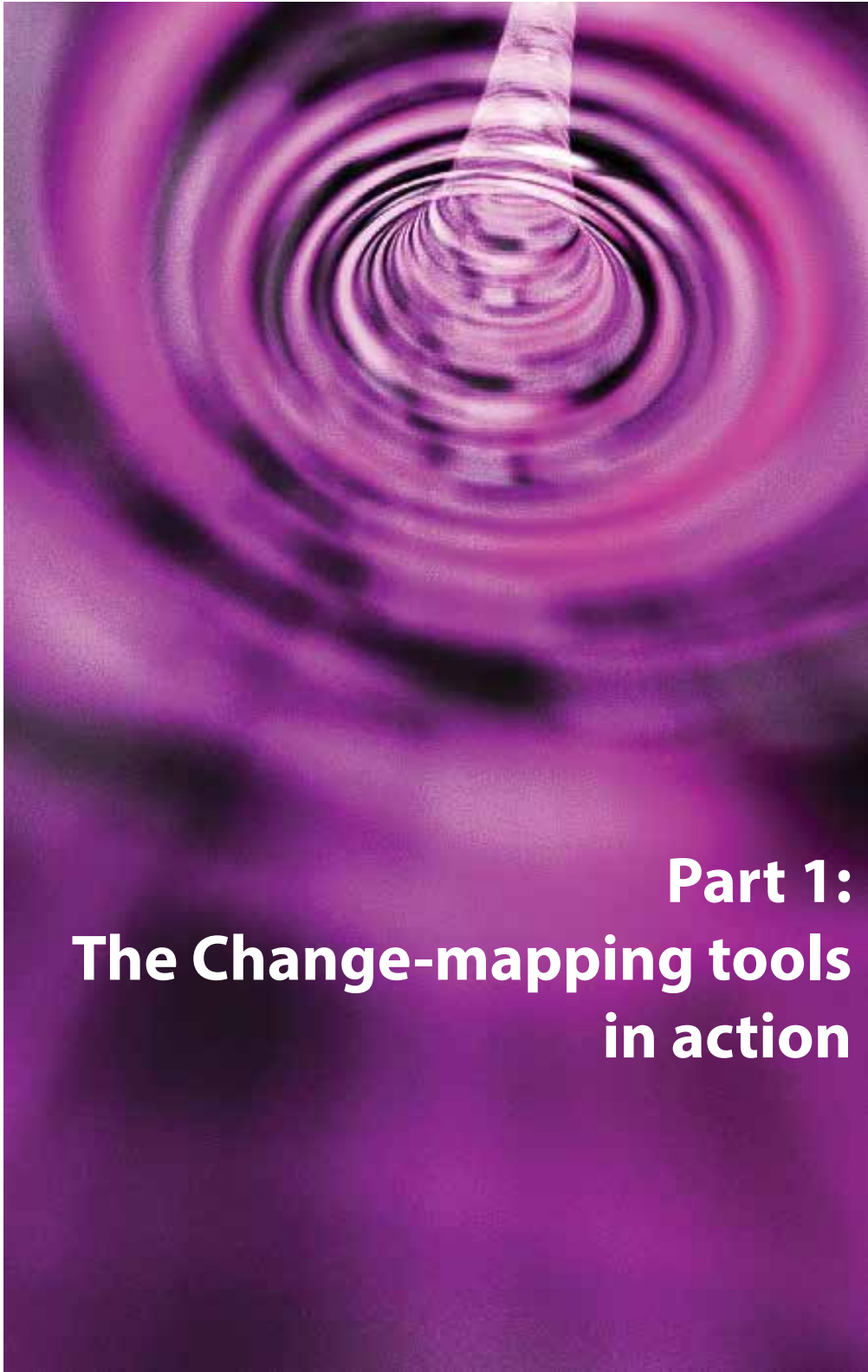
From the **Context** Folder a **Scope** folder is created. Inside that folder a **SEMPER** tool (See page 60) is used to find out how their truck drivers feel about the issue. Running a **SEMPER** tool for all of their fifty drivers will take planning so they set up a **Plan** folder.

In the **Plan** folder they use a **SCORE** tool (See page 74), and a **SCAN** tool (See page 82) to set up running the **SEMPER** tool and its questions which will be answered by the truck drivers. When they are ready to start using the **SEMPER** tool they open an **Action** folder.

In the **Action** folder is where the task (using the **SEMPER** tool) is done. As well the team monitors how the task is performed as this will be referenced in the **Review** folder. The folder is shown open indicating the task is unfinished.

In the **Review** folder is where the task is reviewed with the **Review basic tool 1** (See page 94 in the first Change-mapping book)

The mission is reviewed with the **Mission End** folder and **Mission End basic tool 1** (See page 98 in the first Change-mapping book)



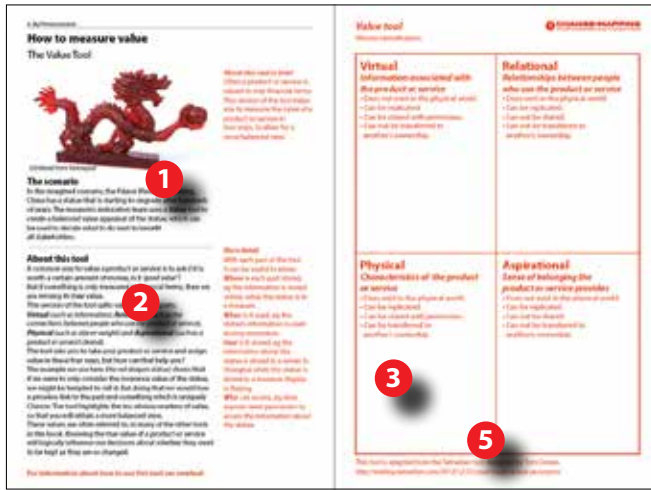
**Part 1:
The Change-mapping tools
in action**

Chapter 1: Big Picture scenarios

Context folder tools in action

NOTE

All the scenarios are hypothetical and fiction. The organisations mentioned are used to illustrate a specific issue to better describe how the tools could be used.



About these tools

In this chapter we look at tools used to explore the context of an issue or enterprise.

In the first *Change-mapping* book a simple **Context** tool was used, here we look at seven new **Context** tools. These tools allow much more context information to be found.

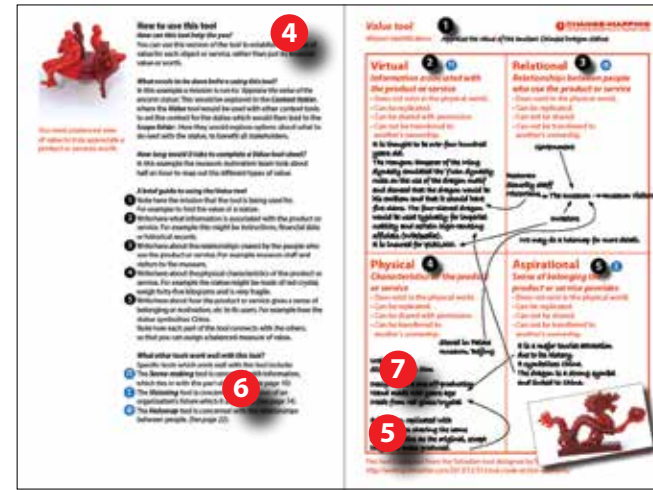
The tools in this chapter are used to:

- Measure the value of a product or service.
- Establish strategies for making sense of an unknown issue.
- Define an organisation's future.
- Map an organisation's services.
- Map the stakeholders within an issue.
- Guide how an organisation resolves issues.
- Understand an organisation's service cycle.
- Look at issues from a long term perspective.

The scenarios

In order to show how these new **Context** tools work, we have created seven scenarios. Each scenario has a real world issue which uses one of the tools to explore, address or resolve the issue.

It is important to note that any of the tools could be used in any scenario and are not limited to only being used within that specific scenario.



How to use this chapter

How can these tools help you?

These tools are used to explore the context (or big-picture) of an issue or enterprise. This will be vital when resolving issues by fully understanding the 'why' of an issue.

What needs to be done before using these tools?

You should read the first *Change-mapping* book, as this will show you how everything works and how to add more detailed tools, such as the ones shown in this chapter.

A brief guide to using this chapter

Each tool is discussed over four pages

- 1 A scenario showing the *Change-mapping* tool in use exploring a real world issue.
- 2 A general description of the tool discussing when and what it is used for.
- 3 A blank version of the tool which can be copied and used in your own *Change-mapping* missions.
- 4 Instructions showing how to use each tool including what needs to be done *before* using the tool.
- 5 A link to where you can find out more information online about the tool.
- 6 A list of other tools in the book which work well with the tool shown.
- 7 A filled-in example of the tool which uses the scenario to help you understand how to use the tool.

Using these tools in a Change-mapping mission



1. Set up a mission to explore or resolve an issue, with a **Mission start folder**.

2. Use a **Context folder** to explore the context of the issue. If the basic Context folder doesn't generate enough information, add one of the tools from this chapter, which best fits your requirements.



3. If the tool generates enough information then move to the **Scope folder**.

How to measure value

The Value Tool



CGI Model from Turbosquid

The scenario

In this imagined scenario, the Palace Museum in Beijing, China has a statue that is starting to degrade after hundreds of years. The museum's restoration team uses a **Value** tool to create a balanced value appraisal of the statue, which can be used to decide what to do next to benefit all stakeholders.

About this tool

A common way to value a product or service is to ask if it is worth a certain amount of money, is it 'good value'? But if something is only measured in financial terms, then we are missing its **true** value.

This version of the tool splits value into four parts:

Virtual (such as information), **Relational** (such as the connections between people who use the product or service), **Physical** (such as size or weight) and **Aspirational** (such as a product or service's brand).

The tool asks you to take your product or service and assign value in these four ways, but how can that help you?

The example we use here (*the red dragon statue*) shows that if we were to only consider the insurance value of the statue, we might be tempted to sell it. But doing that we would lose a priceless link to the past and something which is uniquely *Chinese*. The tool highlights the *less obvious* markers of value, so that you will obtain a more balanced view.

These values are often referred to, in many of the other tools in this book. Knowing the true value of a product or service will logically influence our decisions about whether they need to be kept as they are or changed.

About this tool in brief

Often a product or service is valued in only financial terms. This version of the tool helps you to measure the value of a product or service in four ways, to allow for a more balanced view.

More detail

With each part of the tool it can be useful to know:

Where is each part stored, eg the information is stored online, while the statue is in a museum.

When is it used, eg the statue's information is used during restoration.

How is it stored, eg the information about the statue is stored in a server in Shanghai while the statue is stored in a museum display in Beijing.

Who can access, eg does anyone need permission to access the information about the statue.

Value tool

Mission identification:

Virtual

Information associated with the product or service

- Does not exist in the physical world.
- Can be replicated.
- Can be shared with permission.
- Can not be transferred to another's ownership.

Relational

Relationships between people who use the product or service

- Does exist in the physical world.
- Can be replicated.
- Can not be shared.
- Can not be transferred to another's ownership.

Physical

Characteristics of the product or service

- Does exist in the physical world.
- Can be replicated.
- Can be shared with permission.
- Can be transferred to another's ownership.

Aspirational

Sense of belonging the product or service provides

- Does not exist in the physical world.
- Can be replicated.
- Can not be shared.
- Can not be transferred to another's ownership.



You need a balanced view of value to truly appreciate a product or service's worth.

How to use this tool

How can this tool help you?

You can use this version of the tool to establish four types of value for each object or service, rather than just its financial value or worth.

What needs to be done before using this tool?

In this example a mission is run to: 'Appraise the value of the ancient statue'. This would be explored in the **Context folder**, where the **Value** tool would be used with other context tools to set the context for the statue which would then lead to the **Scope folder**. Here they would explore options about what to do next with the statue, to benefit all stakeholders.

How long would it take to complete a Value tool-sheet?

In this example the museum restoration team took about half an hour to map out the different types of value.

A brief guide to using the Value tool

- 1 Note here the mission that the tool is being used for. For example to find the value of a statue.
- 2 Write here what information is associated with the product or service. For example this might be instructions, financial data or historical records.
- 3 Write here about the relationships shared by the people who use the product or service. For example museum staff and visitors to the museum.
- 4 Write here about the physical characteristics of the product or service. For example the statue might be made of red crystal, weigh forty-five kilograms and is very fragile.
- 5 Write here about how the product or service gives a sense of belonging or motivation, etc to its users. For example how the statue symbolises China.
Note how each part of the tool connects with the others, so that you can assign a balanced measure of value.

What other tools work well with this tool?

Specific tools which work well with this tool include:

- Π The **Sense-making** tool is concerned with information, which ties in with this part of the tool. (See page 10).
- Σ The **Visioning** tool is concerned with a vision of an organisation's future which it aspires to. (See page 14).
- Φ The **Holomap** tool is concerned with the relationships between people. (See page 22).

Value tool

1

Mission identification: Appraise the value of the ancient Chinese Dragon statue

Virtual 2 Π

Information associated with the product or service

- Does not exist in the physical world.
- Can be replicated.
- Can be shared with permission.
- Can not be transferred to another's ownership.

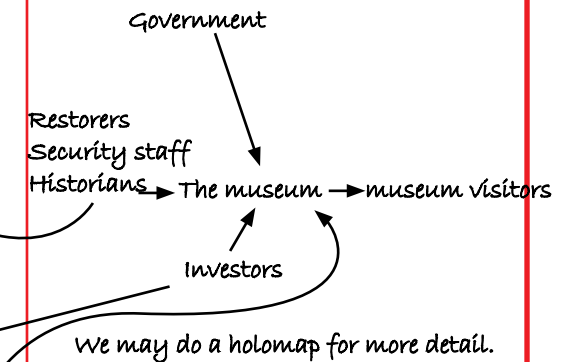
It is thought to be over four hundred years old.

The Hongwu Emperor of the Ming dynasty emulated the Yuan dynasty rules on the use of the dragon motif and decreed that the dragon would be his emblem and that it should have five claws. The four-clawed dragon would be used typically for imperial nobility and certain high-ranking officials. (Wikipedia).
It is insured for ¥180,000.

Relational 3 Φ

Relationships between people who use the product or service

- Does exist in the physical world.
- Can be replicated.
- Can not be shared.
- Can not be transferred to another's ownership.



Physical 4

Characteristics of the product or service

- Does exist in the physical world.
- Can be replicated.
- Can be shared with permission.
- Can be transferred to another's ownership.

Stored in Palace museum, Beijing

Weight 45kg
Size 20 x 45 x 5cm

Designed as a one off-production
Hand made 400 years ago
Made from red glass/crystal

It has been replicated with many copies sharing the same characteristics as the original, except they were mass produced.

Aspirational 5 Σ

Sense of belonging the product or service provides

- Does not exist in the physical world.
- Can be replicated.
- Can not be shared.
- Can not be transferred to another's ownership.

It is a major tourist attraction due to its history.
It symbolises China.
The dragon is a strong symbol and linked to China.

