



Strategic Planning for Success

*Aligning People, Performance,
and Payoffs*

Roger Kaufman
Hugh Oakley-Browne
Ryan Watkins
Doug Leigh

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CONTENTS

List of Tables and Figures xiii

Preface xix

Introduction 1

1 BUSTING OLD PARADIGMS AND USING NEW ONES: DEFINING AND SHAPING OUR FUTURE 4

Chapter Goals 4

Today's Paradigms 5

The New Realities 16

Ignoring the New Realities 18

Paradigms That Work 25

Create a Better Future 27

Summary 34

2 CRITICAL SUCCESS FACTORS FOR STRATEGIC THINKING THAT WORKS 39

Chapter Goals 39

Six Critical Success Factors for Strategic Thinking and Planning 40

Is Change Strategic?	42
The Strategic Thinking and Planning Process	44
The Consequences of Ignoring the Critical Success Factors	51
3 SYSTEM (AND SYSTEMS) THINKING	57
Chapter Goals	57
The Organizational Elements Model	58
Defining the Organizational Elements	64
The Organizational Elements Describe a System	72
The Organizational Elements—Useful Applications	79
Planning from a Helicopter vs. Planning from the Ground	79
4 PREPARING TO PLAN: ENSURING YOU DO THE RIGHT THING AND NOT SIMPLY DO THINGS RIGHT	81
Chapter Goals	81
The Strategic Planning Process	84
Preparing to Plan	89
Mega Level Visioning: Committing to the Longest View	96
Assessing Resistance to Change	102
Barriers—Common Mistakes Made by Strategic Planners	103
5 ASSESSING NEEDS: DEFINING THE CRITICAL GAPS IN RESULTS . . . AND PUTTING THEM IN PRIORITY ORDER	111
Chapter Goals	111
Needs Assessment or Wants Assessment?	112
Defining Needs and Wants	113
Needs Assessment Benefits	123
The Organizational Elements	126

The Needs Assessment Process 131

Gathering the Data 138

Data Gathering Methods 143

Selecting Priority Needs 152

Will the Needs Assessment Work? 154

6 SOLVING PROBLEMS: CLOSING THE PRIORITY GAPS 158

Chapter Goals 158

Solving Problems—An Overview 159

Two Common Problem Solving Errors 164

Errors in Formulating the Problem 165

Simple Problem Solving 167

Complex Problem Solving 173

7 DEVELOPING SMARTER OBJECTIVES: THINKING AUDACIOUSLY, BEING AUDACIOUS, DELIVERING HIGH PAYOFF RESULTS 187

Chapter Goals 187

Why Objectives? 188

Categories of Objectives 193

“Smarter” Criteria for High Impact Objectives 194

Identify Key Result Areas 203

Select Performance Indicators 207

Detecting Non-Smarter Objectives 213

Develop Mission Objectives 218

Summary 221

8 CREATING CHANGE: MAKING SURE THE CHANGE EFFORT REALLY BROUGHT ABOUT CHANGE 224

Chapter Goals 224

Creating and Managing the Change from Present Results
to Desired Results 225

Transition Management Plan 226

The Paradox of Building Commitment Through Pain 231

Define Key Roles for Change 234

Develop Sponsorship 241

Preparing Change Agents and Advocates 244

Managing Resistance Effectively 247

Force Field Analysis 250

9 SCOPING AND SCANNING THE ORGANIZATION: WHAT MEANS WILL ACHIEVE THE HIGH PAYOFF RESULTS 257

Chapter Goals 257

Scoping and Scanning 258

SWOT Analysis 259

Analyzing the Business Logic 271

The Relationships Among the Business Logics 284

The Cultural Screen 286

10 DELIVERING HIGH PAYOFF RESULTS 308

High Payoff Results 310

Fourteen Steps to Useful Results and Performance 319

A General Problem Solving Process Model 327

Avoiding Success 328

Summary 330

APPENDIX A: PARADIGM SHIFT FOR TEACHING/LEARNING 331

APPENDIX B: A GLOSSARY AND CLASSIFICATION OF TERMS AND TOOLS 341

**APPENDIX C: A SUGGESTED CODE OF PROFESSIONAL CONDUCT FOR DEFINING
AND DELIVERING HIGH PAYOFF RESULTS 355**

References 363

Index 373

About the Authors 383

About the International Society for Performance Improvement 387



LIST OF TABLES AND FIGURES

Table 1.1	Early Futurists and Their Landmark Works	5
Table 1.2	Why Paradigms Shift	10
Table 1.3	Fads Checklist	13
Table 1.4	Implications of Ignoring the New Realities	19
Table 1.5	Implications of Ignoring the New Realities in Your Organization	24
Table 1.6	Traditional Planning vs. the High Payoff Results-Oriented Paradigm	29
Table 1.7	Checking Whether Organizations Care	32
Figure 1.1	Progression from Mega to Inputs	36
Table 2.1	Six Critical Success Factors	40
Table 2.2	Checklist for Assessing Strategic Change	42
Figure 2.1	The New Paradigm	45
Figure 2.2	Current Results to Desired Results	46
Table 2.3	Ends Achieved at the Mega, Micro, and Macro Levels	47
Figure 2.3	The Chain of Results	48

Table 2.4	Self-Assessment	50
Table 2.5	Determining the Implications for Your Organization	54
Table 2.6	Decision Chart	55
Figure 3.1	Functional Silos or Stovepipes	61
Table 3.1	Heaps vs. Systems	62
Figure 3.2	Traditional Organizational Chart	63
Figure 3.3	The Organizational Elements Model	64
Table 3.2	Three Levels of Results	65
Figure 3.4	Rolling Down from Mega and Up to Align Resources, Means and Methods, Operational, Organizational, then Societal Results	66
Table 3.3	Internal and External Influences	67
Table 3.4	Examples of Processes	67
Figure 3.5	Jumping to Conclusions	70
Table 3.5	Types of Customers and Results	71
Figure 3.6	Interactions Among Organizational Elements	72
Table 3.6	Sample Application of OE Model	73
Table 3.7	“What Is” Exercise	74
Table 3.8	Descriptors and Examples	75
Figure 4.1	The Strategic Planning Process	85
Table 4.1	Formal Strategic Planning Readiness Assessment	88
Table 4.2	Scoring and Interpretation Sheet for Readiness Assessment	89
Table 4.3	Checklist for Preparing to Plan	90
Table 4.4	Three Planning Levels	91
Table 4.5	How to Discriminate the Planning Level	93
Figure 4.2	Categories of Clients (They Are Best Linked)	94
Table 4.6	Planning Levels	98
Table 4.7	Assessing Your Paradigm	98

Table 4.A	Addressing Levels of Planning: You and Your Organization	100
Table 4.B	Addressing Levels of Planning: Other Organizations	100
Table 4.8	Assessing Resistance to Change	103
Table 4.9	Common Mistakes	104
Table 4.10	Questions by Level of Result	107
Table 5.1	Levels of Need	113
Figure 5.1	Gap Between Current and Desired Results	114
Table 5.2	Confusing Wants and Needs	114
Table 5.3	What Are the Actual Needs?	115
Table 5.4	Different Questions to Ask	117
Table 5.5	Differentiating Needs from Wants	119
Table 5.6	Answers to Exercise	120
Table 5.7	Assessing the Benefits of Needs Assessments	127
Figure 5.2	From Present to Desired Results	128
Table 5.8	Fuzzy vs. Useful Examples	129
Table 5.9	Three Levels of Needs Assessment	130
Figure 5.3	Relating and Rolling Down Needs Assessment by Level	131
Figure 5.4	The SOCER Model	132
Table 5.10	Comparing Needs Assessments by Level	136
Table 5.11	Applying the Model to Quasi Needs Assessments	137
Table 5.12	Essential Questions	142
Table 5.13	Observation Advantages and Disadvantages	144
Table 5.14	Rating Scale for Group Interview	146
Table 5.15	Pros and Cons of Document Searches	147
Table 5.16	System Approach Tools	151
Table 5.17	Needs Assessment Checklist	154
Table 5.18	Format for Recording Needs	155

Table 5.19	Recording Needs Assessment Data and Possible Solutions	156
Figure 6.1	Needs Link What Is with What Should Be	159
Figure 6.2	The Six-Step Problem Solving Process	161
Figure 6.3	Flow Chart for Screening Problems	163
Table 6.1	Checking the Problem Formulation	166
Table 6.2	Simple Problem Solving Worksheet	172
Figure 6.4	Key Steps in Complex Problem Solving	173
Table 6.3	Assessment Checklist	182
Table 7.1	Gilbert's Six Factors of Performance	190
Table 7.2	Three Types of Results	194
Table 7.3	SMARTER Objectives	195
Table 7.4	Specificity Examples	196
Table 7.5	Four Scales of Measurement	196
Table 7.6	Examples of Goals and Objectives	197
Table 7.7	Some Audacious Examples	198
Table 7.8	Indicators of Well-Stated, Measurable Results	202
Table 7.9	Key Result Classifications	204
Table 7.10	Checking Your Key Results	205
Table 7.11	Rating Your Key Result Areas	206
Figure 7.1	Process for Deriving Objectives	208
Table 7.12	Performance Indicators by Level of Result	210
Table 7.13	Matching Key Results with SMARTER Objectives	212
Table 7.14	Detecting Non-SMARTER Objectives	213
Table 7.15	Feedback Sheet	215
Figure 7.2	Relating and Rolling Down Needs from Mega to Macro to Micro	218
Table 7.16	Key Results and SMARTER Objectives	220

Figure 8.1	The Change Process	227
Table 8.1	Assessing Community Initiatives	230
Table 8.2	Critical Mass	233
Figure 8.2	Relationships Among Sponsor, Change Agent, and Target	235
Figure 8.3	Linear Relationship	236
Figure 8.4	Triangular Relationship	236
Figure 8.5	Square Relationship	236
Table 8.3	Identifying Roles	237
Table 8.4	Sponsor Commitment Assessment	239
Table 8.5	Range of Responses	240
Table 8.6	Assessing Capacity to Change	243
Table 8.7	Competency Assessment for Change Agents and Advocates	246
Figure 8.6	Force Field Analysis	251
Table 8.8	Force Field Analysis Form	254
Table 9.1	Comparison of Scoping and Scanning Methods	260
Table 9.2	Quick Process Analysis	265
Figure 9.1	Balancing Processes and Results	267
Table 9.3	Sample Recording Device for a SWOT Analysis	268
Table 9.4	Sample Rating Code	269
Figure 9.2	Responses to External Opportunities and Threats	273
Table 9.5	Changing Your Planning Logic	275
Table 9.6	Customer Logic Assessment	277
Table 9.7	Assessing Your Economic Logic	280
Table 9.8	Assessing Structural Logic	283
Table 9.9	Desired Changes to Business Logics	285
Figure 9.3	Relationships Among the Business Logics	286

Figure 9.4	The Strategy/Tactics Path	288
Figure 9.5	The Cultural Path	289
Figure 9.6	Intermingled Paths	290
Figure 9.7	Rules and Policies	291
Figure 9.8	Communicating and Relating	294
Table 9.10	Cultural Screen Exercise	298
Table 9.11	Cultural Screen Checklist	300
Figure 10.1	The OEM as a Framework for Needs Assessment	309
Table 10.1	Six Critical Success Factors	309
Figure 10.2	A Process for Identifying and Resolving Problems	310
Figure 10.3	Aligning All Elements of an Organization	311
Figure 10.4	A Systems Approach vs. a System Approach	312
Table 10.2	Frameworks for Plans in Common Use Today	313
Figure 10.5	Upward/Reactive and Downward/Proactive Decision Processes	315
Figure 10.6	OEM Links from Planning to Results	316
Figure 10.7	Fourteen Steps to Useful Results	320
Table A.1	Old vs. New Paradigm	332
Figure B.1	System Approach	342
Figure B.2	Systems Approach	342
Table C.1	Basic Questions to Be Asked and Answered	361



PREFACE

This book has several potential flaws, so beware.

The first is that it flies in the face of much conventional wisdom about how to go about performance improvement. Thus, some readers will feel uncomfortable about concepts and practical tools that are different from those that gave us the “greatness” of Enron, Global Crossing, Andersen, WorldCom, ImClone, airport security prior to September 11, 2001, government agencies that did not talk with each other and thus never gave anyone the chance to “connect the dots,” and single-minded executives and managers who focused narrowly on their patch and forgot the whole. There have been many organizations worldwide that did what was widely expected of them: forget about external clients and society and go for the quick (but not sustainable) profits. Performance improvement that stops at the quarterly profit-and-loss sheet or the next year’s budget is still popular but dangerous. This book shows why this is true, and how not to be one of the bodies heaped on others that followed the crowd and conventional advice and did what was acceptable and wrong.

The next potential flaw is that it is written by people who have both researched the bases for what is presented as well as practiced it. It is usual for researchers to be dismissed by the operational types, and for the operational types to be discounted by the academics doing research. All four of us

authors have played both sides of the street. And learned from it. We attempt to bring you the integration of research and practice here, perhaps satisfying no one.

A third potential flaw is that we provide lots of hands-on exercises and practical tools. And we have worked hard (and had many reviews) to try to make what we have written clear. Some people like scholarly looking texts with lots of philosophy, and others just want checklists and step-by-step guides. Rather (and perhaps to the satisfaction of no one), we take the time to provide the underlying concepts and the rationale for what we suggest, and only then we go to the trouble of giving you guides to define and deliver high impact results.

Finally, one more potential flaw of which to make you possibly be wary. We define words—common-sounding words such as “need,” “requirement,” “Outcome,” “Outputs,” “Product,” “evaluation,” “assessment”—in very precise and very limited ways. Rather than being like Alice in Wonderland, where words meant anything the user wanted them to mean, we take the time (perhaps too much time every once in a while) to define what we mean and why we make the distinctions. Tools that are not used properly, not used in the right context, and not used consistently will not build useful things. Rather than deal in “semantic quibbling,” we spend a lot of time to help you become rigorous—and successful—by not only doing things right (the conventional passion for process) but by doing the right things, by defining and delivering high impact results. Learning and applying what is here will not be easy or popular, but it will be useful.

In writing this book, we did not act alone, although the inevitable criticisms will find us to be intellectual orphans. We are ready to take the blame for everything here, while giving credit (and indemnity) to many people who have encouraged us, read and reviewed our work, given us feedback (often that we did not want to hear, but that we had to hear and consider), and who have directly and indirectly guided and cajoled us. Among those are:

- Ingrid Guerra of the University of Michigan–Dearborn, who provided thought, feedback, and research as she moved from graduate student to research project manager to assistant professor;
- Mariano Bernardez who, as a management consultant and e-learning guru, had the courage to apply these concepts and tools—and provide us with valuable performance data—to many organizations in Latin America, Europe, and the United States;
- Don Triner, Commander, U.S. Coast Guard, who studied and applied this in the operational world, where decisions have to be both immediate and right;

- Ben Wiant, performance consultant, who labored to make sure this would communicate to people who would buy and use this work;
- Bill Swart, Provost and Academic Vice Chancellor at East Carolina University, who worked with the authors of this book to make sure that it was practical and useful for engineers, businesses, and even universities;
- Several Australian public sector executives who used the basics of this, and provided performance data for its continuous improvement, including Peter Sharp, Peter Kennedy, Maj. General Roger Powell, Don Watts, Doug Hinchliffe, and a host of professionals who applied and learned with us;
- Clifton Chadwick, who has used this evolving model and tools almost worldwide, for his reviews and guidance;
- Ronald Forbes, tectonic plate physicist-turned-management consultant, who has thought through these concepts and tools, applied them, and helped us evolve what is here;
- Jane McCann and Carolyn Lane, who brought to us (along with co-author Hugh Oakley-Browne) the New Zealand reality based on their consulting; and
- Peter Drucker, who has been a guide and inspiration to those who would seek measurably useful results.

In addition, there are other contributors: Larry Lipsitz, publisher of *Educational Technology*, has encouraged (and critiqued) many of the concepts and tools here; the editors and publishers of other books leading up to this work (appropriately referenced) who have encouraged this development; Roger Addison, Roger Chevalier, Dale Brethower, and many International Society for Performance Improvement (ISPI) senior contributors who have encouraged this work and what is in this volume; Matt Davis, who first encouraged this book when he was still with ISPI; and the long line of long-suffering graduate students who not only learned this material but who have gone out to apply it.

This list is both incomplete and inadequate. There are many others who early and later connected with the power, pragmatism, and humanism of Mega Planning and these concepts for defining and delivering high impact results, including those in business, industry, government, and the military. We both apologize to those whom we admire and thank them; we are not allowed the luxury of the space to personally name each deserving one of them.

Finally, our thanks to you who are reading and who will apply what is in this book. We know it will work if it is used correctly and consistently. We thank you for your confidence and your professional determination to do both what is right as well as what is responsible.

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Strategic Planning for Success



Introduction

Welcome to *Strategic Planning for Success: Aligning People, Performance, and Payoffs*.

This is a practical and pragmatic book with cases-in-point, guides, job aids, and exercises. It is not overly theoretical, and yet it is based on firm research and successful applications worldwide.

It is a practical and proven guide for defining the concepts and tools of strategic thinking and planning that in turn provides you with the tools for defining the design and delivery of results that make a difference: high payoff¹ results. It provides some new realities for defining and delivering success to better ensure that disasters such as those at Enron, Global Crossing, Adelphia, HIH, Imclone, Tyco, and even Andersen will not afflict you and your organization. We don't preach, but rather provide the concepts and tools that allow you to say to any internal or external client, "We can deliver success . . . and prove it." Adding value to external clients, and proving it, is ethical and results in useful payoffs. As well as very, very practical. It will allow you to align people, performance, and high payoff results.

Are these concepts different from the standard strategic thinking and planning? You bet. Are they proven and practical? Yes again.

What we provide here is how to align your thinking and planning with high impact payoffs—results that will measurably add value to you, your organization, your external clients, and society. Yes, society. Society is where we all live

and to whom we are ultimately responsible. And to which we have to be responsive. As a guide, the 4-Way Test of Rotary International is useful:

- Is it the truth?
- Is it fair to all concerned?
- Will it build goodwill and better friendships?
- Will it be beneficial to all concerned?

These are good guides for business, government, and life. Especially the fourth one: Will it be beneficial to all concerned?

Because this book focuses on “front end alignment,” we don’t get into the tools and techniques for detailed performance subsystem design, development, implementation, and evaluation but simply give the requirements for the front end—to align what we do with what will be valuable to all stakeholders. There are ample sources for the design and development, many of which are published by Jossey-Bass and Jossey-Bass/Pfeiffer. We list some of them in the book. We recommend turning to these sources after, and only after, you define and align yourself and your organization with external value added.

A hallmark of this approach—and what makes it different—is that internal results must add value to external clients and society. High payoff results are those that will add value for an “entire results (and value added) chain” that flows from individual performance accomplishment to organizational and external/societal contributions.

High payoff/high impact² perspectives on success must also include significantly wider definitions of clients than are usually used today: society must be included and be top priority.

Society as primary client is both sensible and practical. Every day we all depend on other organizations, public and private, to put our safety, survival, and quality of life first on their agenda. We depend on all organizations with which we deal each and every day, such as airlines, public transport, cars, supermarkets, food processors, drug manufacturers, and energy suppliers, to assure that our safety and well-being will be first and foremost on their agenda. It is on ours. We take up that challenge, and encourage you to do the same by using what is in this book.

If you want to make a difference, in and for your organization as well as the society in which we all live, this book is written for you. Increasingly, organizations are both being asked and even asking themselves, “What value do we add?” This book is a guide for determining the answer, both in terms of how you define success and of how you measure it. The concepts and tools will work in your professional life as well as in your personal life. It is about success in

both the short term and long term, and thus it is the safest approach and most practical approach there is.

This book, then, is different from what is already on your shelf or in the latest “flavor of the month” promotions. There are many names for various conventional (and outmoded) planning approaches in use today, including: “strategic planning” (conventional), “strategic management,” “business planning,” “corporate planning,” “tactical planning,” and “operational planning.” We provide a framework for defining and linking what any organization uses, does, produces, and delivers to add value for all stakeholders. We help you define success and then prove it. We have used it and improved it in applications almost worldwide. It is based on what has worked in just about every kind of organization that exists.

BUT FIRST A WORD ON SEMANTICS

Let us give you a “heads-up” in advance.

We are going to make some seemingly, at least at first, “fine” distinctions among words and concepts, such as differences between a *system* and a *systems* approach, and differences between *products*, *outputs*, and *outcomes*. We are not trying to be difficult or annoying in an attempt to find trivial differences to distinguish ourselves from others. (See Appendix B for a glossary and classification of terms and tools.)

Rather, we are defining concepts and tools that will help you be successful because much damage and many false starts happen from popular-but-fuzzy thinking and nebulous definitions. We go past the conventional and non-functional vocabulary plaguing management and performance improvement today . . . the popular vocabulary is convenient but will not serve you well. We take the time to define each word and concept so that you are not “flying” on conventional wisdom and old paradigm understandings.

We make these distinctions to help you be successful. Confusing words, terms, and concepts can be a terminal affliction. Please be patient, and please put aside your current definitions and understandings of these terms. New, precise, rigorous, and robust definitions will definitely serve you well.

OK? Let’s go.

Notes

1. Payoffs are consequences. They can be both positive and aversive.
2. We actually use “impact” and “payoffs” interchangeably.



CHAPTER ONE



Busting Old Paradigms and Using New Ones

Defining and Shaping Our Future



CHAPTER GOALS

By working through this chapter, you will be able to answer the following questions:

- ☐ What is a paradigm? Why and when is it useful?
- ☐ What are the limitations of a paradigm?
- ☐ What are frames?
- ☐ What are mental models?
- ☐ What are paradigm shifts?
- ☐ What are the frequent fads?
- ☐ What are the causes of fadaholism?
- ☐ What are some of the new realities (new paradigms and “ground rules”) impacting organizations?
- ☐ What is a Strategic Thinking and Planning paradigm that works?
- ☐ Why can’t we continue on the way we are?
- ☐ Who should care about creating a better shared future?