

Clarifying and Exploring an Organizational Challenge



Whole People, Whole Leaders
Seeing Things Whole

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WORKSHEET TO DEVELOP A FOCUS DILEMMA

The purpose of this workbook is to enable you to begin to view your organization and an issue or challenge facing it in the largest possible context. Exploring a challenge, identifying important related information and identifying some of the tensions around the issue (including ethical or values tensions) serves as a starting place for seeing your organization whole.

We have heard from leadership teams who have used this workbook as a guide for identifying and exploring a challenge that the resulting exercise is both demanding and time consuming, an exploration that requires a significant investment on their part. And that this effort has reliably been worth the investment, resulting in a more thoughtful understanding of the issue they have explored and of their organization as a whole.

The workbook is also designed to help you identify and organize information that will be helpful in presenting the resulting “focus challenge” to others you may invite to think with you about the issue.

As the process unfolds, you will probably find yourself wanting to amend your original articulation of the focus challenge, so don't feel that you must come up with a "carved in stone" statement of the issue at the outset. A good statement of the focus dilemma does have certain attributes and later in the worksheet we will invite you to check your statement against several criteria. At the outset, however, don't worry too much about "getting it right".



STEP ONE: Clarifying Your Current Situation

A. For starters, take a few minutes to describe a dilemma you are personally facing in your organization at this time that doesn't have any obvious solution. What values do you experience as being in tension around this conflict?

B. Now do the same with a sub-unit (department, office, task force, Board of Trustees, etc.) within the organization with which you are involved. Again, in addition to naming the problem, also identify the legitimate values that appear to be in tension.

C. And finally, identify a dilemma that currently confronts the whole organization, the resolution of which is unclear but which will have a major impact on the future viability of your organization. As before, identify the values that appear to be in conflict around this dilemma.

A. PERSONAL

B. TEAM OR DEPARTMENT

C. ORGANIZATION



STEP TWO: Developing the dilemma as a goal statement

Look back over your three descriptive statements (your personal dilemma, a dilemma facing your department or unit, and a dilemma or problem facing the organization as a whole) and see if there is any connection. Now describe again the dilemma facing your organization, framing it this time as a "How to ..." goal statement similar to the illustration below.

As an example, Landry Cycle, an innovative bicycle company in New England, wanted to grow. In fact, it felt it had to grow in order to survive given what was happening in the industry at large. But Landry had developed a unique staff culture oriented to the service of clients and not simply to "making a sale." Rapid growth threatened to undermine the culture and destroy what had made the company so attractive to its customers. Thus the dilemma the CEO framed for the reflection process was:

How to achieve profitability adequate to enable growth (value: financial sustainability) over the next two years and sufficient to sustain Landry's culture (value: customer as honored guest)?

HOW TO



STEP THREE: Indicators and Worries

Next, as a way to further elaborate on the challenge facing your organization, in the space to the right, take a moment to make note of couple of kinds of things.

1. **Indicators:** full-blown or emerging problems you observe in your organization that are indicators of this challenge in your organization. *What do you notice that tells you that this really is a problem your organization should address.*
2. **Possible Negative Consequences:** ways that your organization may be negatively impacted should you fail to successfully address the challenge you have identified. *What do you worry may happen if you're not success in your attempts to engage this challenge?*

Revisit your dilemma statement in light of these *indicators* and *potential negative consequences*. In light of these things, are there any changes you wish to make to sharpen or clarify your statement of the dilemma facing your organization? If so, enter it to the right.

INDICATORS AND POTENTIAL NEGATIVE CONSEQUENCES

1.

2.

3.

4.

5.

HOW TO



STEP FOUR: Identifying Desired Outcomes

Next, as a way to further reflect upon the dilemma facing your organization, imagine what things would look like if your dilemma were satisfactorily addressed. What would the organization look like or do in this case? For example, if a reporter were to do a story on your organization after the dilemma had been addressed, what would they see and write about? What would have changed, and how is the organization different as a result of this change? Take a moment to identify and write down those desired outcomes.

Revisit your dilemma statement in light of the *desired outcomes*. In light of these things, are there any changes you wish to make to sharpen or clarify your statement of the dilemma facing your organization? If so, enter it to the right.

DESIRED OUTCOMES

1.

2.

3.

4.

HOW TO



STEP FIVE: Force Field Analysis

In the previous step, you were invited to describe some elements of a desired outcome to the challenge you identified.

In this step, as a way of gathering additional information about the challenge, you will be invited to do a force field analysis in which you identify a variety of factors (forces) which may impact your ability to achieve the outcome you've described. The force field analysis is a nice way of beginning to identify and visually represent lots of information (both hard data and assumptions) that will help to clarify and shape your emerging thinking about the nature of the challenge and inform your thinking about possible strategies for addressing it.

In the diagram on the following page, begin this process, following the directions below.

Desired Outcome

1.

Environmental Trends

2.

+

+

+

Organizational Trends & Events

4.

+

+

+

Stakeholders

6.

+

+

+

Value

8.

+

+

+

Environmental Trends

3.

-

-

-

Organizational Trends & Events

5.

-

-

-

Stakeholders

7.

-

-

-

Value

9.

-

-

-

Directions

1. In this space, rewrite your brief description of the desired outcome from page 9.
2. In this space, briefly write any trends or events in the world around you that are likely to improve your ability to reach your desired outcome.
3. In this space, briefly write any trends or events in the world around you that may make it more difficult to reach your desired outcome.
4. In this space, briefly write any trends or events within your organization that are likely to improve your ability to reach your desired outcome.
5. In this space, briefly write any trends or events within your organization that may make it more difficult to reach your desired outcome.
6. In this space, identify any key stakeholders (individuals or groups) who are likely to improve your ability to reach your desired outcome.
7. In this space, identify any key stakeholders (individuals or groups) who may make it more difficult to reach your desired outcome.
8. In this space write any core values that appear to support the desired outcome you have identified.
9. In this space write any core values that may be in tension with the desired outcome you have identified.

STEP FIVE: Force Field Analysis

Desired Outcome





STEP SIX: Identifying Environmental Trends

Part of seeing your organization whole is the discipline staying aware of the forces and momentums in the world around your organization which are likely to significantly impact it. An example of such an "environmental trend" facing Landry Cycle is the entry into bicycle retail market of large cycling superstores.

In the space to the right, identify some of the environmental trends which are facing your own organization at this moment and which have special relevance for the focus dilemma which you have identified.

STEP SIX: Identifying Environmental Trends

Desired Outcome

Environmental Trends
That May Help

+

+

+

+

+

Environmental Trends
That May be a Problem

-

-

-

-

-



STEP SEVEN: Organizational Assumptions

While there are trends outside of your organization which significantly affect its movement into the future, there are also assumptions about its gathered life which must be noted in order to see it whole. For example, at Landry Cycle, a couple of organizational assumptions which might be noted include:

- Landry has a strong and continually maturing culture with explicit values around excellent service to customers and right relationship among employees.
- Currently Landry is leasing more retail space than they can profitably utilize, creating a cash drain on their organization.
- Utilizing the space boxes below, note some of the assumption which hold true for your own organization.

STEP SEVEN: Organizational Assumptions

Desired Outcome

Organizational Assumptions
That May Help

+

+

+

+

+

Organizational Assumptions
That May be a Problem

-

-

-

-

-



STEP EIGHT: Identifying the Stakeholders

No doubt in identifying your organizational dilemma you had to think about all of the people who somehow have a stake in how this dilemma will be addressed. These "stakeholders" could include staff, management, board members, clients or customers, suppliers, competitors, the wider community impacted by your organization, etc. using the space on the right, indicating by their placement whether this particular stakeholder is likely to support or oppose the outcome you desire. In each instance, add a word to indicate what each stakeholder wants or needs.

STEP EIGHT: Identifying the Stakeholders

Desired Outcome

Identifying Stakeholders
Who May Help

+

+

+

+

+

Identifying Stakeholders
Who May Oppose

-

-

-

-

-



STEP NINE: Consulting Your Organization's Core Values

If your organization has identified its core values, you'll want to consult them for any perspective they may offer on your organization's focus challenge:

Step 1.

To begin this process, use the diagram on next page to lay out your core values as a moral compass. In the outer edge of each of the three dimensions - *Identity*, *Purpose* and *Stewardship* - there are spaces provided for recording your organization's core values. If your organization has identified distinct core values for each of these three dimensions, record them in the appropriate outer ring of the diagram. If your organization has a single set of 3 or 4 values, write them into the spaces provided, with each of the core values appearing three times in the outer band of this diagram, once in each dimension.

Step 2.

Next, represent the focus challenge you've identified with a few words in the center circle of the diagram.

Step 3.

Are there any values that seem especially relevant to the issue you've identified? If so, circle them on your diagram.

Step 4.

The most difficult choices we make are ethical dilemmas, where legitimate values are in tension with one another. In thinking about the issue you are exploring, are there particular values that appear to be in tension around this issue? If so, draw a line \longleftrightarrow connecting those values.

Step 5.

Take one last pass, this time to identify any of your core values that, when you think about the issue you're exploring, seem to be potentially at risk of being compromised? Which... and how? Make note of that here.

Step 6.

In light of your exploration, do you have any initial insights about how to respond to this challenge in ways that feel right to you (consistent with your organization's core values)? Note any insights you have in the space below.

STEP NINE: Consulting Your Organization's Core Value





STEP TEN: “Prouds” and “Sorries”

Now that you have identified the various stakeholders and their legitimate interests, turn your attention in this final preparatory step to acknowledging those things which, as you think about this dilemma, make you proud of your organization. Included among these might be ways in which the organization has successfully embodied important core values. Note these "prouds" in the space below.

PROUDS

1.

2.

3.

4.

5.

Now turn your attention to what you regret—what you wish was not true or had not happened. List these "sorries" below. Included here might be ways that the organization has compromised important core values.

SORRIES

1.

2.

3.

4.

5.



STEP ELEVEN: Applying Criteria to Your Dilemma Statement

Now, as a final step, examine your draft dilemma statement against the following criteria:

- Does the organizational dilemma which I have identified reflect a "goal" in which I personally have a good deal of interest and investment? In other words, do I care what happens?
- Is this adaptive dilemma important to the long term well-being of my organization?
- Am I willing to be accountable, at some level, for how this dilemma is resolved? (In other words, I am not content to simply be a bystander to its resolution.)
- Does this dilemma reflect certain legitimate values within the organization which appear to be in tension and not easily reconciled?

Does your response to any of these criteria suggest some revision or modification in the dilemma statement? If so, record your revised statement in the space to the right.

HOW TO



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