

Let's talk about strategy...

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I'm an independent consultant and coach. I lead user-centred design teams, and I help organisations develop what I call user-centred digital strategy.

So

1. what is strategy and why it matters
2. the key elements of good strategy - regardless of context
3. A simple structure for tackling 'strategy projects'
4. After break - try using it to create a simple strategy for problem you have, including defining vision and goals, diagnosing the problem, and working with stakeholders to make it happen.

What is strategy?

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So what is strategy, and why does it matter that so many things that pass for strategy are actually Bad Strategy?

"There is surely nothing quite so useless as doing with great efficiency what should not be done at all"

— Peter Drucker

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As Peter Drucker said, "There is surely nothing quite so useless as doing with great efficiency what should not be done at all"

Often said that the problem with agile is it "doesn't have a brain". Swimming without goggles on. Swim swim swim. Sprint sprint sprint. Sooner or later you smack into the wall, look round and wonder what the hell it is you've built.

There is a risk, even in the most well functioning agile team, that while you're making lots of progress, it's not clear how all that progress is adding up to something bigger. You're delivering value, but are you delivering the most value you could be given the resources you've got?

So why does so much that passes for strategy not help us answer that question?

Strategy tells us

Where are we going?
What will be different when we get there?
Where are we now?
How are we going to get from here to there?
What might stop us and how will we overcome that?

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At its simplest, a strategy tells you:

"being strategic" is often as simple - and as hard - as taking a step back and asking these questions. And you can ask these kind of questions, and be strategic, in a really broad way - overall business strategy - but they are equally valid in narrower fields.

Fallacy that 'strategy' is something that only happens in the board room. But strategy - that question of: where are we going? how will we get there? how will getting there be better? - can exist at many levels within an organisation.

There is a cascade down, from top-level business strategy to strategies for tackling particular elements of that strategy - brand strategy, product strategy, content strategy. Each one feeds goals - the overarching 'where are we going' - down to the level below. So what looks like 'tactics' at one level may be 'strategy' at the next.

It's how we know we are working on the right things, in the right way.

Good strategy helps make decisions

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A good strategy helps us make decisions.
Does what we're planning to do align with the strategy?
If yes: do it
If no: don't

Good strategy gives us purpose

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We know why we're doing it and the benefit it will bring

We understand how our work fits into a larger whole. That's particularly useful if what we're working on is either quite small, or quite tactical. It helps keep motivation up if we see how it's a building block or stepping stone to something bigger.

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Good strategy enables us to delegate control and decision making

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When everyone is clear on the goal, and roughly how you're planning to get there, it becomes easier for individuals and teams to work autonomously towards that goal. In this way, a good strategy can actually make an organisation more agile...

Good strategy makes us more agile

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...Make org more agile. Good strategy is exactly what enables teams to have autonomy over their work, while being confident that what they are doing fits into the larger whole.
It's how you know all those little increments add up to a coherent whole, and that you are delivering the most value with the resources you have.

But strategy is often seen as antithesis of Agile. A lumbering process that means months or years of inertia. You're not wrong! Problem is we are plagued by too much bad strategy...

Bad strategy

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The problem is there is too much bad strategy out there.
It's not that strategy sucks, it's that so much of what passes for strategy sucks. I mean, really sucks

Bloviating nonsense. The worst kind of buzzword bingo. Stuff like this:

Our strategy is collaborative growth.

We will lead a customer focused effort of the market through our use of digital business and Internet of things ecosystem to build a cloud based revolution.

By being both innovative and open, we will drive competitive advantage throughout the organisation. Synergies between our data leaders and agile culture will enable us to capture the upside by becoming networked in a big data world.

These transformations combined with disruptive insight from data due to our digital first platform will create a learning organisation through value and efficiency.

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[read out]

Simon Wardley. A quick route to building a strategy
Make your own at <https://strategy-madlibs.herokuapp.com/>

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This is actually a joke. The frightening thing is it sounds like something an org might actually publish.

Typical of a lot of strategy documents. Lots of big words meant to make the writer look clever. Preferably without actually committing them to anything they might actually be held accountable for later. An ultimately useless document - years in the making.

During which time we have continued to do - with, if we're lucky great efficiency - what perhaps should not be done at all.

There are three tests you can use to sniff out bad strategy, and work out why they're setting your spidey sense tingling. I call them...

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The “**yeah, right**” test

The “**so what?**” test

The “**yes! and...?**” test

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I call them ...
the yeah right test
the so what test
and the yes, and... test

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The “**yeah, right**” test

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The “yeah, right” test is a lofty goal or aspiration presented as strategy. A lot of corporate vision and mission statements fall heavily into ‘yeah, right’. Lofty talk. The Best. World-leading. The word “innovation” probably in there somewhere. All while churning out slightly mediocre, safe solutions. They fail the “yeah, right” test. No one believes the organisation is actually committed or capable of doing what it takes to achieve the

vision. FATAL: If no one believes the goal can be reached, they won't even try.

Also: lack of a coherent plan to achieve it, or failure to appreciate the complexity or scale of the task. You may be familiar with this kind of language...

Insert your city
or region here


Cornwall is going to be the next
silicon valley

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"Cornwall is going to be the new silicon valley."

6 years in the South West - a ridiculous amount of this kind of silly hype from people who should know better. Just makes you look naive. Fails to correctly diagnose the problem or properly understand the reality of the situation.

In this case failing the 'yeah, right' test robs you of credibility and means no one is going to take your

The “**so what?**” test

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The “so what” test is kind of the opposite. Tactics or a solution with no clear picture of how everything will be better once it's delivered. Two kinds of strategy you see like this:

1. 'Christmas tree' strategy. Big organisational 5-year plans particularly prone. Tied to budgets. Everyone tries to attach their pet project or big idea to the strategy. Get anything they don't like taken out. Left = Something pretty

anodyne. At best it's a list of sensible things that you should probably be doing, at worst a waste of the time and energy spent writing it. Danger = writing a strategy that keeps everyone happy takes a long time. Waiting for the strategy to arrive. In meantime nothing significant can get done.

There's another kind of strategy that fails the "so what" test. This is what I call 'shiny things' strategy.

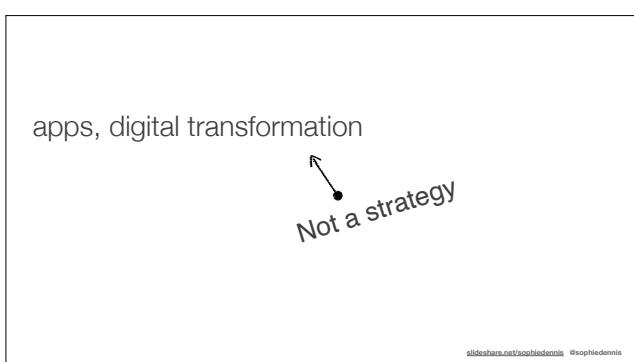


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These are kind of out of fashion, but a few years ago "launching a mobile app" was what passed for a lot of organisations' mobile strategy.

"Apps" are not a strategy. Adopting whatever this year's cool piece of technology is classic shiny things 'so what' strategy. They are solutions in search of user problems.

Here's another, perhaps more



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Seriously. Digital transformation is [clk] not in and of itself a strategy. Your organisation might very well need it.

But it's not a strategy unless you can articulate

- why you need to become "digital" (whatever that means)
- what will be different once you've 'transformed'
- what exactly it is about your legacy IT estate or ways of doing business that's stopping you and

needs to change.

You need to answer the “so what” question.

Other things that are Not A Strategy.



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These things are all a means to an end, or a method for achieving a goal. They aren't the goal in and of themselves. They might be things a strategy recommends you do or invest in. You might need a strategy to implement them. But they do not, in and of themselves, represent a strategy. Unless you are clear about why you are doing these things, and how they will help you achieve your goals, you don't have a strategy. You have some initiatives and a few hand-wavy slogans. It's cargo-cult strategy, in which you do the same things everyone else is doing in the hopes that you'll achieve the same result you think they got.

Many of them fail the ‘so what?’ test, in that it's not clear what they'll achieve or the problem they're intended to solve. And if they pass the ‘so what’ test, they probably fail the ‘yes, and...’ test.

The “**yes! and...?**” test

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The ‘yes, and...’ test are goals with no solution or plan. Unlike the ‘yeah, right’ test, the goal isn’t just some ridiculous, unachievable aspiration. Risk = get everyone fired up, and then they all go off - run around - great deal of noise and activity - not really getting anything much done.

[click for notes on next slide]

The “**yes! and...?**” test

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Could argue digital transformation, innovation, and adopting user-centred, service-design methods are more of a ‘yes, and...’ than a ‘so what’ strategy.

Yes - our long-established high street banks, most of our public-sector institutions, need a good dose of digital transformation and some proper user-centred service design. Their ability to meet customers’ raised expectations of how they interact with organisations - not just online but seamlessly right across channels - is hopelessly hamstrung by a mess of legacy systems and impenetrable code.

But it is not enough for these organisations to say they are going to “do digital transformation” or “be more innovative”. They don’t need buzzwords and slogans. They need a clear blueprint for what ‘being digital’ means for them, and a realistic, coherent plan for how to start delivering it.

The “**yeah, right**” test

The “**so what?**” test

The “**yes! and...?**” test

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Too much of what passes for strategy fails one of these three tests.

If you fail one of these three tests, then I’d argue you don’t have a strategy.

You have a vision, or a plan, or a goal. You don’t have a strategy.

You might call it a strategy.

It might have strategy on the title page.

But it’s not strategy.

Or, if we’re being generous, it’s a bad strategy, which is unlikely to deliver the results you’re hoping for.

So fun as it is to mock the fluff and waffle that often passes for strategy, let’s turn our attention to the real question:

what makes a good strategy?

So what makes a **good strategy**?

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Strategy is a **coherent plan** to
achieve a goal that will lead to
significant positive change

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After going through my three tests, and ranting a bit about things that are Not A Strategy and why they're Not A Strategy I've come to this definition:

Strategy is a coherent plan to achieve a goal that will lead to significant positive change

Let's break this down a bit.

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Strategy is a **coherent plan** to
achieve a goal that will lead to
significant positive change ←

Strategy is
about
changing
something

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A strategy should be about changing something
You need a strategy because you want or need to change something.
Strategy = addressing the problems and obstacles that are preventing that change from happening. Is how you pass the “so what” test - what is going to be different and how are things going to be better as a result of doing this?
Sometimes the correct strategy is to keep doing what you’re already doing. You’ve already pursued a successful strategy that’s got you to that point. You need to keep incrementally improving and optimising what you’ve got. What you don’t need to do is embark on some strategic initiative, or start implementing strategic solutions.
Sometimes the best strategy is to do nothing, and wait for a change in situation or opportunity that means you need to act, or have the opportunity to act. Jobs: “I’m waiting for the next big thing...”

Strategy is a **coherent plan** to achieve a goal that will lead to significant positive change

← • Strategy should achieve a goal

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Secondly, strategy should achieve a goal. The end state you're aiming. Something tangible and concrete. Amorphous goals like "digital transformation" are out. "Increased profit" is also not a goal. More profit is the change you want to see. The goal here is the overarching method you'll use to achieve it - attracting new customers for your existing product, selling a new product to your existing customers, focusing your efforts on a particularly valuable customer segment, or entering an entirely new market. But ideally you'll pick one of those as your overarching goal that will deliver the positive change of more profit.

Key = achievability. Must be realistic that by following the plan the goal can be reached. If not, you're failing the "yeah, right" test. This is what distinguishes a strategic goal from visions and mission statements. Doesn't mean lacks ambition.

Strategy is a **coherent plan** to achieve a goal that will lead to significant positive change

← • Strategy should be coherent

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Strategy should be coherent Having a coherent plan for how you'll achieve your goal is how you pass the "yes, and..." test

coherent

ke(ʊ)'hɪər(ə)nt/

adjective

1. (of an argument, theory, or policy) **logical and consistent**
'they failed to develop a coherent economic strategy'

2. Forming a unified whole

'the arts could be systematized into one coherent body of knowledge'

<https://en.oxforddictionaries.com/definition/coherent>

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by coherent mean - logical, consistent, and forming a unified whole

Your strategy must present a logical, rational plan for achieving your goal.

That means it must take a clear-headed look at the likely problems
It needs to answer objections and difficulties

Take on barriers

And talk about how to address them
At least at a high-level

Let's look at an example of how a famous strategy meets this definition



Moon Shots

https://commons.wikimedia.org/wiki/File:Aldrin_Apollo_11_candid.jpg

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Possibly one of the most famous strategies of the 20th century.
President Kennedy's ambition to land a man on the moon.

When we talk about 'taking a moon shot', what we usually mean is a big, ambitious goal with a slim chance of success, little idea of how it can be achieved, but the chance for a big pay off. It's almost the definition of failing the "yeah, right" test

But in fact that wasn't really the case. Kennedy's 1961 speech is in fact almost a perfect study in good strategy.

Exercise

Read through Kennedy's moonshot speech
In your group discuss:

1. What is the **concrete, tangible goal**?
2. What is the **significant positive change** Kennedy hopes achieving it will bring?
3. What leads Kennedy to believe **the goal is achievable**?
4. What are the most significant **barriers to success**?



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Kennedy photo <https://www.flickr.com/photos/nasacommons/9460946426/in/album-72157634969149583/>
See high res version in Dropbox

Strategy is a **coherent plan** to **achieve a goal** that will lead to **significant positive change**

What was the
concrete,
tangible
goal?

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Ask: What was Kennedy's goal?



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"before this decade is out [to] **land a man on the moon and return him safely to earth**"

Firstly, Kennedy's most famous objective was also concrete and tangible: "to land a man on the moon and return him safely to earth". This is tangible and concrete in a way "win the space race" is not. It is clear what success looks like and how we'll know if we've succeeded.

Strategy is a **coherent plan** to **achieve a goal** that will lead to **significant positive change** ←•

What significant , positive change is it trying to bring about?

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Ask: what was the significant positive change
western democracy: good,
communism: bad.
Also winning the space race > could talk about hierarchy/fractal here too.

Strategy is a **coherent plan** to **achieve a goal** that will lead to **significant positive change** ←•

How does he show the goal is achievable ?

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Ask: why does Kennedy believe this goal is achievable?



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Kennedy's moonshot was achievable.

There were engineering challenges
But the basic science was well understood

And they'd already broken it down
into a series of engineering
challenges which needed to be
solved.

And identified that the biggest
barrier was a whole-hearted
commitment to a singular goal, and
concentrating resources and time
on fulfilling it.

In this way Kennedy's "moon shot"
also tackled the third part of our
definition of good strategy: having a
coherent plan. You may have pulled
out...



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Kennedy presents a clear plan of attack: new lunar space craft, more powerful rocket engines, unmanned missions, hundreds of millions of dollars.

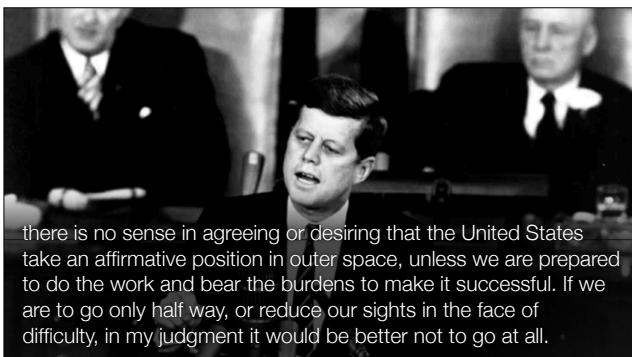
Kennedy's moonshot passes the
"Yes, and..." test. Yes we can all get
behind putting a man on the moon.
How cool is that? But Kennedy
doesn't just have a dream, he also
has a plan.



many years... heavy costs ... a degree of dedication, organization and discipline which have not always characterized our efforts... we cannot afford inflated costs of material or talent, wasteful interagency rivalries, or high turnover of key personnel

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And he is also really clear about the obstacles facing his goal of putting a man on the moon. It will take many years, a lot of money, a degree of dedication and organisation that, let's face it, is not always present in government work. There are risks: inflated costs, interagency rivals, and high staff turnover. All this will be hard. And so he is clear...



there is no sense in agreeing or desiring that the United States take an affirmative position in outer space, unless we are prepared to do the work and bear the burdens to make it successful. If we are to go only half way, or reduce our sights in the face of difficulty, in my judgment it would be better not to go at all.

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[quote]

Kennedy's moonshot passes the "Yes, and..." test, and by being clear on the obstacles and his formula for overcoming them, it also passes the "yeah, right" test. Kennedy sets out his case that it is practical and achievable if the country is single-minded in pursuit of that end.

coherent
ke(u)'hɪər(ə)nt/
adjective

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In this way Kennedy's plan also represents a unified whole. He sets down a few key principles - the goal itself, designed to establish the US's supremacy in space. The idea that only by fully committing to the plan, by going "all in", can the difficulties be overcome. These are the big unifying ideas behind the moon shot strategy.

This is what you're seeking when 'doing strategy'. There is a moment

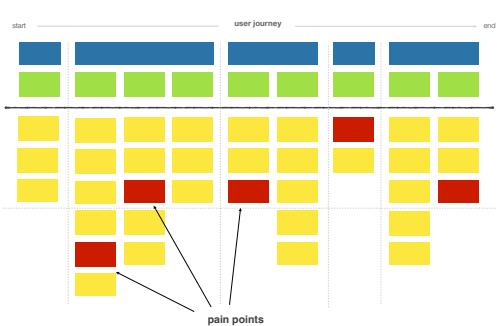
when it all snaps together into an ‘ah ha’ realisation. Good strategy has an inevitability to it. Once you have clearly set out the challenge, the plan you propose should seem almost inevitable. “Now you put it that way *of course* that’s what we should do”.

Focus and leverage

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The unifying idea is what also what provides focus and leverage

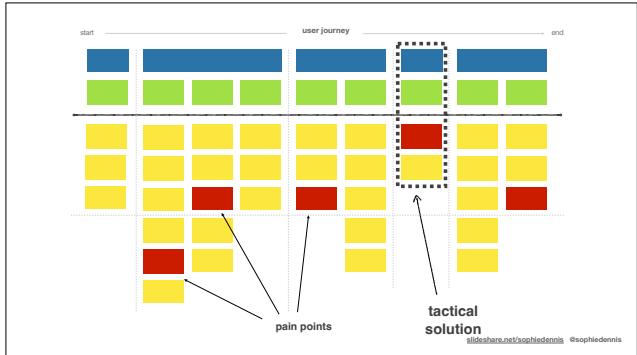
Part of the ‘ah ha’ moment is identifying the approach that will achieve maximum impact. This is what makes something a strategic solution, rather than a bunch of tactical recommendations. Rather than picking off individual problems one by one, we find the approach that will tackle a whole bunch of problems all at once.



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When talking about user-centred digital strategy, or service design, we’re usually talking about diagnosing where the problems are across the journey, and what the underlying causes of those problems are in our ‘back stage’ operations.

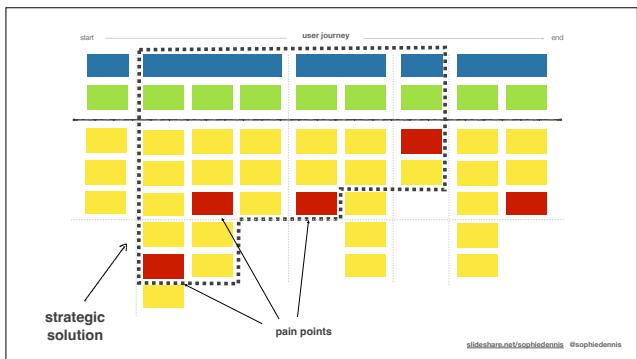
In this case tactical v strategic is about breadth and depth.



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tactical = picking off individual pain points and bits of the journey to fix. You're fixing one thing, or just a few things.

Relatively silo'd.



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strategic solution = looking at where those pain points are right throughout the journey. Asking: is there a larger, more holistic thing that would address a number of pain points across the system?

You're looking for the approach that will tackle a whole bunch of problems all at once. In this way we can find leverage. We focus our resources in a way that magnifies their effects, helping us reach ambitious goals and achieve significant change.

"It's just a website
We're not going to
the moon"

Mikey Dickerson on fixing [healthcare.gov](#)

Photo by Matt Jukes @jukiesie from the Office for
National Statistics Alpha/Beta team
digitalblog.ons.gov.uk/2015/03/24/ons-digital-sxsw/



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So how does this apply to us?
After all as Mikey Dickerson said
about fixing [HealthCare.gov](#) in the
US, "it's just a website, we're not
going to the moon".

Two examples:

Structured data capture and storage

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Problem: a government department captures most of the information about people applying for its services as free text on long, hand-written paper forms. The only way to retrieve that information is for a person to read it off a scan of the paper form. As a result the department asks people for the same information each time they apply for its services. Due to the eligibility criteria people must meet to qualify for the department's services, providing the information is time-consuming, confusing and distressing for applicants.

Strategic solution: replace free-text information gathering and long, scanned paper forms with factual questions stored as structured data.

Most importantly adopting this approach would enable the department to fix a whole host of problems we'd uncovered right through the user journey, and not just for users, but also for the 'back stage' staff processing applications and assessing claims.

Example of 'strategic' not 'tactical'
solution:

Pattern Library & Style Guide

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Problem: web estate is inconsistent and disjointed, doesn't offer a coherent experience.

200+ websites

made by teams spread out across site entire country from Bristol to Edinburgh, many of them working satellite organisations

- there is no established 'house style' for websites
- teams often didn't have dedicated design or front-end developers, and so use off-the-shelf tools like Bootstrap to build their UI

Strategic solution: style guide and front-end pattern library that both establishes a 'house style' that all sites should be using, but also does a lot of heavy lifting for teams that don't have dedicated designers or front-end devs

How do you find this unifying idea?
Answering these Qs = 3 basic stages.

1. Diagnose the problem

what is the true nature and extent of the problem? what are we really trying to achieve? what's really going on here?

2. Find the unifying idea

what overall approach will enable us to cope with and overcome the obstacles identified in the diagnosis? what is the common thread in the problems we've found? where can we focus in order to apply leverage?

3. Craft a coherent plan of attack

what is the co-ordinated set of actions or steps we should take that will work together to accomplish our goal?

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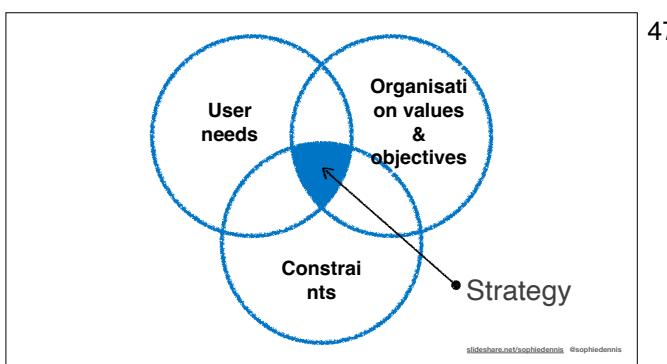
[walk through stages]

Your unifying idea and plan of attack can only emerge once you have a clear-headed diagnosis of the problem. You need to understand what is really going on, what you are really trying to achieve and what the obstacles are to doing that within your organisation, before you can come up with a unifying idea.

IMO a lot of 'bad' strategy is really vision-setting. What it lacks is a clear diagnosis of either the problem the vision will solve, or how to overcome the reasons the vision isn't already a

reality. You'll normally embark on a strategy project with a fuzzy idea of the vision or outcome. Diagnosis is what turns that fuzzy, hand-wavy vision into reality.

Classic 'double diamond' defining the problem space. Diagnosis is all about understanding...



Yes, you need to be a grown up and start thinking about what the organisation wants and is trying to achieve, and the constraints you need to operate within (or remove). In both case studies, the unifying idea was about balancing three forces.

"See the whole board" ...
"Situational awareness"

Diagnosis is the really hard part. It's hard for two reasons. First: it requires people to be really honest about problems. This is one reason we end up with anodyne 'so what' and 'yeah, right' strategies. Either no one wants to grapple with the real problems, because they're too hard. Or no one really wants to look too closely at what's really going wrong.

1. **Denial** - our thing is not broken
2. **Anger** - we hate you for telling us
3. **Acceptance** - holy crap our thing is broken

Dan Hon, 'Stages of Transformation', 11 April 2011
tiny.cc/meyarw / danhon/letters/s4e10-stages-of-transformation

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I liked Dan Hon's description of the stages of digital transformation:

Sometimes the art isn't in finding the problems, but in articulating them in a way that avoids people feeling blame, shame and guilt.

Dan's advice is to assume everyone is doing their best. No-one *wants* to do a bad job. You can probably assume that people are doing the best job they can in the circumstances they're in. Focus on talking about changing the circumstances, not blaming the people.

[Working with stakeholders = master skill. We'll talk more about working with stakeholders later...]



"A good diagnosis simplifies the often overwhelming complexity of reality by identifying certain aspects of the situation as critical."

Richard Rumelt
Good Strategy/Bad Strategy

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The second reason diagnosis is hard because it involves making sense of complexity. Richard Rumelt says "a good diagnosis simplifies the often overwhelming complexity of reality by identifying certain aspects of the situation as critical". It's in doing this that the unifying idea emerges.

But we can't go about simplifying reality and boiling it down to the critical factors unless we first

understand the complexities.

The process of reaching a clear diagnosis is hard because at some point it involves wading knee deep into the complexity. Sometimes you don't even really know what the problem is, let alone what the goal should be or the unifying idea for achieving it.



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Experienced policy guy I worked with called this “fog”. Getting comfortable with fog and uncertainty is essential if you’re going to do more strategy work.

You need to accept that you will do things without really knowing in advance what value you will get out of them. They could be a dead end. But discovering a dead end is still discovering something.

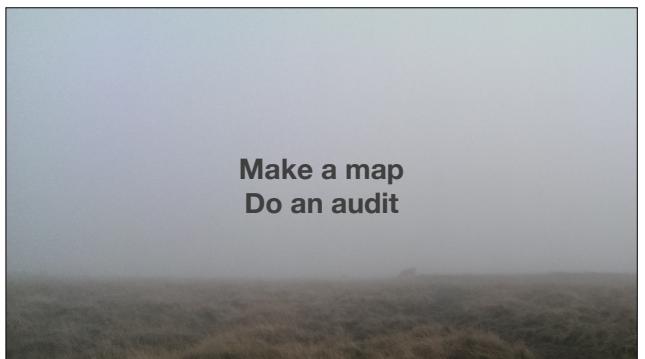
Reach into your service design toolkit. Everyone probably has their ‘go to’ methods for this. Two of my ‘go to’ things to do when you’re lost in the fog and not sure what to do next to make sense of the complexity are...

Move onto this after talking about making the map...

Learn to “trust the process”. Trust that if you keep digging into “what’s really going on here” and “what are we really trying to achieve” that at

some point you'll emerge from the fog into that 'ah ha' moment of clarity.

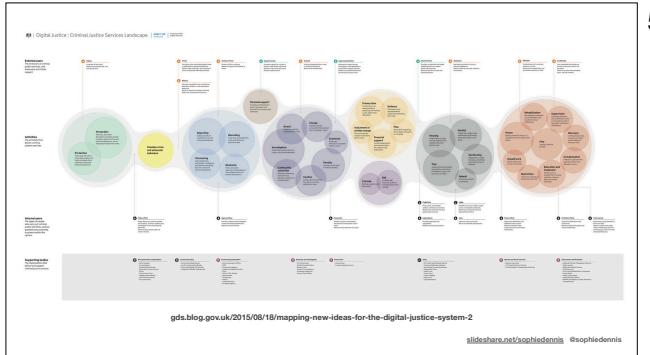
But also, at some point you have to come out of the fog! At some point you need to start writing things down - and not just on post-its.



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Mapping an experience or customer journey, or auditing content or patterns or whatever it is you're interested in changing, are both ways of clarifying where you are now, and the true nature and extent of the problem. As such the process of making the map, or doing the audit, is as important to the strategy process as the output or artefact. It's the understanding they create about what's really going on as a whole that's valuable.

Maps are great because they both expose and simplify complexity.



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This is a really great example of that kind of map. This is a simplified representation of the criminal justice system, created by a team at the Government Digital Service as part of their discovery work. This is a classically silo'd system. This enables you to see the whole journey as experienced by the user, where most staff only ever see what goes on in their bit of it.

It helps you see what's really going on.

To “See the whole board”.

The story is that the permanent secretary at the Home Office - who's kind of the chief exec for a government department - liked this so much he had it put up in his office.



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And remember: maps aren't just a glossy output from diagnosis. They're also a really valuable input. While a finished map is often a tool to present complexity in a simple way to stakeholders and decision-makers. Making the map is a great way to get a handle on all that complexity in the first place.

This is the ‘service blueprint’ for a government service, spread out in my old spare room at home. It's not

exactly what I'd think of as a service blue print. But it was awesome. I travelled round the country with this blueprint, pointing to things on it, and adding lots and lots of post-its.

I didn't end up with a fancy map like the MOJ circles diagram.

Making the map
is as valuable
as having the map

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The point is that making the map was as valuable as *having the map*. The process of understanding the journey, and having an artefact to use as prompts to clarify what was really going on in the system with stakeholders, was key to coming up with the unifying idea that became our primary strategic recommendation. BUT You need to *do it with other people*. Shared understanding: of the customer journey - what you could build - what will deliver the most benefit, that you get from creating it together as a team that is as valuable as the map itself.

One of the simplest ways to start working more strategically as a 'UXer' is to ask: what happens before and after in the user's journey? ...

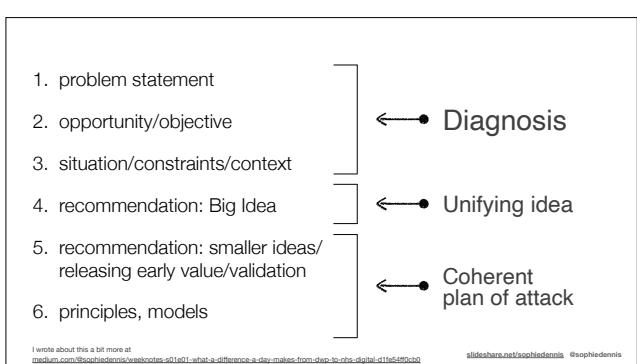


55

Making a map is probably one of my go-to methods in any kind of discovery phase or strategy project. Not all strategy projects involve making a map. But if you're lost in the fog and not sure what do next, mapping the journey, service or ecosystem is a pretty good place to start.

So “trust the process”. Trust that if you keep digging into “what’s really going on here” and “what are we really trying to achieve” that at some point you’ll merge from the fog into that ‘ah ha’ moment of clarity.

But also, at some point you have to come out of the fog! At some point you need to start writing things down - and not just on post-its.



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This is a really simple formula you can use to put some shape on your strategy. You want to be able to articulate these things. If you think you ‘don’t need a strategy’, or you know what it is. Write it down like this. It doesn’t have to be a long document. In 2nd half we’ll have a go at shaping a strategy using this formula.

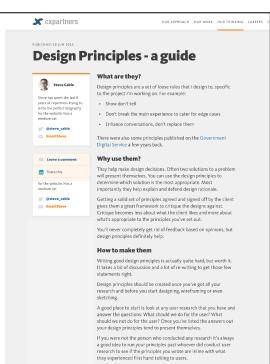
Talk about:

(4) Big Idea = big guess; so (5)

releasing early value - look for opportunities to validate that the Big Idea is achievable, and can lead to measurable change. Public sector: people are suffering RIGHT NOW from bad services - how could you make it better tomorrow?

6) Principles = easy to understand, remember and share. Models = making it real,

I wrote about this a bit more at
<https://medium.com/>



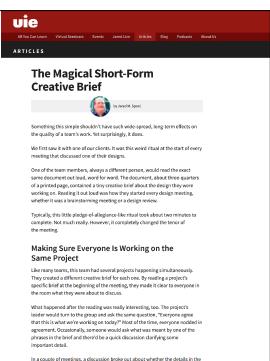
The screenshot shows a blog post titled "Design Principles - a guide" by Steve Cable. The post discusses what design principles are, how to write them, and how to use them effectively. It includes sections on "What are they?", "How to write them", and "How to use them". The post is dated 2014-01-20.

Design Principles
cxpartners.co.uk/our-thinking/design-principles

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For writing design principles my former colleague at cxpartners, Steve Cable, wrote this great article on how to write good design principles.

Help you get away from 'show don't tell' to be more specific about how to balance the trade offs of your particular challenge.



The screenshot shows a blog post titled "The Magical Short-Form Creative Brief" by Steve Cable. The post discusses the benefits of a short-form creative brief, such as saving time and reducing costs. It includes sections on "The Benefits of a Short-Form Creative Brief" and "Making Sure Everyone Is Working on the Same Project". The post is dated 2014-01-20.

Short form creative brief
articles.uiexperiments.com/short_form_creative_brief

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Combine them with your problem statement, objectives, and user needs in the short-form creative brief. This is a great thing to put together at the end of discovery to set the team up for Alpha.

No more than 2 sides of A4 (preferably less)

- 1 - project objective < this could be your problem statement
 - 2 - key personas and scenarios
 - 3 - design principles
- I also like to add:

Questions?

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Whistle stop tour of bad strategy, good strategy and how to 'do strategy'.

Next look more at:

- Vision, goals, and defining the problem
- Have a go at drafting a strategy using the simple diagnosis > big idea formula
- Working with stakeholders - the master skill

Let's have a look at the post-its you wrote at the start.

Short discussion with whole group (10mins).

So let's recap

Vision and goals

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Strategy is...

Strategy is a **coherent plan** to
achieve a goal that will lead to
significant positive change

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It helps you answer these simple
but powerful questions...

Strategy tells us

Where are we going?

What will be different when we get there?

Where are we now?

How are we going to get from here to there?

What might stop us and how will we overcome that?

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Good strategy helps make decisions

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A good strategy helps us make decisions.
Does what we're planning to do align with the strategy?
If yes: do it
If no: don't

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Good strategy gives us purpose

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We know why we're doing it and the benefit it will bring

We understand how our work fits into a larger whole. It helps keep motivation up when what we're working on is either quite small, or quite tactical, or just really hard, if we see how it's a building block or stepping stone to something bigger.

Good strategy enables us to delegate control and decision making

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When everyone is clear on the goal, and roughly how you're planning to get there, it becomes easier for individuals and teams to work autonomously towards that goal. In this way, a good strategy can actually make an organisation more agile...

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Good strategy makes us more agile

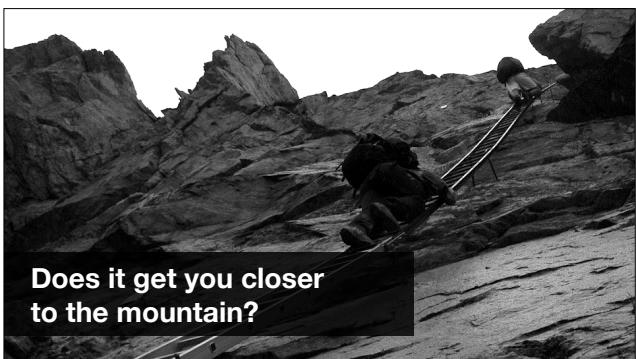
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...Make org more agile. Good strategy is exactly what enables teams to have autonomy over their work, while being confident that what they are doing fits into the larger whole.

It's how you know all those little increments add up to a coherent whole, and that you are delivering the most value with the resources you have.

One of my secrets to keeping strategy agile is to focus on answering a simple question:....



Does it get you closer to the mountain?

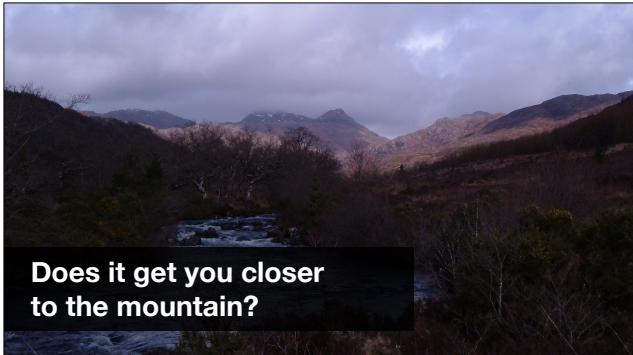
67

Great speech by Neil Gaiman in 2012 to University of the Arts, he talked about how he always weighed his life choices by what he called “getting closer to the mountain”.

And I really liked that idea. Because a mountain may look like this close up.

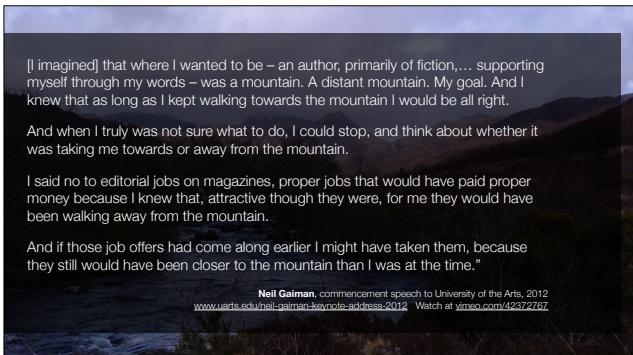
An obvious sequence of steps to get from A to B.

But most of the time a mountain looks like this....



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It's kind of fuzzy and indistinct and off in the distance somewhere. And there's lots of different, interesting routes you could take to get there. The trick is to focus on the "where are we going" and "what will be different when we get there". And then say 'yes' to doing stuff that gets you closer. And say 'no' to stuff that takes you further away. As Gaiman says: (click for full quote)...



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[I imagined] that where I wanted to be – an author, primarily of fiction,... supporting myself through my words – was a mountain. A distant mountain. My goal. And I knew that as long as I kept walking towards the mountain I would be all right.

And when I truly was not sure what to do, I could stop, and think about whether it was taking me towards or away from the mountain.

I said no to editorial jobs on magazines, proper jobs that would have paid proper money because I knew that, attractive though they were, for me they would have been walking away from the mountain.

And if those job offers had come along earlier I might have taken them, because they still would have been closer to the mountain than I was at the time."

Neil Gaiman, commencement speech to University of the Arts, 2012
www.uarts.edu/neil-gaiman-keynote-address-2012 Watch at vimeo.com/42372767

To keep doing stuff that gets you closer. And say 'no' to stuff that takes you further away.

Helps you be agile. Rather than fixing the whole plan up front, you course correct by constantly checking "is this getting us closer to the mountain". Also: let's you turn what looks like a bunch of tactics into a stealth strategy - e.g. LR "Make Design A Thing".

The art is in picking the right mountain - far enough away to be aspirational, near enough that you can have influence on the choices made about how to get there.

Because danger when you get into working on 'strategy' stuff is this:

Beware

Problem Definition Escalation

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The client asks you to design a business card

You respond that the problem is really the
client's logo

The client asks you to design a logo

You say the problem is the
entire identity system

The client asks you to design the identity

You say that the problem is the
client's business plan

Michael Beirut. "You're So Intelligent", Design Observer, 9 May 2007
designobserver.com/feature/youre-so-intelligent/5917/
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Great article from back in 2007 by Michael Beirut in Design Observer. Talking about graphic design, and how designers seek to hoik themselves up the problem scale and win a seat at the strategy table.

... One or two steps later, you can claim whole industries and vast historical forces as your purview.

One or two steps later, you can claim whole industries and vast historical forces as your purview

The problem isn't making something look pretty, you fool, it's world hunger!

Michael Beirut. "You're So Intelligent", Design Observer, 9 May 2007
designobserver.com/feature/youre-so-intelligent/5917/
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One or two steps later, you can claim whole industries and vast historical forces as your purview

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What are you doing?
Making it easier to book an appointment for a flu jab

Why?
So more people get their flu jabs

Why?
So fewer people end up in hospital with severe, life-threatening flu

Why?
To reduce pressure on the health service

Why?
ONLY WE CAN SAVE THE NHS!

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There is a big danger when you get into ‘strategy’ of falling into the problem definition escalation trap:

Suddenly we’re not designing a service to get a flu jab, we’re saving the NHS. And you can go on and on up this chain, and sooner or later you end up somewhere like this:

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“the nature of these challenges are emblematic of deeply entrenched flaws in our institutional structures, our underlying theories, definitions of success, and ultimately **how we have constructed our civilization.**”

Christian Bason
The frontiers of design for policy

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This is from Christian Bason talking about “Super-wicked problems” - not just wicked problems, *super* wicked problems.

It’s not that this is wrong. It may well be that our entire structure of **politics, government + how we’ve constructed our civilisation** = fundamentally flawed and **hopelessly constraining us from delivering bold, transformative change.**

But we’ve gone from designing a service to get a flu jab to saving the NHS to:
overthrowing the entire structure of **politics, economics, and late-stage liberal Western capitalism.**

People still don't have their flu jabs

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And people still don't have their flu jabs.

Pick a problem you might actually be able to solve, or a solution that's in your power to implement.

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Sometimes we can make more of a difference to more people more quickly by tackling the smaller problems. Sometimes the strategy is delivery. It's about getting products and services out into the world that solve real problems for real people. Don't be afraid to start with something small you can actually ship, especially not if that's a first step to delivering something bigger.

What are you doing?
Making it easier to book an appointment for a flu jab

Why?
So more people get their flu jabs

Why?
So fewer people end up in hospital with severe, life-threatening flu

Why?
To reduce pressure on the health service

Why?
ONLY WE CAN SAVE THE NHS!

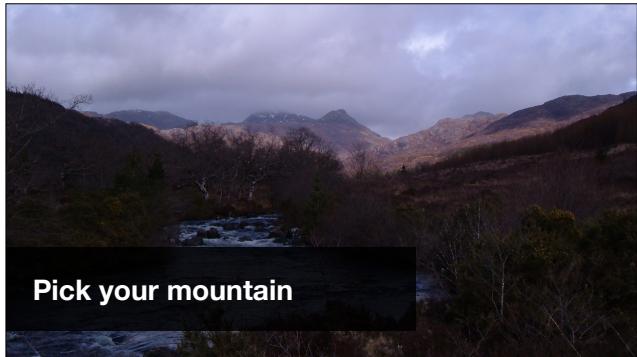
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Because strategy can happen at any level here...
These things cascade.
One level's "achievable goal" becomes the next level's "significant change".

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No matter where you are in this chain, you can choose to be more deliberate and strategic about how you approach the problems you're solving. Usually that involves looking up just one level from where

you are. So if we are working on making it easier to book appointments for flu jabs, we can be more strategic by keeping our eyes on the goal of making sure more people get their jabs. If it turns out the problem isn't booking the appointment, we can have those conversations.



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You need to pick your mountain, at the right level where you can have agency and make a difference.

If you are an engineer working on rocket boosters, it helps to know you are playing a vital role in defending the American Way against the commies, but that doesn't necessarily help you make decisions in your day to day work. For you the fact your rocket boosters have to be powerful enough to get a man to the moon is more important.

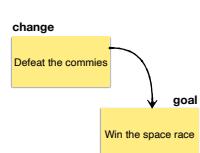
In our world, a basic tenet: by becoming more user-centred, we can deliver better, more profitable digital solutions. As a strategy, that's a bit of a "so, what" strategy. At a high-level in a business, it's valid as a unifying idea. But at our level "becoming a user-centred organisation" may more be the change we're seeking.

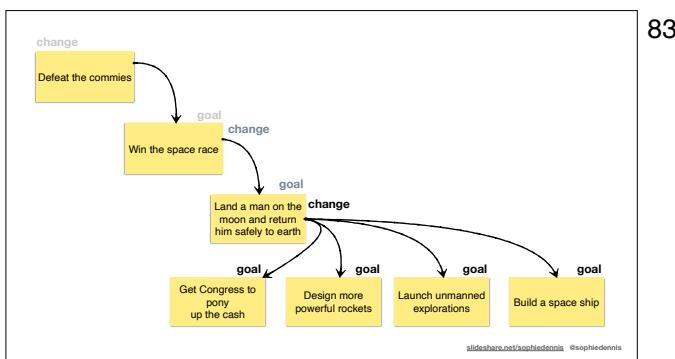
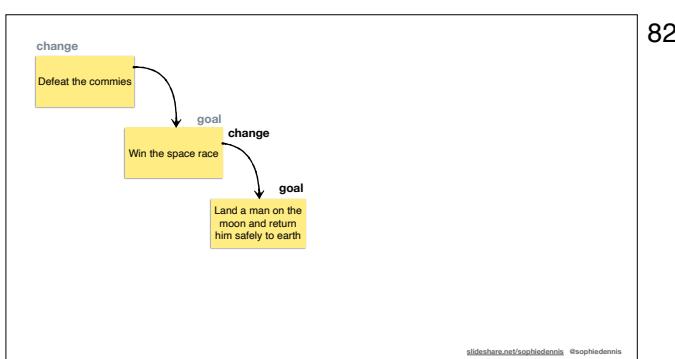
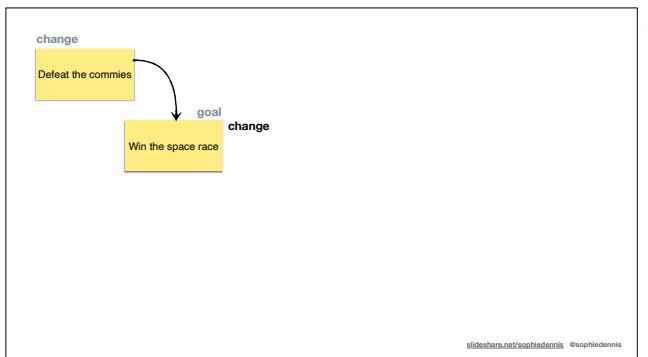
Let's have a look at this cascade of change and goals...

What is Kennedy's hierarchy of goals?

1. What is the mountain?
2. What is the nearer peak?
3. What are the interim goals?

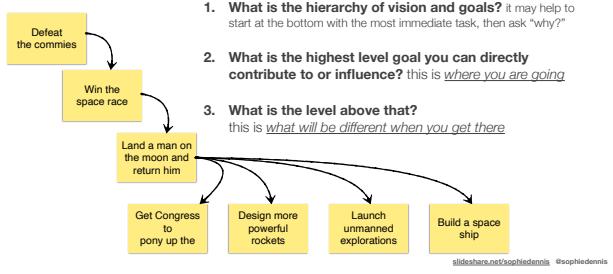
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Pick your mountain

Think about a project you are working on, or a situation you want to change:



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Strategy tells us

Where are we going?

What will be different when we get there?

Where are we now?

How are we going to get from here to there?

What might stop us and how will we overcome that?

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So we know where we are going, and what will be different when we get there. The next stage is to answer the rest of the questions...

Strategy tells us

Where are we going?

What will be different when we get there?

Where are we now?

How are we going to get from here to there?

What might stop us and how will we overcome that?

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1. Diagnose the problem

what is the true nature and extent of the problem? what are we really trying to achieve? what's really going on here?

2. Find the unifying idea

what overall approach will enable us to cope with and overcome the obstacles identified in the diagnosis? what is the common thread in the problems we've found? where can we focus in order to apply leverage?

3. Craft a coherent plan of attack

what is the co-ordinated set of actions or steps we should take that will work together to accomplish our goal?

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[Recap...]

Your unifying idea and plan of attack can only emerge once you have a clear-headed diagnosis of the problem. You need to understand what is really going on, what you are really trying to achieve and what the obstacles are to doing that within your organisation, before you can come up with a unifying idea for how to get there.

So let's have a super-quick go at a bit of diagnosis:

1. problem statement

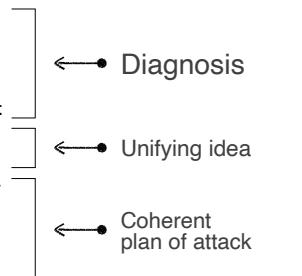
2. opportunity/objective

3. situation/constraints/context

4. recommendation: Big Idea

5. recommendation: smaller ideas/ releasing early value/validation

6. principles, models


I wrote about this a bit more at
medium.com/@sophiedennis/weeknotes-s01e01-what-a-difference-a-day-makes-from-deep-to-near-digital-411e54f9c0
slideshare.net/sophiedennis @sophiedennis

So let's have a go at the diagnosis part of this formula to do a super-quick analysis.

Think of the goal you identified in the last exercise. Something where you have a good understanding of the problem you are trying to solve.

Remember: your unifying idea and plan of attack can only emerge once you have a clear-headed diagnosis of the problem. You need to

understand what is really going on, what you are really trying to achieve and what the obstacles are to doing that within your organisation, before you can come up with a unifying idea.

Exercise

Brainstorm on page one of the strategy worksheet, or using post-its:

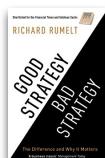
1. Problems (for users, for org, for you)
2. Objectives (for users, for org, for you)
3. Opportunities
4. Constraints
5. Wider context/situation

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Pick something where you have a good understanding of the problem you are trying to solve.

Brainstorm on page one of the strategy worksheet, or using post-its:

Problems (for users, for org, for you)
Objectives (for users, for org, for you)
Opportunities
Constraints
Wider context/situation



"A good diagnosis simplifies the often overwhelming complexity of reality by identifying certain aspects of the situation as critical."

Richard Rumelt
Good Strategy/Bad Strategy

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Next: boil it down

Recap: Richard Rumelt

So let's try to boil down that mass of problems, objectives, opportunities and constraints into something more focused...

Problem statement

This should be made up of:

- the specific problem, or user need, you want to address
- the result of the problem
- the situation which makes the problem a priority, or change of situation which makes the problem higher risk
- the risk or opportunity that's a result of the problem and situation

Melanie Cannon, Lead Content Designer, DWP. [How to write a problem statement](#)

medium.com/leading-service-design/how-to-write-a-problem-statement-50e2c87910fe

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Mel Cannon at DWP has produced some fantastic guidelines on writing problem statements, mission statements, service names and descriptions. This is the very essence of “simplifying the often overwhelming complexity of reality by identifying certain aspects of the situation as critical”

Ideally you want each of these statements to be *one or two sentences each.*

I totally failed. But trying to get these did make it really punchy. There was no room for fluff and caveats. I had to get right to the point of what the problem was, its impact on users and the organisation, and the risks to both if it wasn't addressed.

Also: Helping teams define their focus

<https://dwpdigital.blog.gov.uk/2017/02/28/helping-teams-define-their-focus/>

Example of a problem statement for Strava, the running and cycling app

the specific problem, or user need, you want to address It can be difficult to stay motivated to do regular exercise.

the result of the problem A lot of people start an exercise routine like running or cycling regularly, but don't keep it up.

the situation which makes the problem a priority, or change of situation which makes the problem higher risk In the UK, obesity is increasing and people are finding it more difficult to cope with mental health problems. We know that taking regular exercise improves our physical health as well as our mental health.

the risk or opportunity that's a result of the problem and situation There's an opportunity to help people stay active and improve their performance. Connecting them with other people for support, encouragement and competition, and making it easy for them to analyse their workout, could help more people stay motivated.

Melanie Cannon, Lead Content Designer, DWP. [How to write a problem statement](#)

medium.com/leading-service-design/how-to-write-a-problem-statement-50e2c87910fe

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Either for your own problem, or use the ‘moon shot’ speech.

Exercise

Refine your definition of the problem by drafting a problem statement using Mel’s formula

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1. Diagnose the problem

what is the true nature and extent of the problem? what are we really trying to achieve? what's really going on here?

2. Find the unifying idea

what overall approach will enable us to cope with and overcome the obstacles identified in the diagnosis? what is the common thread in the problems we've found? where can we focus in order to apply leverage?

3. Craft a coherent plan of attack

what is the co-ordinated set of actions or steps we should take that will work together to accomplish our goal?

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[RECAP] So now you have a clear-headed diagnosis of the problem
Let's look at finding a unifying idea, and coherent plan of attack.
[talk about tactics and focus again]

Page 2 of worksheet...

Talk through the headings...

What's the one Big Thing that if you did it might solve many problems?
Don't forget the goal and the positive change.
How can you release early value?



Working with stakeholders

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Working with stakeholders is one of the ‘master skills’ you need to do strategy work
“Stakeholders” aren’t just senior decision-makers and executives. They are also the people whose work will be affected by any changes. And the people you’ll need to implement any changes.

Stakeholders matter for two reasons:

- they know what’s really going on



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1. Stakeholders know what's really going on

Talking to stakeholders is one of your go-to methods of diagnosis, because often the people on the ground already know what the problems are. They also often have really good ideas about how to fix them. Essence of co-design - that service users and delivery staff already know a lot of the answers. Your job is to unlock that knowledge and identify what’s most valuable and useful.

Although co-design is usually about group workshops, I like to interview the most important stakeholders one-to-one if possible, so I can get an honest account from them of what they believe the problems are. The two most important questions you can ask are:

- how they think it could be better?
- what’s stopping that happening already?

This will help you define the goal, and also diagnose potentially hidden obstacles that aren’t apparent on the surface.

2. Stakeholders can derail the whole process

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Secondly they can derail the whole process. Piss off the wrong stakeholders, or fail to bring them with you, and they can derail the entire process. They might not be able to stop you producing the strategy, but they can make sure it sits in a draw and never goes anywhere.

On the other hand if you bring them with you, they'll be the people who'll make sure things actually get done. And handled right stakeholders will help you spot all sorts of issues and obstacles you might otherwise miss, and navigate around the more tricky characters.

Brief decision-makers and the most influential stakeholders one-to-one if you can

Especially if they are fundamentally supporters

They'll raise objections and alert you to others objections, that your strategy needs to address

They'll help you frame problems in a way that won't get people's backs up

1. People support what they help to create
2. No big surprises
3. They don't have to like it - but they do need to buy-it

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A few principles that are helpful when dealing with influential stakeholders:

- 1. People support what they help to create**
2. No big surprises
3. They don't have to like it - but they do need to buy-it

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People support what they help to create.
 Don't disappear off into your strategy ivory tower and emerge 3 months later with The Plan.
 Find opportunities to get people involved in helping both diagnose the problem and craft the solution.
 This goes in tandem with:

1. People support what they help to create
- 2. No big surprises**
3. They don't have to like it - but they do need to buy-it

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Avoid big surprises.
 As you start to make sense of your findings, and start to get towards a clearer diagnosis and unifying idea, trail them carefully with the most influential stakeholders. A good point for a briefing is once you're fairly clear of your diagnosis, but don't necessarily have the unifying idea or an action plan. Your briefing should be a discussion session not a presentation. You want feedback on what's resonating with people, and what doesn't feel right. (Book in early with your VIPs - who will be difficult to get time in their diaries with?)

[Japanese “going around the roots”]

"Nemawashi"

lit: going around the roots

"In Japan, high-ranking people expect to be let in on new proposals prior to an official meeting. If they find out about something for the first time during the meeting, they will feel that they have been ignored, and they may reject it for that reason alone. Thus, it's important to approach these people individually before the meeting. This provides an opportunity to introduce the proposal to them and gauge their reaction. This is also a good chance to hear their input. This process is referred to as nemawashi."

Defining Nemawashi. Rochelle Kopp, Japan Intercultural Consulting (2012)
japanintercultural.com/en/news/default.aspx?newsid=234

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Part of 12 pillars of the Toyota Production System, so officially "lean". Also refers to involving and consulting the whole organisation - relatively informally - in decisions.

How to do "nemawashi":

Refs:

<https://en.wikipedia.org/wiki/Nemawashi>

<http://blog.toyota.co.uk/nemawashi-toyota-production-system>

- Share early and often
- Share your rationale before you start on solutions
- Make the map together - it focuses discussions
- Open invitation sketching, co-design and ideation workshops
- Brief the most influential people 1:1
- Make your pitch

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- Share early and often
- Share your rationale before you start on solutions - discovery playback / show & tell - may need to book early
- Make the map together - it focuses discussions
- Open invitation sketching, co-design and ideation workshops . Opportunity to outline the problem and get input from lots of other people. Make it open invitation so no one feels excluded. (It doesn't matter if you're not actually that interested in their ideas)
- 'The Pitch' - another briefing. Preview with key people early but not too early - if you can spend the day or two before on individual calls that's ideal. Send round enough in advance for them to read it, but not so far in advance you'll lose control of the situation. 24 hours can be enough.

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1. People support what they help to create
2. No big surprises
- 3. They don't have to like it - but they do need to buy-it**

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Point three is really coming back to the point about a coherent plan and an achievable goal. One of the things that leads to limp, so what? strategies is trying to keep everyone happy. I think my biggest 'win' in strategy work was when one stakeholder said "I don't like it, but I can't argue with it". Strategy is about making choices. Not everyone is going to get exactly what they want. If your proposal is logical and consistent, it'll be a lot

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Who are your stakeholders?

1. Senior decision-makers and executives
2. The people who'll need to implement any changes
3. People whose work will be affected by any changes

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Who knows what's really going on?
Who could derail the whole process, either actively (probably decision makers) or passively (more ground-level people who need to implement it).

Post-its or back of your strategy doc. Can be groups or individuals

Make a plan (if time):

How will you get people involved in creating the strategy so they support it?
How will you avoid big surprises?
How will you make sure everyone understands the rationale, and focuses on that and not just the change?
Who do you need to interview - individually or as a group?
Who should be invited to mapping or design workshops?
etc...

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Guerrilla Strategy

Working in a strategy vacuum

What to do if there is no strategy and you're not in a position to make one?

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Signs you lack a strategy

1. A lot of activity that fails to deliver significant benefits
2. Not knowing which option to pick or pursue
3. Repetitive debate and discussion about focus, priorities and direction - constantly going over the same ground
4. Difficulty choosing between equally valid but incompatible options

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You get into strategy when you realise you can't make decisions because there are no objectives or framework for making them. We've got these ideas. Which should we do? How should we prioritise them?

What to do: if you can, do some diagnosis

- make a map - what does the user do before and after they encounter your service, product or feature
- do an audit - what is the true state of your product or service?
What do you have?

Then ask questions which require concrete answers.

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"If our goal is to X, then I recommend we do A. But if our goal is Y, then we should do B instead"

"Is X or Y more important to our organisation?"

"Is our goal to do A or B?"

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Ask questions which require concrete answers.

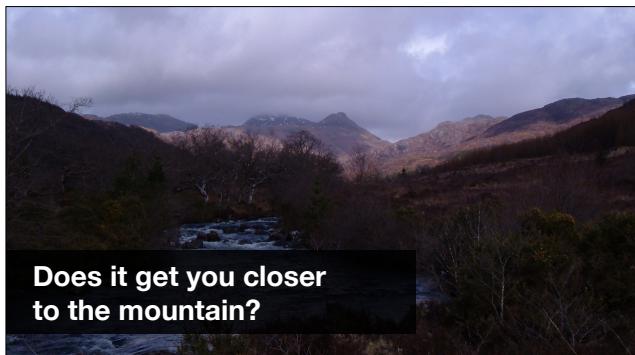
WORK OUT a hypothesis of what the vision or goal might be. Ask if that's right. Ask questions that essentially propose a goal or strategy:

Tread carefully. Ppl will think strategy is "their job". May reject your efforts if step on their toes too much. See your role as *clarifying* and *articulating*.

Pitch it at the right level - must relate to your work and the decisions you need to make. Something they can say 'yes' to.

Co-opt their language, if there is anything vision or strategy like available to you.

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Get an idea of the mountain...

Pick Three Things

The important thing is to try to do stuff that gets you a little closer. And say 'no' to stuff that takes you further away. And the point isn't necessarily to get there by the quickest or shortest path possible. You should probably remember to stop and admire the view every once in a while. And take your time a bit. Maybe you'll never get there, so at least make sure you enjoy the

scenery along the way.

Further reading

Richard Rumelt, **Good Strategy/Bad Strategy**
Lots more examples and advice on good vs bad strategy

Jared Spool, **Beyond the UX Tipping Point**
<https://www.uie.com/brainsparks/2016/05/26/jared-spool-beyond-the-ux-tipping-point-live/>
Becoming a user-centred organisation

Sophie Dennis, **The Art of Things Not Done, NUX5**
<https://www.youtube.com/watch?v=jlh-hvPhqSA>
Product strategy with story-mapping and the Kano model

Megan Casey, **The Content Strategy Toolkit**
Advice, templates and methods for getting buy-in and working with stakeholders. Useful for any kind of design or UX project.

Dan Brown, **Documenting Design Discovery**
<https://medium.com/eightshapes-ltd/documenting-design-discovery-dbf14da1b0e27a24d099d>
More on structuring findings. He's also written a book about it.



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There's loads that I couldn't fit into this talk, so some good resources you might want to check out. There are some copies of this on the tables if you want to take it away with you, which also suggest some other blog posts and tools you might want to check out.

Download the worksheets
<http://bit.ly/2FqWHeK>

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You've been talking about strategy with...

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