

# Introduction to Strategy Mapping

Strategy Mapping is a simple process that enables you to rapidly convey your working hypothesis of how an idea will progress toward a solution. In an easy-to-construct visual format, Strategy Mapping can clarify a range of innovation pathways, including: venture creation, delivery of solutions (be they new products or processes), or even formation of a new approach to experiential training. Designed by James Barlow in 2004, Strategy Mapping has been used to great effect by entrepreneurs, researchers, and others in business, academia, government, and civil society. Ubiquitous across the various applications of Strategy Mapping are three benefits of this tool elaborated upon below:

- 1) the emphasis on conveying four key components (resources, activities, people, products) in proportion to their importance for your initiative;
- 2) the ability to visualize critical connections, feedback loops, and relationships; and
- 3) the visual simplicity that enables communication of your idea with a diverse range of stakeholders.

## **Proportionality**

Early strategic plans often suffer from two common mistakes. First, many fail to include critical facets that will contribute to scale (e.g., customers/users, distribution networks, suppliers, etc.). Second, many of the facets of a plan exist but are portrayed out of proportion. Consider portraiture. When you ask someone to draw a face, they often start with the most obvious features—the eyes, nose—produce them in detail, and then struggle to get the rest of the face in proportion. With strategy it is often the same. Most people will go into great detail about the thing with which they are most familiar (e.g., production of academic research, graduate-level classes that will devise technological prototypes) and then struggle to get the rest of the plan (e.g., user feedback, testing, distribution, manufacturing, etc.) into proportion. Unsurprisingly, it is rare to find an early stage plan that is well proportioned or balanced. Even more so, it is rare to find an early plan for which the thinking about resources, activities, value proposition, etc. is linked, consistent, and aligned.

## **Visualizing relationships and connections**

More important than the details are the key components of your idea/venture and their relationships to one another. In building a Strategy Map we first sketch out the basic proportions of the working hypothesis of the initiative/venture and then iteratively add detail. In this process, connections between inputs and outputs/outcomes can be visualized. To visualize connections, questions such as - How do users feature in your activities? Where are your partner institutions and what resources are they expected to contribute to support your value proposition? - are useful. Such questions help draw the connections between the value and solutions you seek to deliver and the people, technological/knowledge resources, institutions

and other components you need to succeed in doing so.

### **Communicating your ideas**

The more complex the environment in which you are working, the greater the need to communicate your strategy simply and effectively. A Strategy Map helps to communicate the resources and activities by which your idea can translate into impact. For those potential partners in a position to share resources or support activities, seeing how they can plug in is essential. A Strategy Map offers a fast explanation.

## Creating Your Own Strategy Map

The aim of this exercise is for you and your team to create a flow or story board to the current hypothesis of how your team will deliver the outputs/outcomes and value that you seek to deliver. Ideally, you'll want to refrain from investing too much time in exploring the initial 'prototype' because inevitably one's first Strategy Map is riddled assumptions and oversights. The purpose of your first Strategy Map is not to get the perfect strategic plan fully mapped out, but to rapidly prototype as strategy that will help you to test assumptions and leap onto the learning curve. Steps for constructing your first Strategy Map follow.

### **Step 1**

Begin by gathering your team around a pile of multi-colored sticky notes and a large page from a flip-chart. The starting point for a Strategy Map is to articulate what success looks like. You might be meeting a new or evolving need. Perhaps you offer enhancements in performance or efficiency. Maybe you reduce risk or provide greater accessibility to something. Whatever your value proposition may be, it should reflect the unique manner in which your initiative will deliver value in the context in which you seek to deliver it. Your value proposition should be written on a yellow post-it note and be placed at the top of the flipchart page.

### **Step 2**

In pursuit of its overall value proposition, each team commits to delivering specific products or services. Enumerate the key outputs / outcomes you plan to deliver in as succinct a way as possible on the pink sticky notes. Each discrete product/service should be written on a separate pink post-it note. You will probably discern a longitudinal relationship between these outputs. Arrange them on your flipchart page with the nearest-term toward the left of the page and the latter ones toward the right.

### **Step 3**

Next, the activities that need to be undertaken for these products/services should be written on blue post-it notes and placed on the map near the appropriate product or

service.

## Step 4

Consider what resources these products/services and activities require. These should go on green post-it notes. When strategy mapping, it is key to consider the diversity of specific resources implied in delivering outputs, outcomes, and value.

## Step 5

Lastly, examine the context in which key activities are to occur or products/services are to add value in a specific place. This becomes an important part of grounding your Strategy Map in the real world. Does your Strategy Map produce a series of outputs intended for an East African beneficiary who is nowhere on the Strategy Map? What institutional, collaboration-based, human, and knowledge resources must be featured on the map to ensure the context in which you work and with which you seek to deliver value is involved not as an afterthought but at the earliest stage of your initiative? Organizations, Institutions and Individuals that are a part of the method for delivering the outcomes you are driving for should go on Orange post-it notes.

## Step 6

You will begin to see the connections between the various components – products/service, activities, resources, people - on your map. To visualize connections, you can link the post-it notes with pencil lines, illustrating the interplay and relationships between them. It is best to use pencil as your post-it notes will move during the multiple iterations of your map.

# Refining Your Strategy Map

As you build your map, you will be able to start asking key questions that help you refine your plan. For instance, with a blue activity post-it note you might ask: “Who specifically is going to do this activity and what resources will they need?” When considering a green resource post-it note, you could ask: “From where is this resource being sourced and for what output/outcome is it required?”

As you work through this strategic planning process with your team, you may encounter disagreement on how things are viewed or perceived. The key here is not to spend too long discussing it, but to identify the area of disagreement and explore how new kinds of information that you may collect (e.g., insights from students, farmers, nurses, government officials, manufacturers, etc.) might affect the strategy by proving or disproving some of your assumptions. The key to the mapping process is that it is designed to quickly and simply explore scenarios in an “If x, then y” fashion. It doesn’t matter who is right as both parties are expressing an opinion. Rather, divergence can be indicative of the need to investigate certain facts/assumptions further.

## Step 7

Keep a list of issues and assumptions around which your team disagrees as you build your map. Consider this list a set of contenders for fact-finding that you can undertake following the exercise. Armed with further data, you can then iterate on your Strategy Map and discuss the implications for changes to your resource needs and activities.

