LOW-TECH AND HIGH-TECH TOOLS FOR MAPPING YOUR STRATEGIC PLAN

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ABOUT THIS GUIDE

This guide details some tools that you can use to create a visual “map” of your strategic plan for your organization, project, or program (a “Strategic Knowledge Map”). These tools can be useful whether you are developing a new strategy or communicating your existing strategy.

At the end of this guide is a list of links to many additional software/online tools, to give you a starting point if you would like to explore more options.

For information about how to develop a successful strategy, see our guides on “Developing a Successful Strategy” and “From Idea to Action,” available at meaningfulevidence.com. For more information on mapping your strategic plan, see our white papers and case study on Strategic Knowledge Mapping, also available at meaningfulevidence.com.
DO-IT-YOURSELF LOW-TECH TOOLS

You don’t need specialized software to make a map to visualize your strategic plan. You may find it helpful to start with a low-tech tool. A number of low-tech tools can be useful for making a do-it-yourself map:

- Paper and pen
- Flipchart
- Whiteboard
- Post-notes or index cards

You can also use a combination of these tools. For an interactive poster presentation, for example, we made a laminated poster board with the focus/goal of the map printed on it. Participants added pre-printed pieces of paper showing ideas from the literature. They also added their own ideas and connections between ideas that they wrote in with markers.

Some Cool Features

- Can be done at little or no cost
- Tactile approach can be useful

Some Possible Downsides

- Requires everyone working on a map to be in the same room (not designed for collaborating with remote teams)
- Time and effort to set up your own tools for making your map

1 Example map created by adding post-on and write-on ideas to a poster
The ASK MATT tabletop game is a gamified approach to making a map to your strategic goals that we developed at Meaningful Evidence. For more information on the ASK MATT tabletop game, see: http://meaningfulevidence.com/services/ask-matt-game/

Some Cool Features

- Includes all materials needed to create a strategic knowledge map (game pieces, markers, timer)
- Provides a structure for evaluating your map (score card, pieces to indicate positive feedback loops, etc.)
- Gamified approach makes the process of creating and refining your map fun
- Tactile approach can be useful

Some Possible Downsides

- Requires everyone working on a map to be in the same room (not designed for collaborating with remote teams)

Cost: $99 (includes special bonus of up to one hour of training/consulting from a Certified ASK MATT Coach)

2 Example ASK MATT Game for mapping a strategic plan
**POWERPOINT**

**Tips**

- To add a new idea to your map, select Insert, Shape and select a circle (or whatever shape you like). Then enter the name of your idea (e.g. “Customer Service”) in the shape.
- To add a connecting arrow between ideas on your map, select Insert, Shape and select an arrow. Then move the arrow as needed so that it’s connecting the ideas.
- To add your own pictures to your map, select Insert, Picture. For example, for the map below we added our “Fog” pictures to the map below to indicate questionable connections.

**Some Cool Features**

- Many people already have PowerPoint installed on their computers and are familiar with how to use it.
- You can make large size slides (e.g. poster size) for diagramming large maps (select Design, Slide Size).

**Some Possible Downsides**

- Not designed as an online tool for collaboration with remote teams to create and refine the map (you would need a separate document sharing tool for that)
- Not designed to create interactive maps (e.g. a map where clicking on an idea/circle takes you to more information about that idea)
- No automated legend feature (we manually placed pictures and text below the map to create the legend for the map below)
- Arrows do not automatically move when you move boxes, so moving things around can be cumbersome
- Map surface is limited to the size of the slide, so adding more ideas to expand your map can be cumbersome
- No feature for linking together multiple related maps across pages
3 Example Strategic Knowledge Map created in PowerPoint

A Strategic Knowledge Map for a Health Club to Increase Revenue

- Staff Training
- Operational Cost
- Facility Condition
- Club Location
- Number of Staff
- New Idea
- Transformative Idea
- Orphan Idea

- Customer Service
- Customer Relations
- Revenue
- Customer Satisfaction
- Class Choices
- Membership
- Group Activities
- Online Services
- At Location Classes
- Private Coaching
- Causes More
- Feedback Loop
- Questionable
- Goal or Objective

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**Tips**

- To add a new idea to your map, right-click to create a “variable” (or other “primitive”), then name it with the name of your idea (e.g. “Customer Service”).
- To add a connecting arrows between ideas, drag your cursor from one idea (“variable”) to another.
- You can add your own pictures if they are online: right-click and select Create Picture (we added the cloud pictures in the map below by saving them as media files on our website). Insight also has many built-in pictures that you can add to your map.

**Some Cool Features**

- Online tool, can add collaborators to edit map
- Option to create a public map that is visible to anyone or a private map that only you and your collaborators can see
- “Storytelling” feature to walk through your map step-by-step and publish your story as an “article.”
- Can zoom in to get a larger size map, which you can then copy using Print Screen on your keyboard and save as a picture by pasting it into a picture editing program
- Includes a simulation modeling feature

**Some Possible Downsides**

- No automated legend (we manually placed pictures and text below the map to create the legend for the map below)
- Arrows do not automatically move when you move ideas (circles), so moving things around can be cumbersome
- Map surface is limited in size, so adding ideas to expand your map can be cumbersome
- Can’t import/export to/from Excel for further analysis
- Limited space to add information about each connection or idea on your map
- No feature to link together related ideas or connections from multiple maps

**Cost:** Free
4 Example online interactive Strategic Knowledge Map created in InsightMaker

View this sample map online: [https://insightmaker.com/insight/55136/Example-Strategic-Knowledge-Map](https://insightmaker.com/insight/55136/Example-Strategic-Knowledge-Map)
**KUMU**

www.kumu.io

**Tips**

- To add an idea to your map, click the green “+” button, then choose “add element.”
- To add a connecting arrow between ideas, select the idea (element) that you want to connect from, click the green “+” button, choose “add connection.”
- You can add your own pictures to ideas if the pictures are online (create a new field called “Image” and add a link to the image).

**Some Cool Features**

- Online tool, can add collaborators to edit map
- Can import/export map data to/from Excel for further analysis (select the three dots in the lower right corner of the screen for “More”, then select “Export .xlsx”)
- Can add fields to show customized information for an idea/connection on your map and “decorate” ideas and connections (change shape size, color, etc.) by field (e.g. make all ideas representing outcomes the same color)
- Can automatically create a legend to show what your decorations mean based on the fields that you created
- Connecting arrows between ideas (circles/elements) automatically move when you move ideas on your map
- Can move map surface to easily create a very large map
- Includes “presentations” feature to walk through your map step-by-step. To view our presentation for the example map below, visit: [https://meaningful-evidence.kumu.io/insights-from-example-strategic-knowledge-map](https://meaningful-evidence.kumu.io/insights-from-example-strategic-knowledge-map)
- “Capture screenshot” feature lets you easily save pictures of your map
- Can create customized map views to show different parts of your map
- “Issues” feature provides a place for team members to discuss issues related to your map
- Includes social network analysis tool

**Some Possible Downsides**

- Functions take time to learn
- Does not provide an easy way to show data from multiple sources of evidence for ideas and connections on your map

**Cost:** Free for unlimited public maps; private plans start at $9/month
5 Example online interactive Strategic Knowledge Map created in KUMU
View this sample map online: https://kumu.io/Meaningful-Evidence/a-strategic-knowledge-map-for-a-health-club-to-increase-revenue
View accompanying presentation: https://meaningful-evidence.kumu.io/insights-from-example-strategic-knowledge-map
STORMBOARD

stormboard.com

Tips

- To add an idea to your map, double-click on the “Board” (map) to add a “sticky” (idea)
- To add a connecting arrow between ideas on your map, click on one of the arrow points on the starting idea (sticky) and drag your cursor to the idea (sticky) that you want to connect it to

Some Cool Features

- Online tool; can invite people to access your map (“Storm”) (they will need a Stormboard account)
- Can add data or other information about an idea on your map in comments for the idea
- Can import/export to Excel for further analysis
- Can move map surface to easily create very large maps
- Includes legend feature to show what your color coding means for stickies
- Voting feature provides a way for people to vote on ideas and to show the number of votes for each idea
- Option to show idea creators and their avatars
- Can create “Substorms” within storms to show more detail for an idea
- Chat feature provides a place for team members to discuss issues related to your map

Some Possible Downsides

- Limited choice of legend templates; can’t add connectors to legend
- Free version has very limited features; monthly/annual fee for full version
- No ability to make a public map (only you and people who you invite to access your map can see your map; all users must have a StormBoard account)

Cost: Free version for up to five users. Startup version is $5 billed annually. Team version is $8.33 per user per month when billed annually/$10 per user per month when billed monthly.
6 Example online interactive Strategic Knowledge Map ("Storm") created in StormBoard
Tips

- You can use PepperSlice as a supplement to a map. It provides a way to communicate the insights (causal connections) from your map and the evidence for those insights. That evidence can be from research studies and other sources and/or from data that you collect.
- To add an insight, select “Slices”, “Create Slice”. Enter the “Starting” idea (the idea that is the cause of something, e.g. Staff Training), the “Ending” idea (the idea that is the result of the Starting idea, e.g. Customer Service”) and the connection between those ideas (e.g. “causes more”).
- For each Slice, you need to add an image. This can be a graph, table, photo, or other explanatory image. You can add a placeholder image if you do not yet have an image to add.
- Group together related Slices by adding them to a “Board” that you create. A Board contains insights (“Slices”) that explain a topic.
- If you have multiple Boards on the same topic, group them into a Collection (for example, we grouped all of our Boards into a Collection for insights from the map for a health club).

Some Cool Features

- Online tool for collaboration—You can choose whether your Board is visible to creator only, creator and collaborators, or everyone who is logged in to PepperSlice
- Opening any slice shows the supporting evidence source, how the data were collected, and how the data were analyzed
- “Slice-o-Matic” feature lets you easily replicate a Slice (e.g. to include multiple sources of evidence showing the same thing)
- Can add anyone’s available Slice to your Board (supports integrating evidence from related maps that others have created)
- “Rollup” feature tallies the Yes, No, and Maybe responses when multiple Slices look at the same connection between ideas. This lets you can instantly see how many sources across maps have addressed the question and how many sources say Yes, No, and Maybe.
- Poll feature
- “Ask” feature lets you pose a question to PepperSlice users; they answer with evidence and a Yes, No, or Maybe
- Can attach weights to things for decision analysis
- Possible to export to Excel for further analysis

Possible Downsides

- No ability to make a public map that people who are not logged into PepperSlice can see

Note: PepperSlice is currently in the beta stage of development; many additional features are “coming soon.”

Cost: PepperSlice is currently free.
7 Example online interactive “Board” (explanation) for a Map created in PepperSlice

Little Feedback Loop

Insight Board by BernadetteWright | 4 slices

This map contains two Feedback Loops (self-reinforcing cycles).

In the smaller Feedback Loop:
More Staff Training --> better Customer Service --> more Customer Satisfaction --> More Revenue --> More Staff Training

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Pinned Slices

1. Does more staff training cause better customer service? Yes.

2. Does better customer service cause more customer satisfaction? Yes.

3. Satisfaction with Customer Service
   - Very Satisfied: 15%
   - Somewhat Satisfied: 10%
   - Somewhat Unsatisfied: 20%
   - Very Unsatisfied: 55%

4. Does more customer satisfaction cause more REVENUE? Yes.

5. Does more REVENUE cause (lead to) more staff training? Yes.
ADDITIONAL SOFTWARE/ONLINE TOOLS

Below are some additional software programs/online tools that we found, to get you started if you are interested in exploring additional options for mapping your strategy/ideas. This is not an exhaustive list.

- Cmap [http://cmap.ihmc.us/]
- Concept Systems [http://concepts systems.com/software/]
- Crowdicity [http://crowdicity.com/en/]
- DoView [www.doview.com]
- FreeMind [http://freemind.en.softonic.com/]
- Gephi [https://gephi.org]
- Idea Spotlight [https://www.wazoku.com/features/]
- Idea Tree Live [https://www.ideat reelive.com/]
- IdeasMine [https://www.ideaconnection.com/software/ideasmine-255.html]
- iMindMap [https://imindmap.com/software/]
- iMindQ [https://www.imindq.com/]
- InVision [https://www.invisionapp.com/]
- Justinmind [http://www.justinmind.com/]
- LucidChart [www.lucidchart.com]
- Marvel app [https://marvelapp.com/]
- Metamap [https://www.crlab.us/]
- mindjet [https://www.mindjet.com/]
- Nodebox3 [https://www.nodebox.net/]
- OmniGraffle [https://www.omnigroup.com/omnigraffle]
- SmartDraw [https://www.smartdraw.com/]
- TheoryMaker [http://theorymaker.info/]
- TOCO (Theory of Change Online) [http://www.th eoryofchange.org/toco-software/]
- Vensim [http://vensim.com]
- Visio [https://products.office.com/en-us/visio/flowchart-software]
- Wisemapping [http://www.wisemapping.com/]
- Xmind [http://www.xmind.net/]

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