Boxes and Lines
Graphic Frameworks to Communicate Findings & Design Interventions

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Social Systems • Learning • Networks • Organizations • Practice Development
Introduce logical frameworks

- Identify drivers of performance problems
- Design interventions
- Communicate findings and proposed interventions to technical and business professionals
Who is Stephanie Hartman?
Who is Bill Dettmer?

Goal Systems International
How we came together....

- Military Operations & Logistics
- Systems/Constraint Management
- Complex System Problem Solving

- Leader and Team Effectiveness
- Change Management
- Strategic Planning
The Logical Thinking Process

Using “boxes and lines” to synthesize thinking for problem-solving and strategy development
What is it?

A series of five logic trees to graphically depict:

1. WHY change what we’re doing?
2. WHAT to change?
3. What to change TO?
4. HOW to make the change?
What value does it offer?

(Why is it needed?)

• System thinking
  • A holistic picture of systemic interactions
  • Helps resolve conflict related to change
  • More “complete” solutions
    • The “Law of Unintended Consequences”
    • Implementation “map”

• Builds in consensus, “buy-in”
What does it look like?

*Five logic trees*

1. **Goal Tree**
   - Establishes system goal

2. **Current Reality Tree**
   - Determines reasons why system is not achieving its goal

3. **Evaporating Cloud**
   - Resolves conflict concerning organizational change

4. **Future Reality Tree**
   - Change verification, “road map”

5. **Prerequisite Tree**
   - Change implementation
What does it look like?

*Five logic trees*
How is it used?

As an integrated process…

• Strategy development
• Complex problem-solving

As individual tools…

• Day-to-day
Application

Examples

(Bosch) (Germany)

(Deloitte & Touche)

(Raytheon - Missile Systems) (Australia)

(bhp billiton) (Australia)
Conflict Resolution

“Satisfaction or Security?”
Conflict Resolution

Efrat’s Cloud

- Happiness
- Satisfaction
- Security
- Initiate change
- Resist change
Negative Branch

“The Law of Unintended Consequences”
Negative Branch

Michigan Education Assessment Program (p.1)

"...then..."

100 The Michigan education system is failing to educate K-12 students as well as others states do.

101 The state uses standardized tests called the Michigan Educational Assessment Program (MEAP) to evaluate the success of its schools.

"If..."

102 Average MEAP test scores indicate Michigan students are less proficient academically than students from other states.

103 Michigan legislators, the governor, and the public are not happy with average MEAP test scores.

"...and..."

104 Political pressure is applied to the Michigan Department of Education to improve average MEAP test scores.

105 Penalties range from suspension of 5 percent of state aid to replacement of principals and closing of some schools.

106 Principals and teachers recognize that low average MEAP scores threaten their job security.

107 Principals and teachers realize they have to do something about low average MEAP test scores.

108 Principals and teachers look for other ways to make the "heat" go away.

109 The means to real improvement in children’s academic skills (and valid, legitimate MEAP test scores) are beyond the control of principals and teachers.

111 Principals and teachers are unable to take effective action to improve actual student education.
Negative Branch
Michigan Education Assessment Program (p.2)
Hartman’s Performance Architecture
Where’d it come from and why is it here?

- Born from action research
- Leverages Dettmer and Kirkpatrick
- Multi-functional
Hartman’s Performance Architecture

Organization Results
(Cost, Schedule, Quality, Customer Response)

Pattern of Behavior of Person/Group A
Pattern of Behavior of Person/Group B
Pattern of Behavior of Person/Group C

Thoughts, Feelings & Knowledge
Experience
Activity/Event

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Planning for Business Growth

What **results** are you trying to achieve?

- Earn $3K/monthly, doing interior design work, working <40 hours weekly

What are the required **patterns of behavior** and of whom?

**Biz Owner**
- Efficiently and beautifully complete X design projects simultaneously.
- Meet customer expectations.
- Convert prospects to clients.

**Customers**
- Hire me and hire me again.
- Offer referrals and testimonials.

**Contractors**
- Recommend me to homeowners/clients.

**Supporters**
- Karl helps with carpentry projects.
- David edits publications.

What would they need to think, feel or know in order to adopt that pattern of behavior?

**Biz Owner**
- Confidence that I can make $3K per month.
  - I have the facility, materials, and vendor relationships to do the work.
  - I am resourceful, organized and I have the systems in place to juggle many clients at once.
  - How to position the purchase.

**Customers**
- They like my style and approach.
  - How I can help them.
  - They can afford me and the final cost will be near the estimate.
  - What they can expect.
  - Their objectives will be achieved.
  - I'm knowledgeable and easy to work with.

**Contractors**
- What my prices and packages are and that they are reasonable.
  - I'm very professional, knowledgeable and easy to work with.
  - Having me as a resource to redirect customers to saves them from spending time with customers on design decisions.

**Supporters**
- That I'm going to be successful.
  - That I'm trying my best with what I have.
  - How important they are to my business success.
  - How much I appreciate their help.

Necessary experience to shape what they think, feel or know

**Event attendance and positive feedback from prospects and clients.**
- Sample months where this occurs successfully.

**Exposed to my style and approach.**
- When they hire me, it is easy and enjoyable.
  - I'm friendly to them in town.

**Easy to deal with.**
- Customers are thankful for the referral.
  - Enjoy getting to know me and working with me.

**See the pyramid and projections.**
- See me working hard.
  - I appreciate all that they do.
  - Enjoy helping me.

**Intervention strategies to shape their experience**

**Implement pyramid and track tier progression.**
- Set expectations per client checklist.
- Use a timer for client projects.
- Have an open house at ABC Paint.

**Join the chamber, attend their events.**
- Invite customers and their friends to open house.
  - Pictures and stories on FB & blog.
  - Pro bono design work for philanthropy.

**Take them coffee or lunch at customer sites.**
- Invite to all events.

**Take to lunch when possible.**
- Tell them how I appreciate their support in my adventure.
  - Compensate when I can.
## Current State Assessment

### What problem needs to be solved?
Low member participation for a local affiliate of a National Professional Association

**Why can’t we get people to Affiliate, Attend, and Serve?**

### What is the specific problematic pattern of behavior?

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t Affiliate</td>
<td>Less than 70% of new professionals to the area affiliate with the chapter (lowest in region)</td>
</tr>
<tr>
<td>Don’t Attend Again</td>
<td>Affiliate members who have attended meetings do not consistently return</td>
</tr>
<tr>
<td>Don’t Attend Ever</td>
<td>Some affiliate members have never attended a meeting</td>
</tr>
<tr>
<td>Don’t Serve</td>
<td>Only 1 of the board members is “new” (within last 2 years)</td>
</tr>
</tbody>
</table>

### What does that person think, feel or know that drives the problematic pattern of behavior?

<table>
<thead>
<tr>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>They don’t know our chapter exists</td>
</tr>
<tr>
<td>They don’t see value in affiliating</td>
</tr>
<tr>
<td>They don’t know how to affiliate</td>
</tr>
<tr>
<td>The meetings attended were perceived as boring, inefficient and/or irrelevant</td>
</tr>
<tr>
<td>The advertised program topic is not of interest/not worth missing work</td>
</tr>
<tr>
<td>The meeting time conflicts with a work commitment</td>
</tr>
<tr>
<td>The meeting venues are inconvenient</td>
</tr>
<tr>
<td>Concern about possible time commitment</td>
</tr>
<tr>
<td>Don’t see value</td>
</tr>
<tr>
<td>Don’t feel obligated</td>
</tr>
<tr>
<td>Don’t feel qualified</td>
</tr>
<tr>
<td>Don’t feel welcomed</td>
</tr>
</tbody>
</table>
It’s Time to Practice

• At your tables, brainstorm possible interventions to address the problems just described in the Current State
Questions?
Want More Support?

- Dettmer
  - www.gsi.com
  - Some books:

- Hartman
  - www.Catalyst-PerformanceConsulting.com
  - LinkedIn, Facebook, YouTube, Newsletter
  - Own Your Future: A Strategic Planning Workbook