Real world analysis leads to real life options

The second phase of the ToP Strategic Thinking & Planning framework is a sober analysis of the Underlying Reality. Done well, this workshop provides windows of opportunity to the future. It identifies which things need to change, or be acted on, and which things need to be retained, and enhanced or strengthened.

In business, other aspects include (or could be stated as) SWOT, environmental or force field analysis. In project management, it can kick start risk management.

The Underlying Reality is about:

- Asking the basic question: why is the vision not in place already?
- Honestly and frankly describing the group’s real situation – what is actually present – right here and right now.
- Accurately describing the factors the group is dealing with. These are both: those that are preventing the group from achieving its vision; and those that are supporting its efforts.
- Claiming the freedom that comes from addressing the actual situation, rather than an imaginary one.

Things to consider:

- Rather than identifying and analysing forces, people will often:
  - advocate for their (often entrenched) feelings or perceptions.
  - jump to preferred solutions.
- Participants often identify a “lack of…” This is often a way to refuse to own an issue, and put the responsibility to act onto someone else.
- “It's all too hard”. People often use obstacles to rationalise the status quo.
- Your data will always be incomplete. Again, this is not a reason to give up.

Underlying Reality Workshop – Process Steps

**Context**
- Recap the ST&P flow. Outline the work from the practical vision. Provide the practical result and the process for session.
- What is helping or hindering us?
  - Driving/restraining forces/factors in our current situation.
  - Specific, underlying causes.
  - Lack of time, people, money...
  - Assets to keep and strengthen.

**Brainstorm**
- List: X blocks that are preventing us from realising the vision; X aspects that move us towards the vision.
- Need specific, concrete data:
  - Objective statements of reality.
  - EG: Priority is XYZ whereas the vision needs ABC.

**Organise**
- Identify items that have a common factor. EG: same root cause.
- Cluster them together. This can be an iterative process.

**Name**
- Articulate underlying strengths or blocks. Start with the largest cluster:
  - What is the focus of this cluster?
  - What “window of opportunity” do you see?
  - Name the underlying reality.

**Reflect**
- For each area, decide whether you can control or influence it, or if it is simply something you are concerned about.
- What are our clear focus areas?

So, where have you enabled a group to objectively assess its current situation, and open windows of opportunity to their desired future? What went well/not so well? What did you learn for next time?

Go well!

David