Situation Analysis Mapping Steps

Archetype Descriptors for Limits to Success & Plan for Limits:

• Definition
• Mental Model
• Key Point
• Characteristics
• Leverage Points
• Negative Indicators (for + Archetypes)
• Approaches 1, 2, 3, 4 (time continuum)
• Behavior over Time graphs

Finding CLARITY in Complexity
## Situation (Problem or Issue) Analysis Mapping

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Done</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Answer the following questions:</strong>&lt;br&gt;• What is non-negotiable in this situation?&lt;br&gt;• What is working in the situation now?&lt;br&gt;• What is not working in the situation now?&lt;br&gt;• What will happen if nothing changes?&lt;br&gt;• What day is this situation on (with respect to the time delay continuum: Day 1-15, Day 16-25, Day 26-29, Day 30 &amp; Above)?</td>
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<td>2</td>
<td><strong>Select the negative archetypes that are occurring in the situation.</strong></td>
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<td>3</td>
<td><strong>Lay out how the negative archetypes influence each other, using directional arrows to show directional influence, creating a Situation Analysis (Current State) Map. Add feedback directional arrows where appropriate.</strong></td>
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<tr>
<td>4</td>
<td><strong>Select any positive archetypes that are occurring in the situation.</strong></td>
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<tr>
<td>5</td>
<td><strong>Add the positive archetypes to the Situation Analysis Map, showing directional influence, as well as any feedback influences. Once all archetypes are identified:</strong>&lt;br&gt;• Determine the Mental Models driving each archetype, in the language of the business.&lt;br&gt;• Define the pattern-over-time graphs for as many archetypes as possible.&lt;br&gt;• Describe the characteristics for each archetype in the language of the business.&lt;br&gt;• Identify potential Leverage Points for the archetype.</td>
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<td>6</td>
<td><strong>Review the (negative + positive archetype) Situation Map, and craft the summary statement of the situation, written as a high-level story of the situation. (see examples in Handout doc’it)</strong></td>
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<td>7</td>
<td><strong>Select the noisiest archetypes, ranking them relative to each other (using stars or dots).</strong></td>
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<tr>
<td>8</td>
<td><strong>Select negative side effects and possible leverage points, starting with the noisiest archetypes.</strong></td>
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<td>9</td>
<td><strong>Decide which future system (positive archetypes) may arise as a result of taking action on the leverage points.</strong></td>
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<td>10</td>
<td><strong>Identify and select activities that you can do to take action on the leverage points selected in step 8 above. (Refer to Leverage Matrix in your handout)</strong></td>
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<tr>
<td>11</td>
<td><strong>Identify possible negative archetypes that may occur when taking action on the leverage points.</strong></td>
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<td>12</td>
<td><strong>Develop a 30- to 60-day action plan that includes actions connected to the leverage points and actions that mitigate the possible negative side effects. (Refer to Action Plan in your handout)</strong></td>
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<td>13</td>
<td><strong>Monitor your progress on your actions by revisiting your operational system map to determine what has changed. (Refer to 60-Days Back, 60-Days Forward template in your handout)</strong></td>
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**Definition:** There are limits, constraints, and pressures, and more effort is producing fewer results.

**Mental Models:** I will succeed by continuing to do more of what I am doing now.

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**LIMITS TO SUCCESS**

**Key Point:** Identify the limits, and plan on how to deal with these limits.

**Characteristics**
- In the past, efforts led to continued success.
- You are experiencing a leveling-off or a decline in your success.
- You are experiencing pressures or limits that are hindering your success.
- You are working harder, yet the effort is much less effective than it used to be.

**Leverage Points**
- Identify the current limits to your success.
- Examine the system to determine alternatives for easing the pressure in the system.
- Plan to meet the current limits.
- Re-evaluate what you mean by *success*.
- Evaluate whether or not it is still effective to continue to do what has worked in the past.
- Identify and plan for any limits that may arise in the future to hinder your success.

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**Definition:** You spend the time to continuously identify, monitor, and plan for limits that may occur and/or are occurring in the system.

**Mental Models:** I will experience more success by planning for, and dealing with, limits.

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**PLAN FOR LIMITS**

**Key Point:** Identify the possible limits that might occur, or are occurring, and plan on how to deal with these limits.

**Characteristics / Leverage Points / Positive Indicators**
- You spend time on a regular basis to identify possible limits to your success.
- You continuously re-evaluate what you mean by success, and consider other options for success.
- You are prepared to meet most pressures or limits that arise.
- You allow time for your success to occur, knowing that there is a time delay between your actions and the results of your actions.

**Negative Indicators of Limits to Success:**
- You have been experiencing continued success for a while, and you are getting comfortable with this success.
- You are experiencing pressures for which you have not planned, and this is hindering your success.
- You are experiencing a leveling-off or a decline in your success.
- You are working harder, yet the effort is much less effective than it used to be.
LIMITS TO SUCCESS

Approach 1 (days 1-15)
The ideal situation is to spend time planning for limits. If the pressure on the system is manageable, you can take more time to examine the system and re-evaluate what you mean by success.

Approach 2 (days 16-24)
If you are on days 16-24, you will be experiencing more negative side effects. Therefore, you may need to take decisive action to make sure you do not move to days 25-29.

Approach 3 (days 25-29)
It is always harder to deal with a limit when it is adding pressure and stress to the situation. If the pressure on the system is creating a crisis situation, you need to stabilize the system first by easing the pressure on the system.

Approach 4 (days 30 and over)
If you are on day 30 and over, you are now experiencing the full effect of the pressure of the negative side effects. This would be a good time to stop and reassess the situation systemically.

PLAN FOR LIMITS

Approach 1 (days 1-15)
Continuously plan ahead, because it is best not to get caught in a situation in which you are dealing with Limits to Success. Plan for at least three scenarios: if things get worse, if things stay the same, and if things get better.

Approach 2 (days 16-24)
If you are on days 16-24, you will be experiencing more positive indicators of the positive archetypes operating. Monitor for these positive indicators in order to show progress.

Approach 3 (days 25-29)
Continuously re-evaluate what you mean by success, because any change in the system affects what success looks like.

Approach 4 (days 30 and over)
If you are on day 30 and over, you are now experiencing the full effect of the positive nature of the positive archetype. This is a good time to plan for limits that may now arise as a result of being successful.