

## **Designing and Using Tools to Make a Real Difference**

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### **Abstract**

How do you remove a screw if you don't have a screwdriver? Sure, there are other ways, but they'll probably be more difficult, less efficient and maybe even destructive. Community engagement situations are no different. The right tool can make all the difference to success. With more tools, and the right tools, in our toolboxes we can handle more situations, and make our own work and our work with others more effective and successful.

This paper deals with the role of tools, and our experiences in designing and using tools in our own team, and in a range of other situations where people are working together to achieve improvement and innovation. It is also designed to encourage people not to be afraid to design their own tools. If there isn't one readily available 'off the shelf' that suits your need and situation — design your own!

To illustrate the key concepts and principles associated with selecting, designing and using tools, we describe the history of two specific tools we designed to help us do what we call 'Leverage Analysis'. That is, working out which of a range of options will make the most difference to improving a particular situation. Over the years we have used the tools extensively in our own team, and with our partners in organisational, industry and regional improvement and innovation initiatives. We have also adapted them for use with different media, including e-technology.

### **Keywords**

Tools, design, effective, easy

### **Introduction**

In our terms a tool is an instrument that makes achieving outcomes more effective and easier. This definition highlights an important principle — while tools can be extremely useful they are not really the point! The first critical thing is to be very clear about the outcome we need to achieve. The second critical thing is to have a logical set and sequence of steps that will help us achieve the outcome, that is a 'process'. Then we can start to think about tools that will make implementing the process and achieving the outcome easier.

While the tools aren't really the point, having only a few tools in our toolboxes can severely limit our capacity to deal with different situations. Most people have at least two tools in their toolbox — 'Discussion', and 'Argument'. While this statement is of course 'tongue in cheek', our experience is that these two tools get pulled out of the toolbox and used in far too many situations — situations where the outcomes hoped for and needed will not be achieved if these are the only tools available.

Fortunately (or unfortunately due to the confusion that can be created by having too many choices) there are hundreds, more likely thousands of tools available in books, on the Web, in toolkits, from training programs and support groups. It's great to be able to select a tool 'off the shelf', especially if it is really well described so we can be certain that it is designed to do exactly what we need in our situation. Even so, there will still be situations where none of the tools we have immediate access to will be just right for the job. However, we can design our own.

### **Tools for what purpose?**

In our work in achieving continuous improvement and innovation in partnership with teams, organisations, industries and communities, we have found there are specific categories of tools (based on their purpose) that are particularly useful. Table 1 shows the categories and some of the tools that can be used for these purposes. Tools in *italics* are ones our team and partners have designed to help us make achieving continuous improvement and innovation more effective and easier.

When using these tools in our own team and with our partners, we use them in combination with a purposefully designed process such as the Continuous Improvement and Innovation (CI&I) process (Timms et al. 2005). We select and sequence tools to make implementing the process and achieve our outcomes in partnership with others more effective and easier.

**Table 1. Categories of tools of particular use in achieving continuous improvement and innovation in partnership with teams, organisations, industries and communities**

<b>Tools for:</b>	<b>Some of the tools available</b>
Developing shared understanding/mental models, and focusing thinking and action	<i>SMARTT Focus Tool, Focusing Frameworks, Boundary Setting Frameworks, Paradigm Appreciation Tool, The Continuous Improvement and Innovation (CI&amp;I) Game</i>
Analysing situations	<i>Focusing Frameworks, Focusing Questions, System Design and Analysis, Process Design and Analysis, Practice Design and Analysis, Timelines, Specialist Questioning, Why-Why Diagrams, Repetitive Why Technique, Stop Doing Tool, Inverse Thinking, Gross Margin Analysis, Systems Modelling, Fishbone Technique, Flow Diagrams, Life Cycle Analysis, Mind Mapping, Network Game, SWOT Analysis, 10 Domains of Group Process</i>
Deciding what will make a real difference	<i>Impact Criteria, Impact and Influence Tool, Gross Margin Analysis, Return on Investment, Force Field Analysis, Systems Modelling, Sensitivity Analysis, Specialist Questioning, Eight Dimensions Tool, Life Cycle Analysis, Decision Trees, Force Field Analysis, Critical Control Points, Decision-Analysis Framework, Stop Doing Tool</i>
Designing effective action to hit targets	<i>SMARTT Focus Tool, Critical Success Factors (CSFs) Framework, How-How Technique, Timelines Gantt Charts, PERT Diagrams, Team Action Designs, Performance Management Frameworks, Flow Diagrams, Five Ws and One H Tool</i>
Giving mutual support for action	<i>Action Checks, Reporting Frameworks, Recording Frameworks, Reporting for Support Checklists, Charts, Critical Friend, Feedback Loops</i>
Assessing performance and celebrating success	<i>Key Performance Indicators (KPIs), Repetitive Why Technique, Critical Friends, Performance Management Frameworks, Reporting Frameworks, Charts, Gross Margin Analysis, Performance Checks, Achievement Stackers</i>
Learning from experience and creating new opportunities	<i>Observations, Questions, Ideas &amp; Opportunities Tool (OQIO), Why-Why Diagrams, Six Thinking Hats, Brainstorming, Mind Mapping, Sacred Cow Tool</i>

### **Designing our own tools**

Our team has designed several tools over the past eight years. However, we don't design tools for the sake of designing tools. We design them to fulfil specific needs. One of the first tools we designed came about because we realised we regularly found ourselves in situations where we had a plethora of opportunities for action and had to make choices about which ones to take forward as a team, since we couldn't do them all. While there was a range of 'decision making' tools available we decided we needed a simple, easy-to-use tool that we could use to quickly sort opportunities. We designed the Impact and Influence Tool, which is described later in this paper. We initially designed the tool for use in our own team and it served us well for a time. However, as we improved our ability to develop good opportunities we realised we needed to use additional criteria to make sure we took forward only those opportunities that had a high likelihood of being successfully implemented, and that would have the most impact for the effort we would invest in them. So we then designed the Eight Dimensions Tool which we use in combination with the Impact and Influence Tool.

As we became more experienced with using the tools ourselves we started using them in our work with other people since the same need we had recognised in our own team also faced other teams in other situations. When we used the tools with other people they often provided us with very useful feedback and ideas for making them easier to use. In the last few years we have started to use electronic spreadsheet versions of the tools, especially when using them with larger groups (e.g. 10 to 40 people). We have also developed detailed 'facilitation notes' so that people who have found the tools of value in their own work can start to support others to use them. While the different forms of the tools may have become technologically more sophisticated over time, we have made every effort not to lose the basic design features that made them useful in the first place.

### **The Impact and Influence Tool**

Figure 1 shows a simple grid for assessing opportunities for 'Impact' and 'Ability to Influence' which is the basis for the Impact and Influence Tool. The idea behind this tool is that if the option will not have significant impact, it is probably not worth taking forward to action. Additionally, even if the option will have significant impact, if you can't do much about implementing it, then it will be difficult to realise that potential impact. Aim to choose options that will have significant impact and which you can influence. Leave behind those lower impact options or those that you cannot influence. In some situations it is useful to make a quick assessment of opportunities for 'Impact' and another relevant criteria, such as 'cost' or 'motivation'.

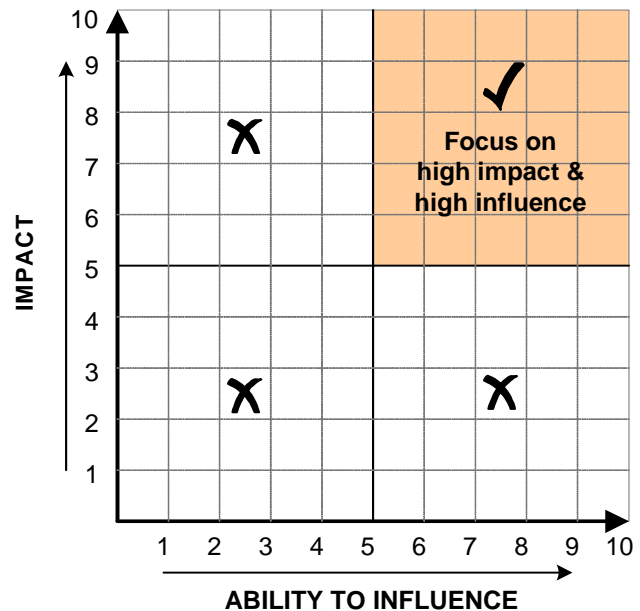
To the left of the grid in Figure 1 is a simple scoring sheet where you can record each of the opportunities you need to analyse and your scores for Impact and Influence. The Impact and Influence Tool can be linked with an electronic spreadsheet to make scoring by a large number of people faster to record, analyse and display.

The steps to use the Impact and Influence Tool are:

1. Write your Focus in the space provided on the worksheet or have your SMARTT Focus worksheet close by to refer to.
2. Write the opportunities for action you have developed in the space provided.
3. For each opportunity, ask yourself "What level of impact will implementation of this opportunity have on achieving the target outcome?" Score the level of impact from 0 to 10 (0 = no impact, 5 = some impact, 10 = high impact) and record the scores for each opportunity in the 'Impact' column.
4. For each opportunity, ask yourself: "What is my personal ability to contribute to achieving the opportunity?" When thinking about your ability to influence you may consider such things as your current skills and knowledge, your role in the team/organisation and your level of influence within the organisation. Score the level of influence from 0 to 10 (0 = no ability to influence, 5 = some ability to influence, 10 = high ability to influence) and record the scores for each opportunity in the 'Influence' column.
5. Plot your scores for each opportunity on the graph provided. Mark the score for each opportunity with a dot or cross and write the number of the opportunity beside it. It is possible that more than one opportunity will have the same scores. If this happens, record the numbers of all the opportunities with that score beside the dot or cross.

6. Consider the opportunities that fall in the top, right hand quadrant of the graph. That is, those opportunities that have scores of greater than 5 for both 'Impact' and 'Influence'. If there are a lot of opportunities in this quadrant draw another set of 'crosshairs' through 7 or 8 on the graph and consider those options that fall in this further top, right hand quadrant.
7. Identify and highlight those opportunities with high scores for both 'Impact' and 'Influence'.

Opportunity	Impact (0 – 10)	Influence (0-10)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



**Figure 1. The Impact and Influence tool for assessing opportunities**

When using the tool in groups we are always careful not to fall into the trap of using 'average' scores to come to a rapid 'group decision' about the highest priority opportunities. Often at times it is important to see both the spread of scores as well as the average. The thinking, insights and shared understanding stimulated by discussing broadly differing scores can be very powerful. Similarly, a large group seeing significant commonality of scores can cement commitment to the highest priority opportunities and to not taking action on lower priority ones.

### The Eight Dimensions Tool

Once those opportunities with high scores for both 'Impact' and 'Influence' have been identified we can put these opportunities through a further 'sieve' using the Eight Dimensions Tool. The tool uses eight different criteria to assess opportunities. The thinking behind this is that opportunities need to be assessed not only in terms of impact, but also in terms of the person or team who will be implementing the opportunity.

The eight criteria are:

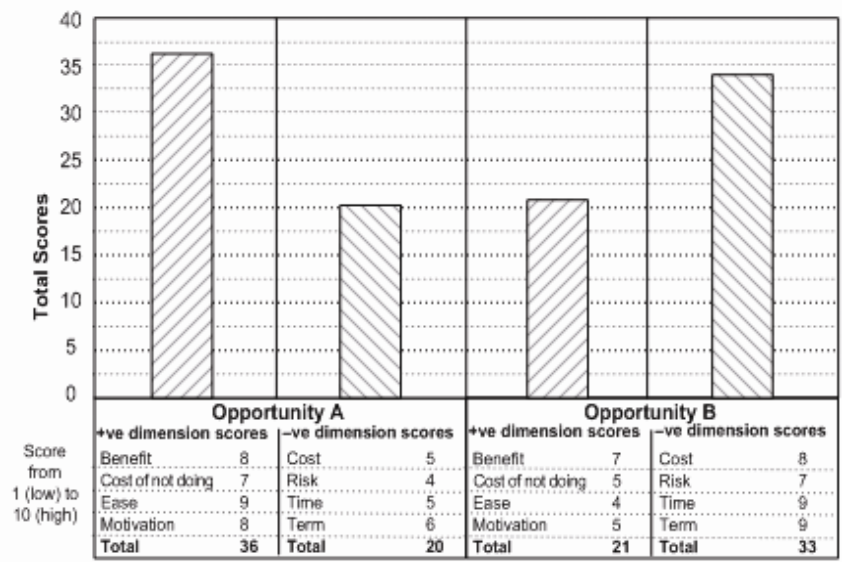
1. Benefit — expected value from implementing the opportunity
2. Cost of not doing — undesirable consequences if the option is not implemented
3. Ease — how easy it will be to implement the opportunity
4. Motivation — enthusiasm for implementing the opportunity
5. Cost — resources (other than time) needed to implement the opportunity

6. Risk — likelihood of undesirable consequences as a result of implementing the opportunity
7. Time — length of time needed to implement the option
8. Term — length of time between implementing the opportunity and seeing the benefit.

Figures 2 and 3 show two versions of the Eight Dimensions Tool — the Bar Graph Version and the Pin Wheel Version. The Bar Graph Version is good for quickly assessing whether one opportunity is a 'better' choice than other opportunities. The Pin Wheel Version is good for comparing opportunities and assessing how the chosen opportunities will need to be managed to ensure successful implementation.

The steps to follow in using the Bar Graph Version of the Eight Dimensions Tool are:

1. For each opportunity, consider each of the eight criteria and mark your scores for each in the table at the bottom of the graph (1 = low, 10 = high).
2. Add up the scores for the 'positive' or 'helping' dimensions and for the 'negative' or 'hindering' dimensions. Write these scores in the bottom row of the table.
3. Draw a bar graph to represent the 'positive' and 'negative' dimensions for each opportunity and compare these.
4. Consider the graph of your scores. Sometimes it will be obvious which options to implement because you have given them high scores for the positive, or helping, criteria (motivation, benefit, ease and cost of not doing), and low scores for the negative, or hindering, criteria (term, risk, time and cost). At other times it will be less clear. If several team members are all using the eight dimensions tool, you may find that there is consensus on some criteria, but widely differing scores for others. Discuss these variations, and you may find quite different assumptions and perspectives, which will help to advance your thinking.
5. After considering the graphs and scores select the opportunities you will take forward to action. If the bar graph doesn't help you to reach a decision, you may find the pinwheel view gives you a different perspective.
6. If you need to explain or share your decision with others it can be very useful to make a few notes against each criteria to help them understand your assessment and the assumptions you made when doing it.

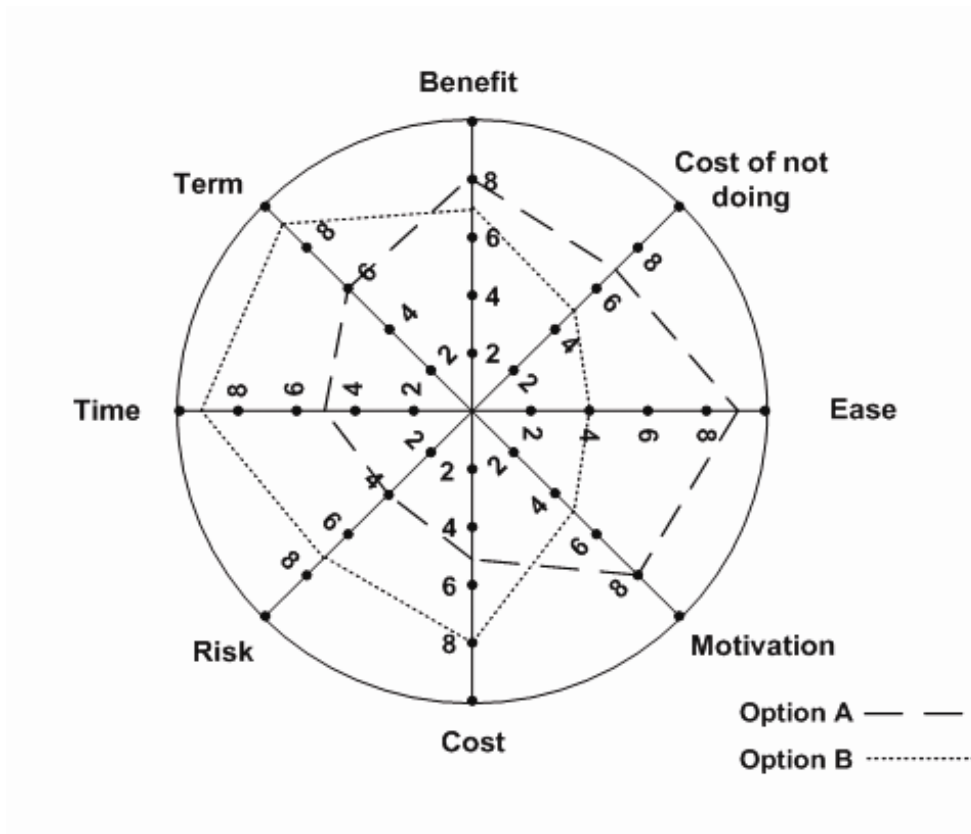


**Figure 2. The Eight Dimensions Tool — Bar Graph Version**

The steps to follow in using the Pin Wheel Version of the Eight Dimensions Tool are:

1. For each opportunity, consider each of the eight criteria and mark your scores for each criteria from 1 to 10 on the 'wheel' (1 = low, 10 = high).
2. Join the scores for each opportunity using a different colour or style of line for each one so that you can distinguish between the different options. Include a small legend to show which type of line represents which opportunity.
3. Consider the shapes created by joining the scores. Sometimes it will be obvious which options are more likely to be implemented because you have given them high scores for motivation, benefit, ease and cost of not doing, and low scores for term, risk, time and cost. Sometimes it will be less clear from the shapes created which opportunity to select. For example, you may have an option that has high scores for 'benefit' and 'cost of not doing', but low scores for 'motivation' and 'ease'. You may still choose to take this option forward to action, but at least you know it won't be easy and low motivation will be an issue. For this option you may put in place strategies like a 'critical friend' or support team to make it more likely that you can implement the opportunity successfully.
4. After considering the shapes created and the implications of these shapes for implementation of the different opportunities, select the opportunity or opportunities you will take forward to action.
5. If you need to explain or share your decision with others it can be very useful to make a few notes against each criteria to help them understand your assessment and the assumptions you made when doing it.

As with the Impact and Influence Tool, when using the Eight Dimensions Tool in groups we are always careful not to fall into the trap of using 'average' scores to come to a rapid 'group decisions'. The thinking, insights and shared understanding stimulated by discussing broadly differing scores can be very powerful.



**Figure 3. The Eight Dimensions Tool — Pin Wheel Version**

### Conclusion

The more experience you have with selecting and using tools, the better placed you will be to start designing your own tools. And with more practice tool design becomes easier and you can become more adventurous in the type of tools you design, always keeping in mind that good tools are created for a purpose, not for the sake of creating tools. For example, ‘games’ can be challenging to design, but are often very effective in stimulating thinking and interaction, and for developing shared understanding of key concepts in a group. One key principle that we firmly believe in and which we would like to leave you with is this: “If we wouldn’t and don’t use a tool ourselves, we don’t inflict it on others!”

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