

Visual Strategizing

The Systematic Use of Visualization in the Strategic-Planning Process

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This article shows how visualization can be used in the strategic-planning process, by examining the use of real-time, interactive visual representations in the business strategy process. Starting with a concise review of literature, we postulate that visualization can improve the quality of the strategic planning process by addressing many of its cognitive, social, and emotional challenges. We develop a conceptual framework for strategy visualization, and use this structure to group and position interactive visual representations of information along the strategic-planning process. We highlight the benefits of visual methods for strategizing, and illustrate them with five case studies covering the entire strategizing process from analysis to implementation. The cases also highlight the use of visualization at different organizational levels, and we consider some of the challenges involved in employing graphic means in strategy work, and how to address them. We highlight resulting risks and practices for visual strategizing and articulate a research agenda for this emergent domain. The key lesson for executives is that visualization should not just be seen as an attractive way to communicate strategic planning process outcomes and monitor its progress, but as a powerful process enabler that can enable strategizing as a joint managerial practice – if facilitated properly. Visualization is, however, a double edged sword and we present several caveats that need to be considered in its application in the strategy context.

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Introduction

Strategic planning processes are among the most demanding tasks that managers face in today's complex market place. It can be an overwhelming challenge to take into account, simultaneously, the developments of technologies and societal trends, the behaviour of competitors, customers and regulators, all within a changing legal, environmental and financial framework. When this is compounded with time pressures, market uncertainty and constant distractions and internal tensions, making sound and

sustainable strategic decisions becomes an immense challenge. This task is made even more difficult by the subsequent need to communicate, implement and monitor these decisions in a systematic, orchestrated and disciplined manner. Taken together, these activities pose numerous *cognitive* (e.g. information overload), *social* (e.g. co-ordinating multiple groups and hierarchic levels) and *emotional* (e.g. achieving staff buy-in) challenges for a business manager.¹ However, visualization — the graphic representation of data, information and knowledge — can offer significant advantages in each of these three dimensions.

Strategic planning processes pose numerous cognitive, social and emotional challenges for the business manager.

The relationships between the key challenges in the strategy process and the advantages made possible by visualization are summarised in Table 1, which indicates the potential benefits that methods employing graphic representations of strategic content can offer the strategizing process. We have chosen to distinguish between challenges related to managerial *thinking* (cognitive challenges), managerial *communication* and *coordination* (social challenges), and the managers' ability to *motivate* and *engage* their peers and employees (emotional challenges), as we believe these categories represent the major activities involved in the strategy process. Table 1 shows for which types of strategy challenges (as documented in the literature²) visualization can probably provide which sorts of value (as documented in seminal visualization studies³). The cognitive benefits of visual representations include facilitating elicitation and synthesis of information, enabling new perspectives to allow better, more exhaustive comparisons and facilitating easier recall and sequencing; the social benefits include integrating different perspectives, assisting mutual understanding, and supporting coordination between people; and finally the emotional benefits include creating involvement and engagement, providing inspiration, and providing convincing communication.

These advantages will be further systemized in the conceptual framework developed in the next section. Of course, achieving them depends on the proper use and application of visualization during strategic planning, an issue we address in subsequent sections of this article.

Although both the challenges of strategising and the benefits of visualization are well established in their respective fields, we know of no previous comprehensive attempt to bring them together. Our contribution, therefore, is: firstly to draw on these two bodies of literature to develop a framework for visualization in the strategic planning process; secondly, to illustrate the value of the framework by showing examples of how visualizations work successfully in strategic planning practice; and finally to identify both challenges to be overcome and good practices to be adopted in the continuing development of strategy visualization.

The remainder of our article is structured as follows. After first synthesising a framework for visualization in the strategy process from the literature, we then describe the application of visual techniques to strategizing in five case studies, chosen to illustrate all aspects of the framework. We next conduct a cross case analysis of our studies, from which we present common challenges (and their solutions) as well as emerging practices in the use of visual methods of strategizing. We conclude the article by summarizing implications for practice and for academia.

Developing a framework for visualization in the strategic planning process

Having suggested in the previous section the benefits that visualization can provide for the process of developing and deploying a business strategy, we now examine more closely at *which points of the strategy process* visualization can be most effectively employed. We start by taking a generic strategy process, characterised by four stages - analysis, development, planning and implementation — and, by synthesising the results of the literature review presented above, consider how visualization can support looking at the main activity at each stage.

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