

# HISTORICAL ANALYSIS

This is the first of five worksheets in the 4 Steps model. What happened in the past? What drove change?

**1** What Happened?

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*What were the noteworthy events and headlines in this history?*

50 years ago      25 years ago      5 years ago

**2** What Changed?

DAILY LIFE

*Daily practices, experiences, and expectations*

SYSTEMS

*Infrastructure, Institutions, and Rules*

VALUES

*Values, Narratives, and Deep Assumptions*

**3** Why Did Those Changes Happen?

- New Science and Tech
- Conflict & Competition
- New Ideas and Values
- Chance
- Other



We'll call these causes our **Historical Drivers** of change.

# TRENDS, EMERGING ISSUES, AND STABILITIES

Together our Trends and Emerging issues are what we'll call our **New Drivers** of change.

## 1 Trends

What are some of the trends that are currently driving change? Identify both trends that are going up as well as those that are headed down.

Think about *counter* trends that are being provoked as a result of these initial trends.

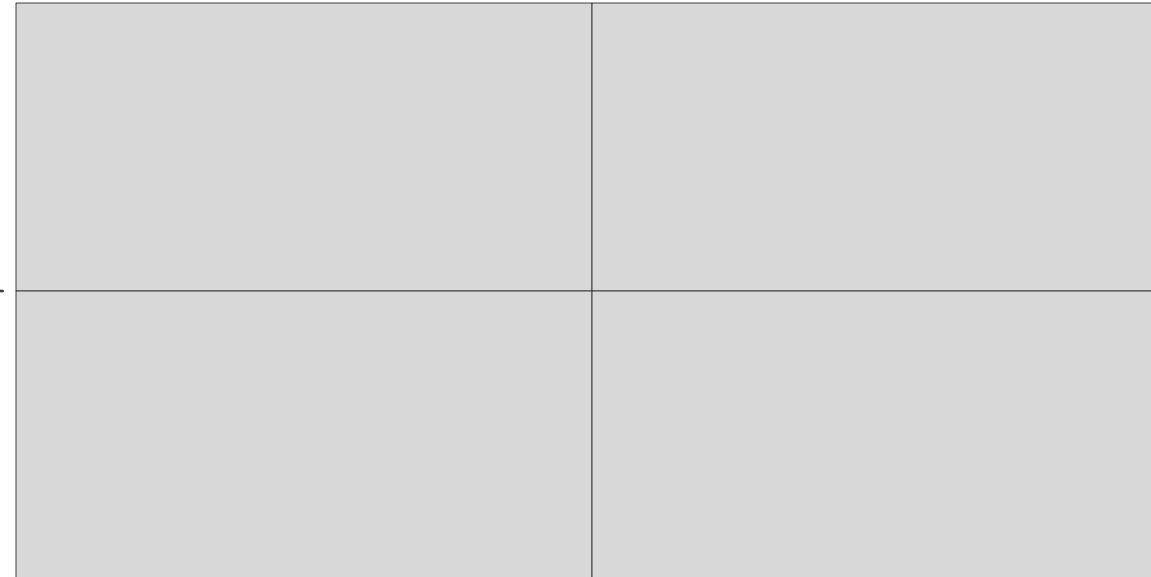
Increasing Trends



Decreasing Trends

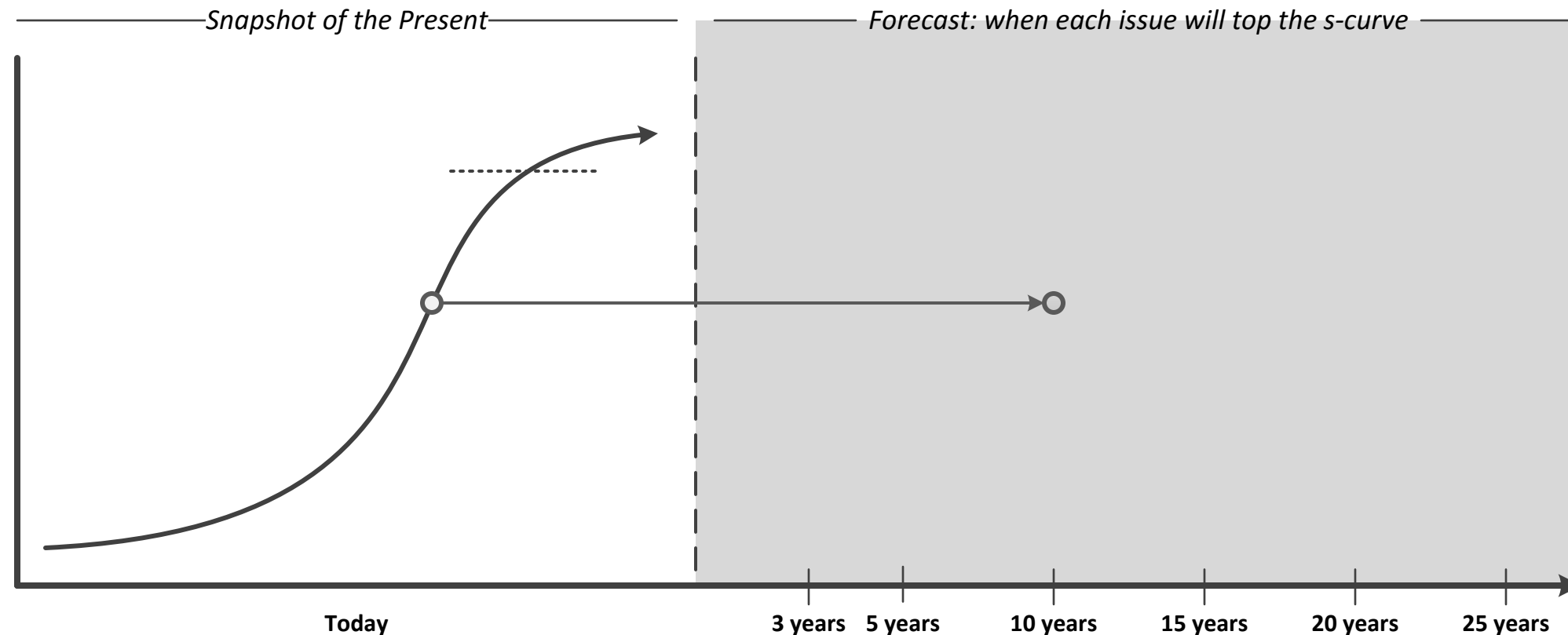
Driving Change

2 Counter Trends

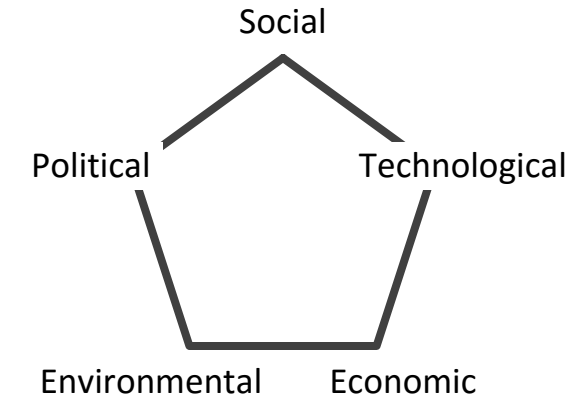


## 3 Emerging Issues

What new ideas, issues, or technologies are below the radar now, but might mature into important drivers of change?



## 4 Steps to the Future Worksheet 2



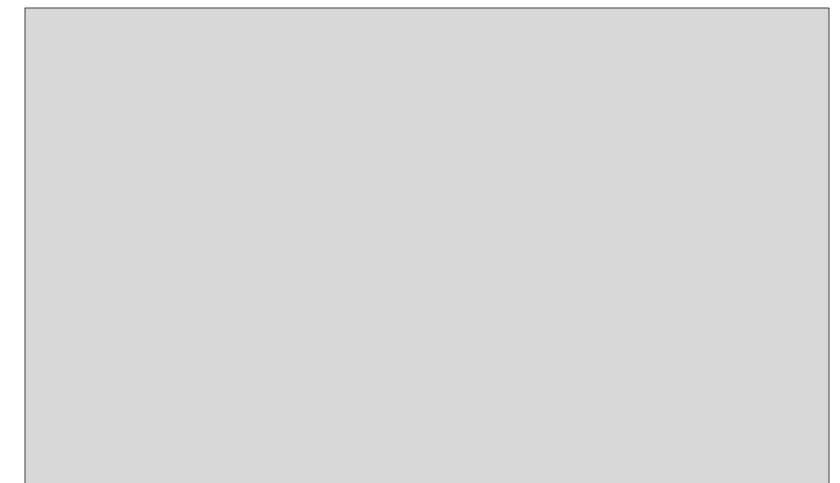
The STEEP framework.

## 4 Stabilities

What things will slow or prevent change? We'll call these our **Stabilities**.

Common types of stability-enforcing things:

- Rules, customs, and traditions
- Physical or logistical constraints
- Patterns of behavior
- Powerful stakeholders or incumbents



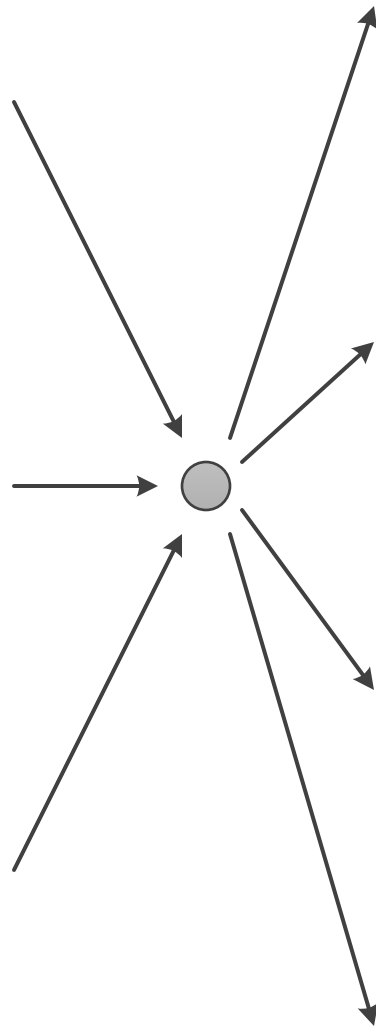
# SCENARIOS

1 What is the Focal Issue?

2 Historical Drivers of change

New Drivers of change

Stabilities



3 What combinations of Drivers and Stabilities would create these scenarios?

Scenario A: \_\_\_\_\_

*Combinations*

Scenario B: \_\_\_\_\_

*Combinations*

Scenario C: \_\_\_\_\_

*Combinations*

Scenario D: \_\_\_\_\_

*Combinations*

4 What would the resulting scenarios look like? Describe how life is different at each level.

Daily Experience	Systems	Values

Daily Experience	Systems	Values

Daily Experience	Systems	Values

Daily Experience	Systems	Values

Scenario: \_\_\_\_\_ (one per scenario)

### 1 Reacting

There are three different basic reactions to the prospect of change: those who want to resist the changes; those who accept that change is coming and want to channel it according to their values; and those who want to accelerate or amplify the changes. How would various stakeholders respond to this scenario? In this scenario, who becomes an ally and who becomes a policy or strategy competitor?

#### *Resistors*

Current
Future

#### *Channelers*

Current
Future

#### *Accelerators*

Current
Future

### 2 Assessing

What new products or markets open up to you in this scenario? What new strategies would be successful? How would existing or proposed strategies fair in this scenario?

#### Goals

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#### Strategies

Wind tunnel existing or proposed strategy
Ideas for new strategy

#### Products/Services

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### 3 Monitoring

What headlines would tell you the world was heading in this direction?

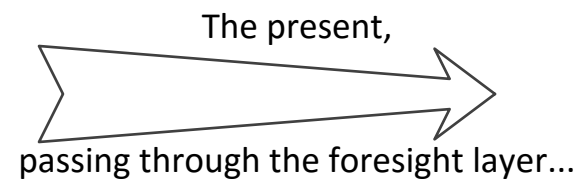
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# VISIONING

Vision: "An articulation of the organization's preferred future, informed by purpose, foresight, and aspiration."

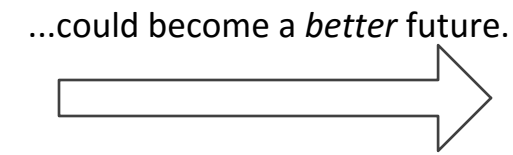
**2 The Present:**  
List the five most important characteristics of the present.

- 1.
- 2.
- 3.
- 4.
- 5.



**3 Foresight:**  
Write down some of the insights captured in Worksheets 1 – 4.

- 1.
- 2.
- 3.
- 4.
- 5.



**4 Your Preferred Future:**  
List five of the most important characteristics of a better future.

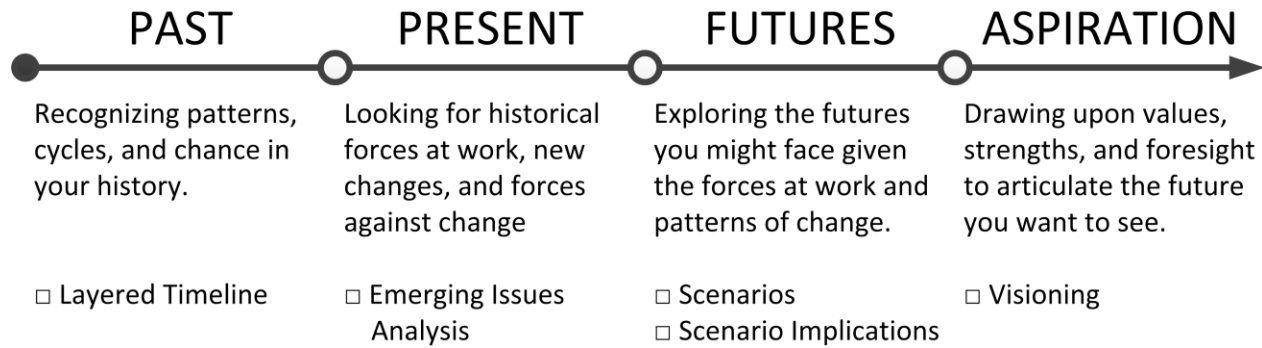
- 1.
- 2.
- 3.
- 4.
- 5.

**1 Strengths & Successes:**  
List the five most important strengths from your organization's history to carry into the future.

- 1.
- 2.
- 3.
- 4.
- 5.

## Visualizing Your Preferred Futures

Use this space to draw your preferred future. Stick figures, icons, diagrams, pasted magazine clippings, or panoramic drawings!



## 4 Steps to the Future

### 1. Past

- How has [your issue] changed over the last several years?
- Why did those changes happen?

### 2. Present

- Which of those forces are at work again?
- What new sources of change?

### 3. Futures

- What are the logical alternative futures for [your issue]?
- What are the opportunities or threats?
- Who will resist, channel, or accelerate change?

### 4. Aspiration

- What new goals?
- What new vision?

## Principles

- The future does not exist (we're all helping to create it)
- There are many possible futures
- Those futures are constantly in flux

## Everyday Habits

- Expose yourself to lots of stuff
- Break out of bounds
- Think (and take notes) visually
- Keep asking *why*?
- Prompt others to reconsider *what if*?

## Ground Rules for the 4 Steps

- Stop trying to hit the bull's-eye
- Keep numbers in their place
- Collect lots of stuff
- Be ruthless with expectations
- Take everyone's input
- Do this every year
- In fact, do a little bit of this all the time