# A Process of Search and Discovery

One output of Mesopartner's work in bringing theory and practice around complexity and development together is the Systemic Insight process logic. It presents an outline for a process of continuous discovery and learning that can be applied in a great variety of settings – from individuals to teams to whole organisations exploring ways to achieve change in a complex setting. The process presents an alternative to linear processes of planning and execution, which are not able to respond to the uncertainty and complexity many teams and organisations face nowadays. The process is based on principles and ideas of intervening in complex systems. It embraces the paradigm of complexity thinking and human sensemaking.

The process proposes five elements (see Figure 1): hypotheses, diagnosis, making sense, strategic intent and intervention. Additionally, learning and adjusting integrate elements throughout all the phases. We have chosen the term "elements" to highlight the fact that these different points in the model signify a change of emphasis, a change of intensity or perhaps a different mode of working, in contrast to a progression of distinct steps or phases. The sequence we propose is merely a way to explain our logic, as language is by nature sequential. In reality, however, many things happen at the same time, and thus our work needs to adapt and be done in sequential, parallel or iterative ways, depending on the context. Activities in a complex system cannot follow a predetermined sequence but need to answer to the dynamics in the team and the context. Flexibility is needed to adapt every element to the realities in and around the project. Nevertheless, the suggested process guides a team in their work as it outlines the important questions one needs to be aware of continuously.
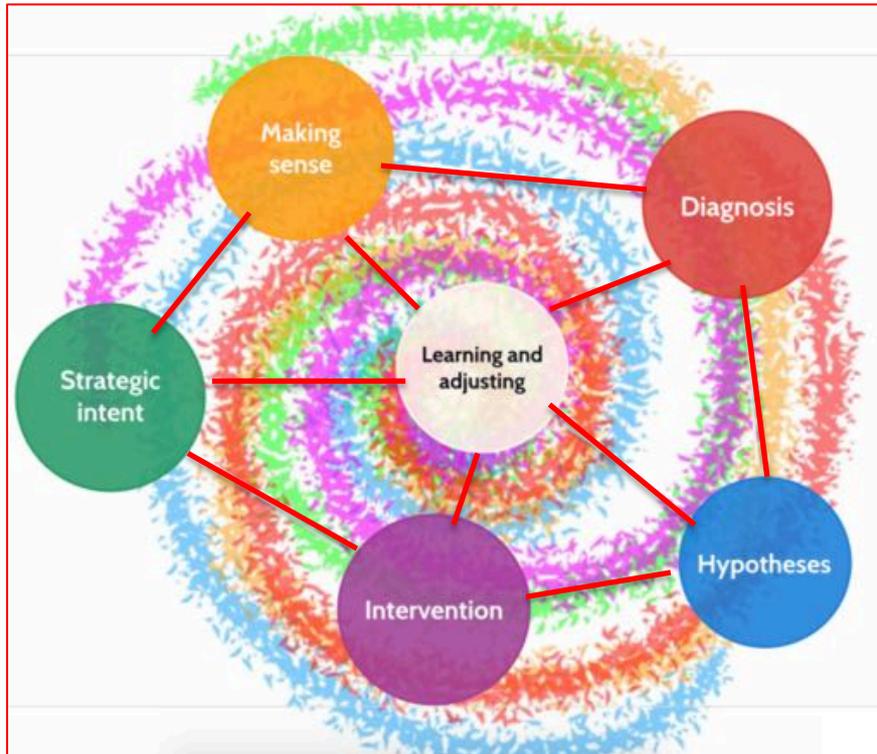


Figure 1: Overview of the process of continuous search and discovery

In the following, we describe the different elements from the view of an individual team. The logic should, however, also be applied when working with possible partners and the key influencers.

## Hypotheses

Hypothesis formulation is an important phase as it sensitises the team working on complex change to their own bias and to different perspectives. The different perspectives of what shapes the current behaviour of the system need to be captured, as well as the system's historic path that has led to the current situation. The collected hypotheses represent the team members' world views on how they assume the world works and what makes it change. Different stakeholders might have different perspectives and thus different ways of looking at the world. Our world views shape our preferences in terms of how data and observations are interpreted and how interventions are shaped.

Beyond the team, it is crucial to understand the different perspectives of predominant stakeholders, as they will shape how the stakeholders react to interventions. There is, however, no need for alignment of perspectives within the team or among stakeholders. On the contrary, it is beneficial to find a diversity of views on the situation as this potentially leads to greater variation in the design of interventions. The team needs to find a way to handle divergent perspectives in a constructive way.

## Diagnosis

Diagnosis is not a delimited step in a process but an on-going sensing of what is happening in the system. There are aspects of the system a team needs to understand: who are the main actors, what are opportunities and constraints, and importantly, what are the dynamics of the system, i.e. the predominant patterns of behaviour. To collect relevant data, several analytical instruments can be used in sequence or in parallel. Each analytical instrument draws on different theories and knowledge bases, all of which have their own bias or perspective. Therefore, combining different analytical instruments provides a greater in-depth diagnosis that allows teams to consider how factors affect each other.

It is important to be aware that it is impossible to form a complete picture of what exactly is going on through extensive analysis. We are usually confronted with the fact that different stakeholders interpret findings in different ways, which in turn affects their behaviour, appetite for risk or change, and their willingness to cooperate in improvement activities.

## Making sense

As described above, a team is continuously sensing what is going on in the system and its elements using a variety of different instruments. However, we found that continuous analysis alone does not guarantee that the systemic patterns are well understood. Indeed, analytical approaches often focus on individual parts of the system, such as a value chain, a sub-sector or a specific group of people. This ignores the interaction of the parts and teams struggle to find overarching and repeating patterns. An effort is necessary to make sense of the relationships between the elements and the system and the interactions between the elements.

Deliberation of the deeper forces at work in the system might necessitate changes in our view on the system or additional analysis to generate more data. For example, we may realise that the conceptual boundaries that we drew around our system were too narrow or

too wide. Or we may realise that a certain pattern has emerged, but we cannot understand what triggered it and what the broader impact of the pattern is.

Care must be taken not to get stuck in a never-ending loop between diagnosis and making sense. While we must endeavour to gain an in-depth understanding of the system, complex systems can only really be understood when one interacts with them. It may be necessary to determine when we need additional analysis before we proceed, and when we are better off carrying out analysis and sensemaking while we are already implementing some activities.

## Strategic intent

In a traditional approach to strategy, an idealised future state is developed – the gap between the current situation and the future state is closed by implementing a detailed plan that requires full alignment of all stakeholders.

There is a wide appreciation, however, that we cannot predict the future in a complex adaptive system. Rather than developing a detailed ideal future and plan how to get there, our process suggests focusing on changing the evolutionary path of the system by managing the present.

To do that, a coherent response of the stakeholders to is necessary. Consequently, the aim of the strategic intent is to give the involved actors a sense of direction. It is not the intention to get everybody to implement the same activities, which would make success less likely and make the system less resilient. Rather, the strategic intent should allow for diversity and a variety of responses, while ensuring that everybody is pulling in a similar direction.

## Intervention

Complex situations are marked by a high degree of uncertainty about how the situation can evolve over time and what forces are predominantly shaping the system. No single actor in the system has the capacity to change the overall patterns. Coordinated action is needed. There are different ways to intervene in complex situations, and we propose three types of intervention:

1. *Incremental* interventions start a process of changing the behaviour of actors in the system by taking small, simple to implement steps using resources over which the stakeholders have control. The activities should be visible and easy to communicate. The activities should start soon after planning them. These interventions are sometimes also called "quick wins".
2. *Safe-to-fail* experiments lay the foundation of an evolutionary intervention design. Experiments can lead to a better understanding of what works and inform the selection or adaptation of interventions down the line. Experiments need to be designed in a way that allows them to fail safely, i.e. without risking the health of the whole endeavour or harming the actors involved. The experiments therefore need to be small, but still large enough to have a meaningful effect.
3. *Failsafe* interventions aim to change tangible constraints in the system, and thus potentially have a large-scale impact. These types of intervention need bigger budgets and take a longer time. They require a project structure and management. It is important that this approach is used for interventions that indeed can be planned and managed, such as establishing physical infrastructure.

The mix of interventions is likely to change and evolve over time based on what works in the real world and how. It is important to test various diverging hypotheses that have been

collected within the team or the larger group of stakeholders by using safe-to-fail experiments.

In situations where it is not feasible to achieve change, a *graceful exit* is advisable. If we see that we cannot change anything in the strategy of the organisations we work with, we should exit gracefully to avoid the complete failure of our initiative by focusing on other routes for change.

## Learning and adjusting

Learning and adjusting is a continuous mode of operation. Learning provides the insights that lead a team to change emphasis and adapt. Learning and adjustments happen continuously. When formulating hypotheses, the different stakeholders can learn about different perspectives in the system and assumptions that are made explicit by their peers. While diagnosing the system, learning is based on the findings of the various analyses. Learning also occurs through making sense of all the different observation and data we have gathered and the experiences we have gained. When formulating a strategic intent, learning helps to evolve the planning and intervention strategy. As complex systems cannot be understood by analysing them but only when interacting with them, the intervention phase is the most important phase in which to learn about how the system works. Hence, interventions need to be designed in a way so their effects can be observed.

Short learning loops lead to immediate adjustment of emphasis, while longer cycles of learning can inform the intervention portfolio and the strategic intent. Learning is the glue that binds all the activities and the generated knowledge together (red lines in Figure 1).

The process of exploration requires creativity in responding to the context. The team must be creative in drawing heterogeneous stakeholders into the diagnosis and the strategy. Not all stakeholders will understand or appreciate the necessity of drawing in dissenting views and contrary ideas, as stakeholders often value conformity and coordination more than experimentation and alternative approaches. To overcome this is the task of the facilitator.

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