

JuliusProcess, towards an alternative for systemic integration for the strategic consultancy process

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Abstract

The intention of this paper is to incorporate system thinking actively to the Strategic and Organizational consultant process and to create a basic framework for the use of smart software that will allow us to accelerate the learning and decision-making process.

Our approach through JuliusProcess is to make a basic analogy between the evolution of strategic planning process and system thinking, as it shows below:

*JuliusCrisis → **Event** JuliusOperational → **Pattern** JuliusStrategy → **Structural***

>From this point of view, the executive must be encouraged to move from event oriented decision making to pattern oriented decision making and finally to transfer the knowledge that will allow him to acquire the mental model of structural decision making process.

The JuliusProcess is oriented to all kinds of organization, from business to non profit institutions, they all have the same problems, with variables that have different names but have the same behavior, we refer to systems archetypes.

1.- Introduction

As a team of professionals, entrepreneurs and consulting group, we have had difficulties due to the isolated way in which are currently approached the processes that involve the entrepreneurial work in the field of the strategic consultancy, and that show strong biases and individualities that are originated from obsolete methodologies or from given ideas of current Guru's that influence the advisory techniques that makes pressure on the consultant to be involved in order to show that he is up to date on these new methodologies.

It has been also observed, how the consultant, begins in an involuntary way to be specialized in given strategic processes and tends to carry all their proposals toward the area in which he is stronger and not necessarily to the consultancy process that actually requires the organization.

The entrepreneur or the organization executives do not have the time to investigate in these fields, remaining abandoned and delivered totally to these new models of the knowledge and not having opposite arguments, is delivered to this advisory experiment, that in given cases can be successful and in other are not observed large changes in the organizational performance and regrettably in other, the organization remains worse than before.

Repetitive processes

The same as the methodology that uses a medical specialist, an organizational analysis system must necessarily be standardized, in such a way of assuring a process of quality in its implementation. We find ourselves then, in the case of the Consultancy Market Offer in Chile, we have been able to see that in front to a same company, various consultant without a previous contact between them, would have a different approach, and with different proposals for the current problem. This does not mean that for a same phenomenon there exists an exclusive and only one solution, to the contrary, assorted solutions exists, but only a few will be those that call to the commitment of implementing it and that gives a structural solution to the system, in which most of the cases the approach is concentrated on the symptoms and with short term solutions, delaying from the right and definitive solution.

In front of this, our proposition, as a first step, it is to approach the strategic consultancy field, without setting aside the necessary creativity, inspiration and flexibility of the consulting art, beginning with an integrative methodology of various software that Julius S.A. Consultant Group has been using in their current projects, that allows to develop a referential structure to facilitate the labor of our consulting job and to generate a prompt previous communication with our potential clients.

There exists various processes that are repetitive in the field of the consultancy and that can be optimized through the use of computerized tools. Contrarily to what is thought, behind them, there exists a high technological-based academic and practical knowledge. This will replace somehow the detailed personal job of the consultant, but it will empower and enable them to do a much wiser and efficient job to their clients.

Need for an accelerated learning process

The complexity of the current world, the transculturalization, the global communications, have made the organizational environment something complex and difficult to quantify. Due to this, it is required more knowledge, a continuously learning process and an open mind for change.

But in practice, it is impossible to acquire for oneself, all the available information and new published theories made by the current Guru's or successful experiences applied in various companies, because when one has ended the specialization in a specific discipline, this has, already been found obsolete by a better theory that already has been started to be applicable in a effective way at organizations. For example, an MBA degree taken 10 years ago, can be found somehow obsolete, and can be proven upon analyzing the contents of its programs that make mention to the transferred theories in that period, many of those which no longer fit for the near future.

The challenge that present the new software generation for the strategic facilitation, is that they are competitive between them, they contain a great knowledge, their applications are increasingly effective and their learning is extremely fast and intuitive, and trough this learning process one has acquire a complete and new kind of knowledge, without having to attend to a formal classroom or course. For example, the case of a Software that we currently work on, named AliahThink, includes in their technologies the theory of the Portfolio of the Boston Consulting Group, with General Electric Matrix, and that automates, in a brilliant way, the description of the

positioning of the products or services of a company in the market, and allows to define the degree of attractiveness that certain segments present to the company, process that if it was to be made manually, it might have taken months in learning the process and with a highly cost for the company. But this software with its complementary templates (Aliah Listen, Aliah Plan, etc) only give a partial view of the system.

To this, can be added other softwares as for example Simplex and MindMan, that have carried the theory to practice in a fast way, allowing the consultant to acquire new knowledge in an exceptionally short period and to the client, accelerate the learning process and to strengthen his capacity of decision making. Now then, these software, in most of the cases, are isolated between them, many authors do not know the existence of the counterpart, despite they are complementary systems and that they can be combined for strategic management and consultancy.

Need of coherence and soundness

When word coherence is outlined, it indicates the need for a logical process and with continuity when doing consultancy, in such a way that the consultant project wont be in an isolated context, but rather be a part of an integral advisory system, otherwise, the efforts will be lost in time, giving as a result the discontinuity of the entrepreneurial modernization efficiency. The strategic consultancy process should be coherent and not isolated, self sustained and dynamic.

Need of flexibility

Flexibility, is indicated as the adjustment capacity to the entrepreneurial dynamics, that should not be framed in an implementation process of the solutions in neither strict or imposed way, but rather it must co-operate to deliver to the entrepreneur a more systemic vision of its organization and environment, but not to impose it.

A perfect planning does not assure a perfect solution, since to the contrary of an architectural design process that considers their structural parts as something static, the structures of a social system always are in movement, in process of adjustment and change, therefore the design of a strategy, becomes a reference framework that should be modified if the system has changed.

Need for a System Thinking View

To encourage Companies, Organizations and Entities that do not know the System Thinking Discipline, implies an incremental approach, from a day to day practical language, from the daily need to have immediate results towards, specially in occident, the attitude of being aware that its organization is a living system, in which there are many variables that influences and reinforce its behavior. As the executive has an event response model towards the variables that influence the system, he has to be empowered to have a mind shift to patterns and finally to structural response model.

Need for permanent use of the plans and continuous update

Most strategic plans, development plans, new projects, etc, remain obsolete in nice shelves due to the high cost of re-doing and updating them. The automated approach that will be explained, allows any company to have an on-line “alive” strategic plans, incorporating the company vision, mission, goals, tasks, responsible, etc.

2. - Automated Methodologies applied by Julius S.A. Consulting Group

We have had the luck of possessing a curiosity that has allowed us to test an assorted range of software and to evaluate in global and complementary way what is needed for solving real problems at different organizations, having good results in the problems solving and implementation process of entrepreneurial strategies to our clients. These software have been fruit of a previous experience of many worldwide consultants, entrepreneurs and academic professionals that have visualized the way of automating determined intellectual processes through easy and practical computer software.

JuliusProcess

The consultancy framework developed by Julius S.A. involves a sequence of activities supported by modern techniques of analyses and diagnoses that are scientifically guided, in a way to obtain a consistent result with the current reality of the Company, giving at the end of the process, concrete and applicable proposals. All this work should be made in an inductive framework, that will generate a committed and determined attitude of the participants that are involved, focused to privileged the adoption of the right and pertinent decisions that will help to succeed in the working plan developed during the consultant sessions.

We do not pretend to be the owners of the process by itself, that originally comes from professional software for decision making, available trough internet and specialized markets. All what we have done is to investigate, use and integrate each one of them to solve global problems of the firm. We believe that trough the time there will be an incremental availability of these kinds of smart software, that need to be integrated, so this is a first step for giving a basic road map of how one can incorporate in the organizational process these technologies under a system thinking philosophy, believing that this work should be reviewed and complemented in the future by all the parties, System Thinkers, Software Developers, Strategic Planning Consultant and of course the Clients.

The explanation of each software is a short interpretation of ideas and process that comes from their own manual and help files that will be identified with their original name, and as we said, we do not pretend to invent the wheel, just to align these individual efforts and to use them as tools in different processes that we have mapped as logical steps and try to make the first steps to encourage the future automation of these software in a common shell, under the System Thinking Vision.

The Julius Process will help to

- a) Define the current situation
- b) Define where do you want to be
- c) Define index or measurements of performance
- d) GAP definition
- e) Organizational accountability
- f) Roles Definition
- g) Values Definition
- h) Vision Definition for every Role
- i) Global Vision and Mission
- j) Goals, sub goals, task and activities

3. - JuliusIntegrator

JuliusIntegrator is the process that integrates different software in one coherent consultant process. For our vision, we need to develop a strong software environment that will allow articulating the processes that will be named further on.

To build a global software, depending on what you want to assess, lets say organizational climate, marketing, sales, etc, we have to build up a theoretical model, that should consider all the processes that are included in that system, and all the available software for all the sub processes. JuliusIntegrator, should be able to integrate different software, within one system, and once you use a software, lets say market analysis, from marketing plan, you have a data and graphical online capture interface, that copies in a rtf mode the information you are interested from the current process and then integrates that information in a global holistic report.

Also, the software should include the capacity to build automated formats, for questions and leaves necessary space to put the answers and then such answer should go to the report integrator. They are all separated software, but they will be integrated trough this software, named by us JuliusIntegrator. It will open up automatically the software that one needs and captures the process that needs to be incorporated into the reports and copies it with text, images and then finally will integrate all the processes in a whole report. This software should come with a minimum amount of basic processes allowing the system to work in basic performance (among others: simplex, mind map, ahp process, report wizard design) that should have an agreement with JuliusProcess. Also it will guide the user to plug-in other complementary software that the main engine can manage. The software will be multifunctional and multidiscipline where strategic planning process and system thinking is required.

- JuliusIntegrator, beginner's wizard will explain you the process
 - Will guide you trough the whole process
 - Will ask you what you can get from every process
 - Tells what software is available in the system
 - Tells what software is needed for each process
- Will define with the user what he wants to be included in the study s well as in the report document.

Currently, this project is being studied between Julius S.A. and Universidad Marítima de Chile, in Vina del Mar, Chile.

4. - JuliusTools

Inside of each process there can be included, one or more of the available softwares, which will be used as complementary tools. These softwares reflect only a small sample of many that already exist in the market, and probably with same or better performance than the ones that are exposed. The idea then, is to give a framework where one can add personal preferable software and integrate it in the proper process. Next, we will name and describe the different types of software that will be integrated in a whole process, called JuliusProcess.

AliahThink!, from Aliah Inc, is a tool that facilitates the strategic thinking technology consisting of methodologies and models for vision, strategy, planning, resource allocation, and problem solving. AliahTHINK modeling and strategic

thinking technology replaces the book on the shelf with a living model that can be easily updated as often as necessary to evaluate the impact of changes or potential changes in the business. The AliahSTRATEGY! Strategic planning methodology consists of four steps and an ongoing evaluation process. AliahTHINK incorporates an evaluation technology to measure your progress toward meeting your strategic objectives. You can evaluate each business unit and roll up the evaluation into a corporate summary evaluation.

Business Plan Pro, from Palo Alto Software, helps to write a business plan containing complete text, tables for forecasts and financial analysis, and business charts for illustrations. There are three modes in Business Plan Pro; Text Mode, Table Mode, and Chart Mode. The software provides useful help and instructions, plus examples for each topic in the business plan. Use the Table Mode to work with your pre-programmed and formatted financial statements. The business plan tables are built into the software, and are linked to each other as required for solid business analysis. The financial statements supplied are dependent upon your type of business and plan options.

Expert Choice, from Expert Choice Inc. is based on the Analytic Hierarchy Process (AHP), a methodology for decision-making. It provides users with the tools to construct decision frameworks from both routine and non-routine problems and ways to include value judgments in these decision frameworks. The Analytic Hierarchy Process (or more commonly known as AHP) is a framework for expressing priority and preference in decisions and problem solving. It provides a format for combining hard data with the opinions, feelings, preferences, and other intuitive judgments of experts into a comprehensive model for quantitative analysis. This approach allows you to incorporate both qualitative (emotional) and quantitative (raw data) factors into your decision-making/problem-solving process. This framework is used to organize all the relevant factors to solve a problem in a logical and systematic way, from the goal to the criteria to the sub criteria and so on down to the alternatives of a decision. The user must define the problem and enter all the relevant issues into the hierarchy.

Goal maker, from Access Able System Pty, is a software tool that helps to set, organize, explore, and achieve goals in all areas of the company and also the employees personal life. Using Goal Wizard one can create a compelling future. One can do this by thinking about what the company wants in terms of goals. One can explore each goal in detail, and notice and account for the effect a goal has on other areas of the company and the relationships between them as one plan for their achievement.

Project KickStart , from Experience in Software, INC, offers five easy automated methods for generating tasks for a project.

1. Identify your project's phases
2. State your project's goals
3. Learn from similar projects
4. Look at the project from other people's points of view
5. Consider the obstacles to your project's success

Marketing Plus, from Palo Alto Software, helps to develop a marketing plan in a creative process. A marketing plan is not a standard document. The process and results are different for different industries, and for different companies within an industry. No two marketing plans will ever be alike.

Marketing Plus gives a way to enhance the creativity with an organized methodology. A Task List will guide through the market planning tasks, including developing the strategy, market analysis, detailed budgeting, forecasts, and marketing plan texts.

MindManager, from MindJet LLC, allow large bodies of information and complex relationships to be rapidly communicated and understood. Just like brainstorming, is a creativity technique. It helps to the thoughts 'on to paper' in the order in which they occurred to you. One does not have to finish a particular train of thought.... One can jump ahead and come back to it later. Even though you might jump ahead, the Mind-Map-Technique helps you to keep a good, overall view of the problem. Additionally, the Mind Map aids ones thought processes by using graphical visualization on a single 'canvas'. One can inject new ideas into any part of this picture at any time.

The Brain, from Natrifical LLC is a easy-to-use visual interface integrates information from all different applications, allowing the freedom to think less about the computer and more about the decision making process. The mind works in a way that is unique to every human being, and The Brain lets organize the information in the same individual way, without limiting to a pre-determined file structure.

Simplex, from Helicon Systems Inc, is a process for finding and solving problems; identifying and overcoming challenges; and establishing and achieving goals. Use of Simplex allows individuals and organizations to be creative, innovative and to succeed in a world where fast-paced change is the order of the day. Simplex is a complete process of creative problem solving. This process consists of three stages: finding problems; developing creative solutions; and implementing your solutions. Each stage requires creativity of a different kind, and all three stages are necessary to allow creativity to work. The process provides a framework for using various tools. Simplex is represented as a wheel to reflect the circular, perennial nature of problem solving. Its eight steps include:

- problem finding,
- fact finding,
- problem defining,
- idea finding,
- evaluating and selecting,
- action planning,
- gaining acceptance, and
- taking action.

The "ninth" step is actually the first step of the next rotation of the wheel.

Powersim, from Powersim AS, helps organizations develop strategies and tactics through its simulation software and consulting expertise. Simulations allow users to evaluate strategies, practice business decisions and see the possible outcomes before committing resources. Powersim is designed to support a quantitative and experimental approach to management, using the system dynamics discipline.

5. - JuliusResolutor

This is the first fundamental step of the consultancy process, the identification of the different variables that have built the current organizational situation and the prioritization of future performance opportunities. In this step one must discriminate which is the real problem that the firm is going through and which consultancy process will be the most adequate to follow.

The first tool to be used in this step is the **Simplex Methodology**. Once the problem identification is ready, then we will create a decision model through the **AHP Methodology**. Once the mental model of the current situation has been captured, it will be drawn through the Software **MindMan**.

Finally, this process will be structured and framed through a fast planning session with the **Project KickStart** Software.

In general, in each of the processes the following steps should be considered:

- Development of solutions steps
- Development of tasks for each step
- Details of resources and people involved
- Schedule Definition

There must be pointed out that in the process **JuliusResolutor** there will be incorporated the logical steps that should be followed immediately in case that the client could be immersed in some kind of crisis and also those that should be met in the long term. Among the possible alternatives for the future consultancy modules that could be considered, depends on the of the current organization situation, that might be Crisis, Operational and Strategic circumstances.

This will be prioritize depending on the level of the executive's mental model:

JuliusCrisis —→ Solving the event, open loop thinking

JuliusOperational → Discovering the patterns, feedback loops

JuliusStrategy —→ Changing the structure, understanding the feedback and dynamic delays.

6. – JuliusCrisis

Event Level. Crisis is defined as the organization that has a problem that requires immediately attention and does not allow to visualize the company's future and to generate strategic conditions because the current situation that the firm is going through, and hides any possibility of present success. Given the conditions for the company to be considered in this scenario, it should be applied the process called JuliusCrisis, that will allow the company to be held in a virtual Intensive Care Unit.

JuliusCrisis has the objective to determine what elements of the organization are generating a crisis, in such a way to approach them in a quick way creating the necessary environment in the short term to generate a subsequent logical process, that ends in a Coherent and viable strategic Planning process.

Among these, there can be mentioned for example: Administrative disorder, financial failing, high debts, labor problems, etc. There exist many opportunities in those

organizations that have a deep root problem that is going to take time to implement a correct solution, however the current symptoms indicates that without letting visualizing the long term solution, immediate actions should be decided to minimize the current crisis, that will allow to focus thereafter with greater emphasis on the structural problem.

7. - JuliusOperational

Pattern Level. Technical or operational solutions should be interpreted as such initiatives that comes out directly from the company, that without having any urgent problem, they are consciously aware that there should be implemented specifically actions that will generate positive results in the medium term and that does not require a Strategic Planning Process, but concrete consultancy work.

These technical solutions can also be generated in a direct way from the JuliusCrisis or JuliusStrategy Process. Among these could be considered Financial Systems, Organizational Climate development, Marketing Strategies, Accounting Systems, Industrial Engineering, Environment Management Systems, etc.

8. - JuliusStrategy

Structural. These are strategic actions that will have a great impact on the future of the company. The decisions to be taken are supported by different types of processes that will give the company key insights about the future and how to react in front of different scenarios that will be developed. These decisions have to be well informed and integrated in a whole project.

This process includes in itself other processes that will help the organization to reach the desire future. For that, we must know what we want, what alternatives we have, what are our capabilities, how we have performed in the past, what are the changes in the environment, what changes might happen that could affect our company and how to deal with uncertainty. With that in hand we will be able to build a new future for he company, trough an Strategic Planning process that will be flexible enough to adapt by it self trough the chaos and complexity, and find out high leverage actions with minimum effort that will impact effectively the company's destiny.

Among this processes, there can be considered the next sub processes:

Julius Vision

A vision describes the ultimate goal, the highest dream. A strategy is a shared understanding about how that goal is to be reached. Translate the vision into a clear set of objectives. These objectives are then further translated into a system of performance measurement that effectively communicates a powerful, forward-looking, strategic focus to the entire organization.

An adequate vision of the most intimate entrepreneurial dream should be exposed and externalized, no matter how ambitious could seem, since it is the beginning of the focusing action. A vision will program our mind and will fix the concepts in the subconscious in which recalls like an emerging alarm remembering our dreams and forcing us to the action.

JuliusInductor

This process considers all the actions that are required to change the mental models of the individual or organizational system, and includes Simplex Methodology, GoalMaker and The Brain. The main purposes of this process is to get commitment for new actions and changes. This is an essential tool to help people and organization to change their underlying belief and empower them to make everlasting changes in their personal life and working places. It means that through workshops and personal conversations it is possible to envision a better future, changing the way we interpret the world and environment around us. What we feel and think about different things is the mental model that guides our daily decisions and reactions. To build a healthy organization, we must change their underlying belief models, this is where Neuro Linguistic Programming has a great power to induce commitment for change.

It seems that our decisions reflect what we really want in our lives, and what we really want may be incongruent with our stated, conscious goals. If we look at the results of our decisions, even those that are seemingly poor, we may find that those decisions accurately reflect our desires, our beliefs, our relationships and our Sense of Life.

JuliusLeverage

Systems thinking explains how the manager who appears to control the least, yet who understands the important interrelationships in an organization and can push the right leverage points, gets far more accomplished, in far less time. It can show how to dramatically reduce your "busy work" load by identifying and taking the few key actions that work with the systemic forces instead of fighting against them.

Systems thinking sounds complex, but it's really about creating simpler, wiser solutions. It helps you recognize the basic forces working behind all actions, people, and problems so you can stop wasting time repeatedly trying to fix the symptoms of the problem, and instead get to the heart of the matter—and create solutions that last.

JuliusProspective

This process involves the Future Studies Discipline that allows to determine the environmental changes considering the perspective of the 3 P, Possible futures, Probable Futures and Preferable Futures, in a way to help to fine tuning the Vision towards the future and flexibilized the adaptation level in front of wild cards events that could appear in the company's life. In base of the Scenario generated through an environmental scanning process, identify the parts of the environment that will influence such scenario. This process will take place only if the firm will like to invest time and efforts in this automated exercise to generate a more detailed prediction of the future that will affect the company performance. In this step there should be used the tools from AliahThink templates; AliahPredict.

JuliusPlanning

According to the preferable future analysis, we proceed to define actions that the organization should realized to potential and reach the maximum performance aligned with the predefined vision.

JuliusPlan uses the AliahThink model and a methodology for identifying and for prioritizes strategic actions. What is the desired future that takes advantage of the things you are doing now that is good? What actions address your most important

strengths and weaknesses? What is your strategic direction and what is most important to be done in the short term as opposed to the longer term? The Company can determine if the strategic actions are going to help make the future bright by making the previous step of the JuliusProspective Process.

9. - Final Integration

Finally, when all the processes have been completed, they should be integrated in a easy and complete way, that can be made trough the Goal Maker Software, that allows to put measures and dates of completion from goals to tasks related to a specific vision. This will be a great help to monitoring the plan development and also to change the plan if the environment has changed.

10.- Challenges for the Future, Goroic Vision

Once we have built up this new strategic shell, called JuliusIntegrator, we have a vision in designing an advanced an flexible type of balanced scorecard, named Goroic Vision, that will integrate all the work done in JuliusProcess and will allow to have an on-line company performance, trough a simple but powerful screen design, that will enable with the mouse click to navigate trough the company living system.

JULIUS S.A. team is currently working in the design of a methodology that will allow to implement the JuliusProcess, adding a global vision trough a graphic presentation with a universal language as are multiple gradients colors, implemented in a multifunctional software that will be able to help all types of organizations that normally deal with complex and chaotic environment. Goroic process takes what has been developed in the JuliusProcess and generates a set of a Mosaic or mandala graphic around the Organization Vision, and a subset of these graphs should be made for each mosaic. Also, trough the same monitoring screen, we will be able to simulate the company's future, changing parameters and external variables and to test the organizational virtual response to new environments. All of this will be reflected with figures and symbols easy to understand and interpreter.

The main strengths of Goroic Vision will be:

- Very easy to understand and interpreter
- Compatible with the standard strategic planning for organizations.
- Navigation inside of a company area with a simple mouse click.
- Allows to concentrate in areas that will contribute to the 80% of success
- Allows participation and commitment of every worker of the company
- Allows to use different automated processes in a integrated way
- Allows to manage the future.
- Minimize frustration inside the organization
- Allows interfunctional communicational and flexibility within the organization
- Allows organizational empowerment
- Allows to maintain a sustainable growth of the company, controlling those areas that go to fast or low compared to other areas or to the desired performance.
- About related areas, allows to weight with greater accountability, when the performance of one specifical area depends of the collaboration of another area that it is suppose to be well considered, but in reality is a bottleneck for the first area, that has been affected by a negligent third party. It means, if I do not collaborate with other members of the group, I will be bad evaluated, even if my personal performance is good.

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