the **strategy activation** playbook

WORKSHEET **WORKBOOK**

ARIC WOOD + XPLANE

contents

3 Vision Map

4 Measurement System

5 Who/Do

6 Discovery Card Analysis

7 Barriers to Change Analysis

8 Force Field Analysis

9 Empathy Map

10 Rose/Thorn/Bud

11 Eight Dimensions

12 Insights

13 Building Blocks Cheat Sheet

14 Activation Roadmap

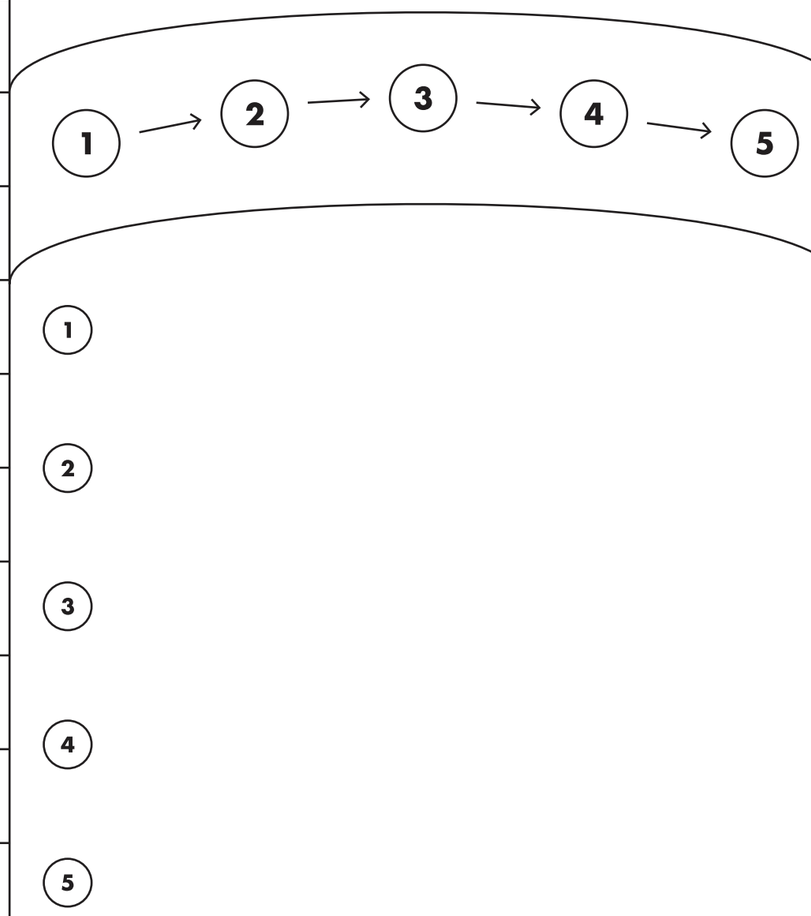
15 Activation Roadmap Example

16 Refinement Punchlist

17 Governance Planning

Vision Map

CURRENT STATE	BRIDGE	FUTURE STATE
What does our world look like today?	What steps do we need to take to get there?	What do we want our world to look like tomorrow?



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Measurement System

NAME OF INITIATIVE:

What outcomes would we see if we achieve our vision?

What qualitative measures will improve?

Resulting Dashboard: What are the top qualitative and quantitative measures we'll use to track this initiative?

What quantitative measures will improve?

Activation Plan Progress?

How will we know when everyone is aware?

How will we know when everyone is engaged?

How will we know when everyone is living it?

Action Plan: What steps do we need to take to install measurement and ensure we can collect and report this data?

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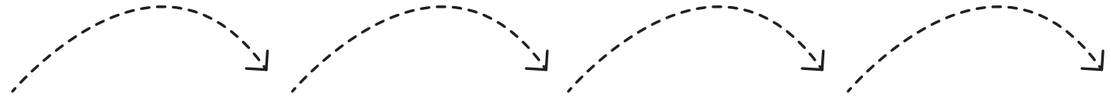
Who/Do



WHO IS YOUR TARGET AUDIENCE?	WHAT DO THEY NEED TO UNDERSTAND?	WHAT DO YOU WANT THEM TO **DO?**
TARGET 1		
TARGET 2		
TARGET 3		
TARGET 4		
TARGET 5		

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Discovery Card Analysis

PRIORITIZE SITUATIONS

BRAINSTORM SOLUTIONS

ACCOUNTABILITY & NEXT STEPS

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Barriers to Change Analysis

BARRIERS	CAUSES	SOLUTIONS
CARD 1		
CARD 2		
CARD 3		
CARD 4		
CARD 5		

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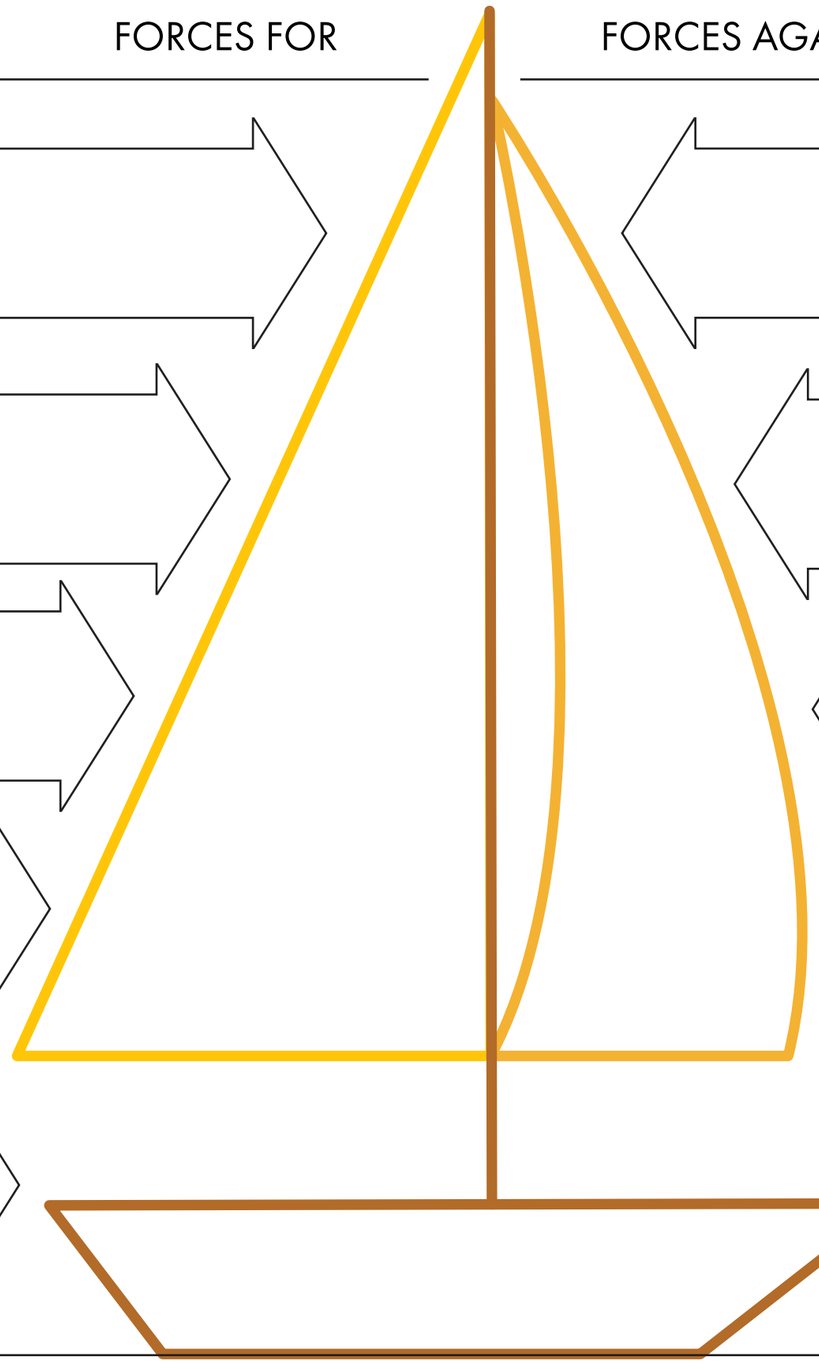
Force Field Analysis

TOPIC:

FORCES FOR

FORCES AGAINST



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Empathy Map

1. WHO are we empathizing with?

GOAL

2. What do we want them to do?

6. What do they HEAR?

7. What do they THINK & FEEL?

3. What do they SEE?

PAINS

GAINS

4. What do they SAY?

What other thoughts & feelings might motivate their behavior?

5. What do they DO?

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Rose/Thorn/Bud

PROPOSED CHANGE:

ROSE

What will be **positive** about this change for the organization?

THORN

What **challenges** will this change present to the organization?

BUD

What are your ideas of how we might support the **successful growth** of this change?

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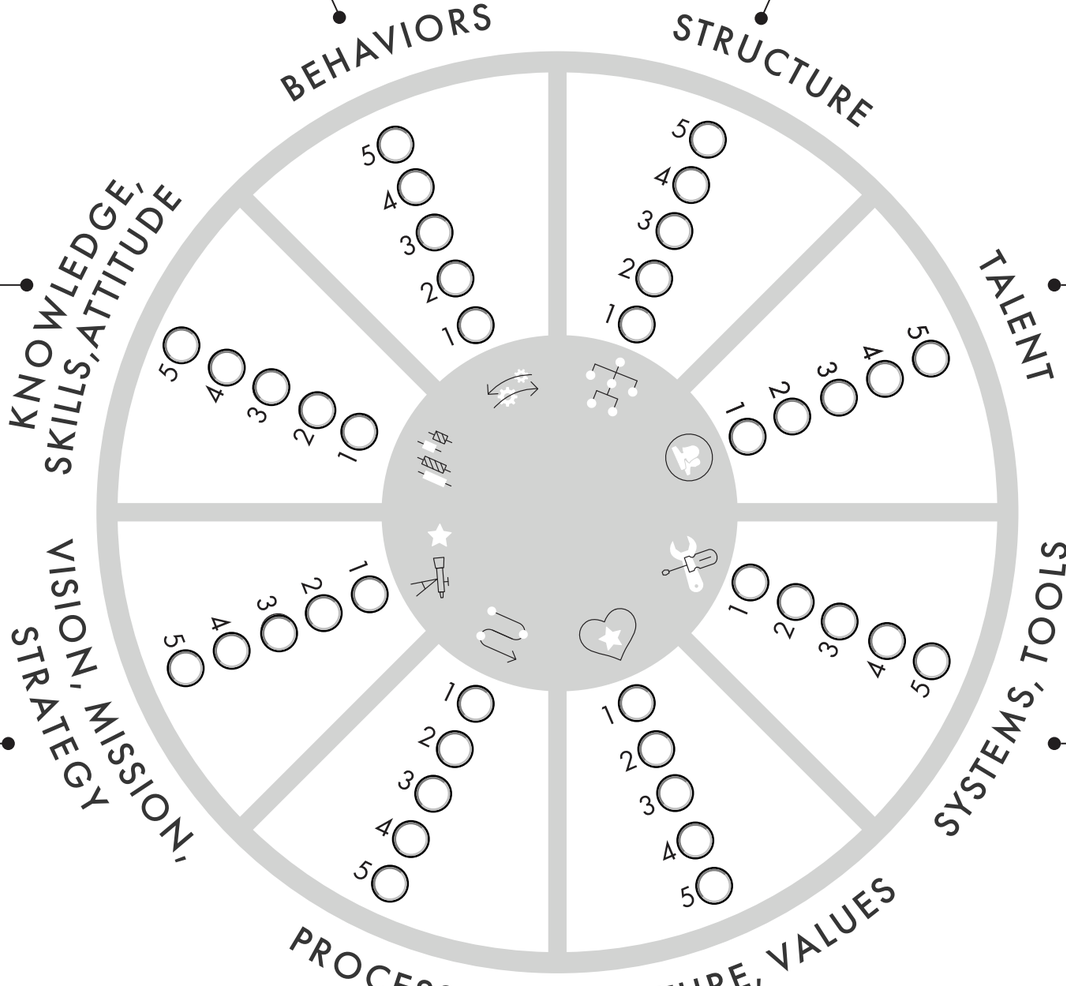
Eight Dimensions



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Insights

NAME OF INITIATIVE:

STAKEHOLDER INSIGHTS

ORGANIZATION INSIGHTS

CONTEXTUAL INSIGHTS

ACTIONS TO TAKE

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Building Blocks Cheat Sheet

Sharing the Story

Map/Visual Explanation

Poster/Mural

Email

Digital Magazine or ebook

Podcast

Installation/Pop-up Exhibit

Presentation

Brochure

Memo/White Paper

Animation/Video

Interacting & Exploring Individually

Risk Free Prototyping/ Experimentation Sandbox

E-learning

Interactive Experience/ Website

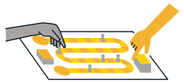
Intranet Feature/ Microsite/Blog

FAQ

Interacting & Exploring with Others

Workshop

Webinar/Webcast


Learning Game

Demonstration

Instructor-led Learning

Executive/Stakeholder Briefing

Offsite Team Building

1:1 Meeting

Team Meeting/ Briefing/Rally

Roadshow

Conference

Shaping the Solution

Listening Tour

Hackathon/ Design Sprint

Feedback Loop to Gather Input

Personalizing the Story

Worksheet

Journey Map

Role Play/Skit/Improv

Scenario Planning

Tools For Daily Work

Quick Reference Wallet Card/Keychain

Q&A On Demand/Answer Sensei/Help Desk

App/Mobile Experience

Forums/Asynchronous Q&A

Handbook/Guide/ Playbook

How-to Videos

Card Deck

Tracking Progress

Success Stories/Spotlight Videos/Case Studies

Dashboard/Status Tracker/ Data Visualization

Measurement System/ Gather Evidence

Feedback Loop on Individual Performance

Celebration

Staying Motivated

Contest/Competition

Recognition/Shout Outs/ Awards/Incentives

Quiz/Test

Big Symbolic Action by a Key Influencer

Flip Learners to Teachers

Town Hall/ Lunch & Learn

Best Practices

Equip Champions with Whiteboard Sketch

Advocacy Kit

Peer Coaching/ Mentorship

Keeping Top of Mind

Tips & Tricks/ Daily Reminders

Environmental Reminders

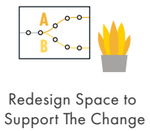
Build Unique Linguistic Visual Identity

Maintaining Victories

Leverage Existing Totems/ Rituals/Symbols

Update & Align Related Processes & Documents

Document & Archive For Long Term



Redesign Space to Support The Change

Onboard New Employees

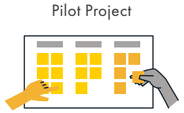
Continuous Improvement

Retrospective

Insights to Action Workshop

Pilot Project

Start/Stop/ Continue Exercise


Kanban Board

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Activation Roadmap

Stakeholders

Over the next few months, we will rollout targeted communications to key audiences in a three-phased approach.

HEAR IT:
Awareness

BELIEVE IT:
Training

LIVE IT:
Go Live & Support

GROUP 1

GROUP 2

GROUP 3

GROUP 4

GROUP 5

MEASUREMENTS

Survey Points

Does everyone know why we're doing this and what this is?

Is everyone trained and prepared to use the new system?

Are we delivering high-quality support to our staff?

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Activation Roadmap Example

STAKEHOLDERS

MILESTONES

Stakeholders

Over the next few months, we will rollout targeted communications to key audiences in a three-phased approach.

HEAR IT:
Awareness

BELIEVE IT:
Training

LIVE IT:
Go Live & Support

GROUP 1

- Map/Visual Explanation
- Animation/Video
- Offsite Team Building
- Executive/Stakeholder Briefing
- Scenario Planning

GROUP 2

- Map/Visual Explanation
- Animation/Video
- Offsite Team Building
- Presentation
- Scenario Planning

GROUP 3

- Map/Visual Explanation
- Animation/Video
- Intranet Feature/ Microsite/Blog
- Presentation
- Card Deck
- 1:1 Meeting
- How-to Videos
- Feedback Loop to Gather Input

GROUP 4

- Poster/Mural
- Journey Map
- Intranet Feature/ Microsite/Blog
- Presentation
- Worksheet
- Handbook/Guide/ Playbook
- How-to Videos
- Quick Reference Wallet Card/Keychain
- Q&A On Demand /Answer/Help Desk

GROUP 5

- Poster/Mural
- Journey Map
- Intranet Feature/ Microsite/Blog
- Presentation
- Worksheet
- Handbook/Guide/ Playbook
- How-to Videos
- Tips & Tricks/ Daily Reminders

MEASUREMENTS

Survey Points

Q1

Does everyone know why we're doing this and what this is?

Q2

Is everyone trained and prepared to use the new system?

Q3

Are we delivering high-quality support to our staff?

BUILDING BLOCKS

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Refinement Punchlist

- [ ] Do we have a communication vehicle to address all of the stakeholder questions?
- [ ] Do we have a learning or training vehicle, or a job-aid, to provide all stakeholders with the skills and support they need?
- [ ] Have we built in opportunities for stakeholders to participate in co-creation activities?
- [ ] Have we considered the culture and how our program addresses the needs and the challenges?
- [ ] Have we addressed the identified barriers to change for our specific initiatives?
- [ ] Have we considered the broader context and how it might speed or slow our progress?
- [ ] Have we ensured that the chosen building blocks are authentic and “fit” with our organization?
- [ ] Have we organized the activities with the timing and key milestones in mind?
- [ ] Have we built in feedback loops to gather insight, both qualitative and quantitative, along the way?
- [ ] Have we identified mechanisms to support continuous improvement over time?

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Governance Planning

NAME OF INITIATIVE:

PURPOSE
What is the purpose of this governance program?

PROCESS
What is the process by which these people will govern this initiative?

- When and how frequently will we meet?
- What is our agenda?
- What actions can we take?

PEOPLE
Who are the participants in this governance program?

- Who is the accountable leader?
- Who is the supporting team?

PERFORMANCE
How will success be measured?

- Short-Term
- Medium-Term
- Long-Term

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Aric Wood is the CEO of global design consultancy XPLANE, where he leads the firm's Strategy Activation practice. XPLANE has developed a unique approach to leveraging human-centered design, visual thinking, and co-creation to help engage, align, and activate people to bring their strategies to life.

With over 25 years of experience working with over 100 of the Fortune 500, as well as federal and local governments, non-profit organizations, and global NGOs, Aric has a unique perspective on what it takes to successfully lead change through people in organizations of all sizes.

He has shared his experience and knowledge as an author, a keynote speaker, a university instructor, and has served on numerous commercial and non-profit boards, including The Design Museum Foundation and the Pacific Northwest College of Arts (PNCA).

Aric previously served in leadership roles at Intuit and Epinions.com, and as a strategy consultant at Bain & Company. Aric earned a bachelor's degree in International Relations from The Johns Hopkins University and an MBA from Harvard Business School.

XPLANE helps leaders realize change by activating people. Whether launching a new vision activating strategy or embedding new ways of working, XPLANE helps accelerate understanding and adoption by engaging teams with communications, learning programs, and tools that will accelerate adoption and results.