



Leadership and Team Development

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Team Tools Series I – Mastering Planning and Decision Making

The Seven Management & Planning Tools

AFFINITY CONSULTING

The Seven Management and Planning Tools: The Affinity Diagram

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Tools for More Effective Planning and Decision Making in a Team Environment

Use these tools with your teams for building consensus and getting things done!

These tools are simple to use. This how-to manual will walk you through the steps for using these tools in a team setting. It contains some valuable tips and other information, which will make the introduction and ongoing use of these tools easy for you and your team.


I C O N K E Y	
	Valuable information
	Steps for using the tool
	Team exercise
	Example


The icon keys to the left are used as helpful visual symbols which appear throughout the manual. Take a moment to familiarize yourself with them before we proceed. This sample manual contains one free tool for you and your team to use. You may copy and distribute it to other team members in your organization, provided the entire document is distributed, with the copyright notice on the second page included.


What are the Seven Management & Planning Tools?


The seven management and planning tools are used in leading organizations throughout the world as a set of team based tools for making better decisions and implementing them with greater success. When used as individual tools, they provide an organized way of thinking and making decisions. When used in

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combination with each other, they provide a powerful answer to the way in which teams can respond effectively to issues that can at times seem confusing and chaotic.

The seven tools are:

- The Affinity Diagram
- The Tree Diagram
- The Inter-Relationship Digraph
- The Matrix Diagram
- Prioritization Matrices
- The Process Decision Program Chart (PDPC)
- The Activity Network Diagram

The Affinity Diagram

Using the affinity diagram requires a team effort. Because of this, it will require the full attention of all team members who are affected by the issue or problem. The following tips on when to use it are helpful:

You should only use the affinity diagram when:

- ① Your team has a large amount of information or ideas to sort through
- ① The answer or solution is not apparently obvious to all
- ① The solution requires strong consensus amongst the team members (and perhaps others) to work effectively

Why use it?

- To discover previously unseen connections between pieces of information or ideas
- To brainstorm root causes and solutions to problems, especially when little or no data is available

- To draw out common themes from large amounts of information

What benefits will I get from using it?


There are many benefits to be gained from using this tool. Among the foremost are the following:


- Causes breakthroughs to emerge
- Builds teamwork
- Causes connections to be discovered between various elements of information
- Builds critical thinking skills within the team
- Builds communication skills within the team
- Allows for full contribution of each team member


As you use the tool, you will no doubt discover other benefits that are unique to your team.


How do I use it?


Following these steps will ensure a trouble free use of this tool, the discovery of new insights to tough challenges and issues and new solutions to old problems:


 Step 1: Ensure that the team is comprised of the appropriate people





 *Try to anticipate who is or will be impacted by the issue or problem and potential solutions - include them as early as possible in the process*

 Step 2: Describe the issue or problem in a full sentence

 *Use the “Rule of 7 plus or minus 2” to limit the sentence size, i.e. the sentence should have no less than 5 and no more than 9 words in it, including a verb and a noun*

 Step 3: Brainstorm causes to the problem, or if it is an issue or challenge, responses that will address it

 *Use a standard brainstorming technique – remember to go for volume, suspend judgment, piggyback on each other’s ideas and set a strict time limit*

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☞ Step 4: Record each idea on a Post-It note

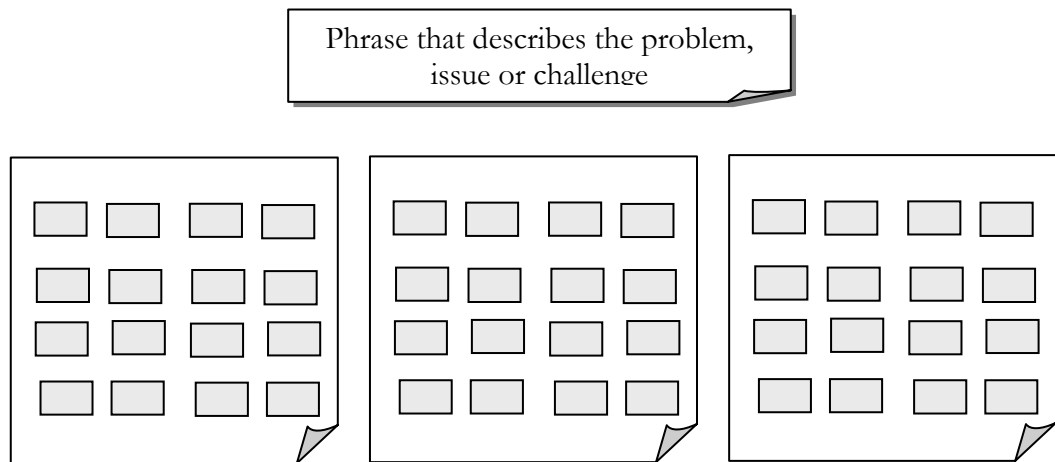
① *Make the notes legible and visible from 5 – 7 feet distance, using the “Rule of 7 plus or minus 2” to keep the statements manageable*

☞ Step 5: In groups of 3 – 4 people, sort the Post-It notes into natural groupings or themes – do this silently

① *Lay the notes out on large sheets of flip-chart or butcher paper, either on a flat surface or on a wall, leaving plenty of room for sorting – a good rule of thumb is to have three times the amount of space it requires to lay out the notes initially*

① *The need for maintaining silence is absolutely critical to the process at this stage, as it ensures that each member has an equal opportunity to allow their best thinking to emerge, without being influenced to conform to others’ thinking*





The sorted notes should look similar to the following diagram:





☞ Step 6: Create consensus around the groupings


① *As soon as people slow down or stop sorting, it is time to break the silence, by commencing a discussion around the shared meaning of each grouping – changing the groupings will help to create consensus. Once consensus is reached, the team is ready to move on to the next step*


ICON KEY	
①	Valuable information
☞	Steps for using the tool
👥	Team exercise
🔄	Example


ICON KEY	
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 Some Post-Its will not fit easily into any grouping – it is okay to leave these as stand-alone cards; create a small “Parking Lot” for cards such as these, but don’t allow any more than 4 or 5 cards into the lot


 Some cards will fit into more than one grouping, in which case the team should create duplicate(s) and place them in the relevant group(s)


 Although there is no hard and fast rule for the minimum/maximum number of cards within each grouping, generally 10 – 15 seems to work reasonably well, whereas the “Rule of 7 plus or minus 2” should be applied to the number of groupings

 Step 7: Create a summary Post-It for each grouping

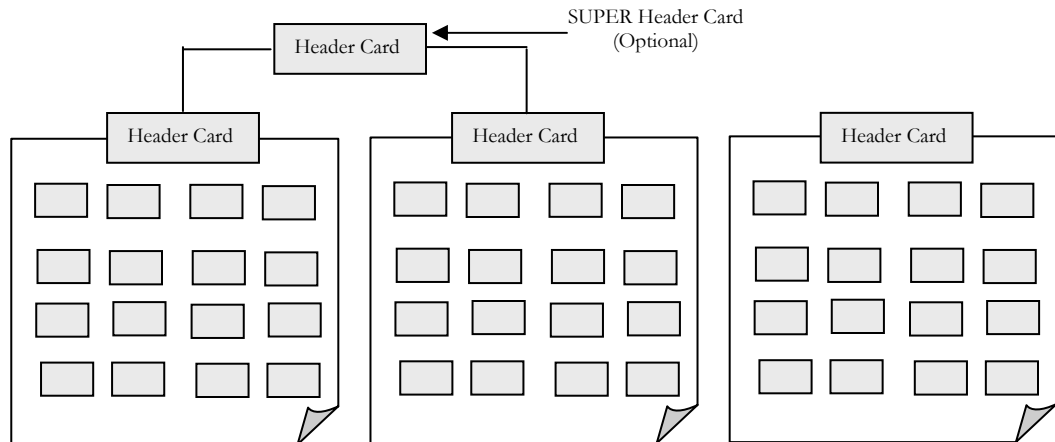
 To create summary cards (also referred to as “header cards”) ask the following question for each grouping: “What key word(s) or phrase adequately summarizes the central theme or idea that this grouping communicates to us?”

 Spend sufficient time at this – a hastily developed header card can destroy all of the previous work that has gone into the effort


 Sometimes a single card from within the grouping can be used as a header card – however, don’t jump to this as an expedient solution, as the time spent discussing the creation of a header card can lead to new breakthroughs in thinking


 Sometimes a “SUPER Header Card” can be used as a “parent” of the header cards developed (see illustration below), but this does not occur very frequently


The final diagram should look similar to this:




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That was a quick tour of the steps involved in developing an affinity diagram. What follows is an actual example of one in use. For the sake of brevity, we will not show all of the cards generated, but by reviewing the example you should be able to get a better picture of what an affinity diagram looks like.

The Organization

ABC Rehabilitation Services is a national organization whose mission is to “provide the *highest quality* rehabilitation services to the corporate sector, at a *competitive* price and with the *fastest* access in the business” ABC Rehab have been in business for ten years and have an overall annual growth rate of 22%. They own and operate 115 rehab clinics nationally, with an additional 27 franchised clinics that are growing at a faster rate, approx 33% annually

The Issue, Challenge or Problem

The issue facing ABC Rehab is that although their quality and price is seen as the best available, they have been losing market share to smaller, more nimble organizations operated by newcomers. Many of these newcomers would be regarded as ‘mom and pop’ operations, and the management team believe that loss of market share is because ABC is viewed by clients as being much slower in their admissions process. This is important because early intervention is a key to speedy, positive outcomes in this industry, and can make or break an operation. There is no consensus amongst the management team as to why ABC is perceived as slower, although there is agreement that the process must be streamlined.

The Team and the Problem Statement

The management team got together, and with the help of an experienced facilitator, embarked upon an investigation of the causes and potential solutions to this problem. The team felt that they had enough evidence (quantitative and qualitative) to justify spending the time using the affinity process as the first tool in developing a greater shared understanding of the problem. There was a sense of urgency surrounding it as the team got together at their first meeting. Following some lively and animated discussion, the team with the help of the facilitator came up with the following problem statement and posted it on the wall:

***Why is ABC too slow to respond
to admissions?***

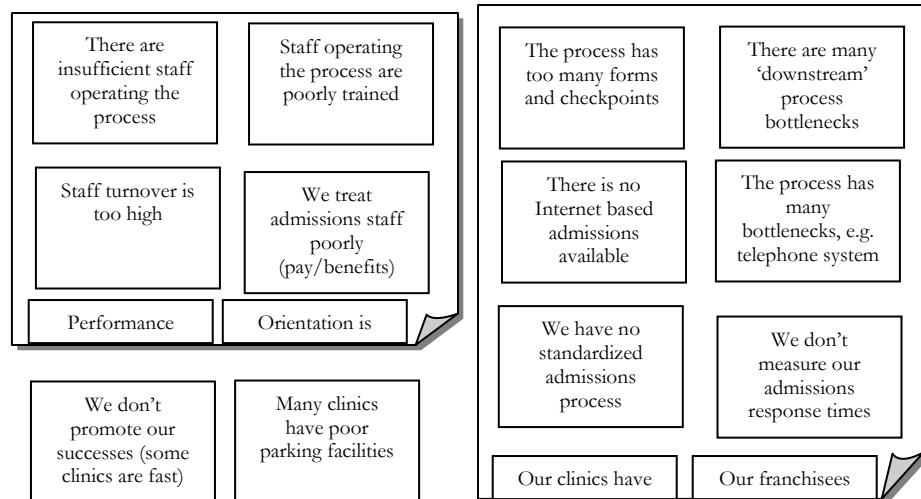
The facilitator then led a brainstorming session, where the normal rules of brainstorming applied. The team members were amazed to find that they generated almost 140 potential causes in less than an hour!

The next step was to take this mountain of information and start the grouping process. As the team comprised of eight members, they divided themselves up into two groups of four each. The first group moved through their sorting task in silence (although some felt uncomfortable at not being able to “think out loud”, they soon got used to the idea, knowing that they would have plenty of opportunity to discuss their thought later).

When the first group finished the second group got going, and were delighted to learn that they had the freedom to change the first groups sorting! This process repeated itself one more time, i.e. each group had two opportunities to do a sort.

The team was amazed at how much consensus was evidently beginning to emerge...without a single word being spoken! They sorted and grouped the cards into six groupings.

A sample of their sorted cards included the following:



As you can see, two cards remained unsorted, - it was agreed to investigate these further at a later date. After some discussion, the team agreed on header cards for the six groups, as follows:

- ① Human Resource Issues That Impact Speedy Customer Service
- ① Lack of Process Standardization and Measurement across our clinics
- ① Lack of Adequate Technology and Computer Systems at customer interface
- ① Inadequate Attention to Speedy Customer Service in Our Strategic Plan

- 🕒 Lack of Promotion/Marketing of our Sites that exceed Industry Standards in Responsiveness
- 🕒 Lack of Understanding at all levels in ABC re the Importance of Customer Response Times

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-

For the sample shown above, the first two bullet points were used as the header cards. The items were transcribed to a MS Word file. The team then moved on to the next tool, which is the Prioritization Matrix, which allowed them to reach consensus on which of the six groupings to work on first. The team was well on it's way to solving the problem, due to the increased consensus and teamwork that resulted from using these tools.

👥 Team Exercise

It's now your turn! Start by appointing a facilitator, someone experienced at working with teams. They do not necessarily need to have experience using this tool, but it would help of course if they did. The facilitator will be responsible for ensuring that the process is a success. He or she will do they following:

- 👥 Interview each member of the team and get their input on the types of issues, challenges or problems facing the team
- 👥 Work with the team and the team leader at selecting one issue to work on first, in order for the team to gain some experience at working with the tool.
- 👥 Organize and set up the session (sessions last 2 – 3 hours)
- 👥 Arrange for support services, if necessary
- 👥 Document the results
- 👥 Customize this tool to include the example that the team worked on

Good luck with your efforts!

About Affinity Consulting



Affinity Consulting is based in Edmonton, Alberta. We have over thirty years experience in working with leaders and their teams. We provide services in consulting, training, facilitation and tool development to leaders and teams in the health care and service sectors.

We can **customize** these tools and associated manuals to include examples from your own organization or industry sector, which can then be reproduced by you without restriction for use within your organization. This approach provides for a very cost effective means of integrating team based consensus building approaches within your organization.

Other tools include:

Team Tools Series II – Mastering Continuous Quality Improvement

Team Tools Series III – Mastering Creativity and Innovation

Call, fax or e-mail us if you have any questions or require any assistance.

Visit us on the web at www.affinitymc.com

Other publications by Affinity Consulting:

'Lead People...Manage Things' is a leadership development manual that shows you how to master the [5 Key Facets of High Performance Leadership](#) and become a GREAT leader. It's like having a coach by your side...

"I have to say, that in my course of doing research for a paper I am writing on leadership, this has to be one of the most interesting and useful sources I have found. Clear and concise -- I felt inspired!"

Sigrid Johanne Stover, Oslo, Norway

