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From strategic planning to the designing of strategies: A change in favor of strategic design

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Abstract

This paper proposes the creation of organizational strategies rooted in the culture of strategic design, considering the epistemological presuppositions of the paradigm of complexity. It is a process that accepts and aims to deal with uncertainty, randomness, unforeseeability and contradictions, through dialogical cooperation between the multiple actors tied to the strategy and affected by it. The process is iterative, non-linear, and delimited in time, over five moments of collective creation: inspiring, imagining, inventing, implementing and incubating. It is a process of collective construction, developed by multidisciplinary teams, in which the strategist-designer can play different roles: antenna, visionary, experimenter, connector and entrepreneur. The intention is to offer an alternative model to traditional strategic planning that still follows Cartesian thinking in its inception.

Keywords: strategic design, design of business strategies, design process.

Introduction

By understanding the world according to the epistemology of complexity, we detach ourselves from the linear reasoning that governed the idea of the progression of the Modernity project. We embrace paradoxes and we seek ways of living alongside them due to hearing a multitude of voices, originating from different disciplinary perspectives. We start to think in terms of encounters, interconnections, flows and occurrences. Complex thinking replaces the standard of Cartesian thinking, of linear reasoning and even of systemic thinking, as part of a "post-modern" project, thereby accepting change and uncertainty as essential elements of complex and adaptive systems (Mariotti, 2013). These systems are distinguished by multiple connections between their component parts, by flexibility, by adaptability, that is, the capacity to deal with what is new and unexpected, with differences and opposites living alongside each other.

Complex thinking operates "in terms of interconnecting things, ideas, people and events" (Mariotti, 2013, p. 9). As a result, one opens up to non-linear thinking in a manner complementary with linear thinking. One accepts mistakes as part of the process of living alongside uncertainty. One breaks away from the notion of externality: there is no external environment, the system is open to and interdependent on the flows of the context of which it is part. The focus becomes the understanding of the processes and relations between the elements of the system and the sensory effects produced by them.

With this rupture, we give up on the metaphor of the machine and the mechanist logic that has dominated the production of knowledge in modern times. Instead, we move on to using metaphors linked to the natural environment and living organisms. Since this change brings with it an important evolution for the field of design: if it no longer makes sense to think in terms of machines, it also does not make sense to think about problems to be resolved as part of the system. Problems, understood as disorders or dysfunctions that need to be fixed in order for the system to resume functioning normally, cease to make sense under the paradigm of complexity and in the same way design as a problem solver. As part of complexity, one understands that the systems are constantly changing and the concept of autopoiesis, that is, the capability of the system to change and adapt in light of changes by the environment without the system losing its identity, becomes fundamental. To this extent, strategic design as an area of knowledge must adapt: from problem solver to problematizer. In this way, the qualities of the design shift to being used to question the status quo, to discover emergences, indicators of change to the environment, and to develop strategies in support of reorganizing the system, in such a way that it adapts and continues to exist. Designers contribute to the rearrangement of the significance of systems in such a way that they maintain their identity and persist, that is, "design as sense maker". As Manzini (2015, p. 35) asserts: "[design] collaborates actively and proactively in social construction of meaning. And therefore, also, of quality, values and beauty". And Verganti (2008, p. 440) highlights "designers give meaning to products by using a specific design language – that is, the set of signs, symbols and icons that delivers the message".

This new understanding brings with it implications for the ambit of organizations and for the ways of defining strategies for their survival, given the changes that occur in the context. Modern thinking introduced strategic planning into organizations, by undertaking analyses to inform thinking and to attempt to reduce external complexity in manageable programmes. Planning presupposes the reduction of uncertainties and control. As Morin (2005) points out, this is not a suitable type of action for turbulent and uncertain environments. The author teaches us that only strategy helps to move forward when faced with uncertainty and randomness. Strategy is action. And action presupposes complexity, that is, dealing with chance, the unforeseen, initiative, decision-making, awareness of drift and transformations. Developing strategies involves seeking information to deal with chance: fighting against it at the same time as managing to take advantage of opportunities from it. Strategy considers scenarios for action, which can be updated according to the information obtained during the action (Morin, 2005).

In uncertain and turbulent contexts, one needs to find new forms of developing organizational strategies. Designing is a creative act of transporting oneself in time and space. It involves speculation of different scenarios for the action and in this way on what is adequate for this type of context. As such, we suggest the culture of strategic design as way forward. Culture concerns the critical thinking and constructive attitude that proposes new values and visions (Manzini, 2015). Strategic design, as a design process that contaminated by paradigm of complexity to develop, adapt and evolve organizational strategies, which will allow organization to adapt to changes in the context, thereby sustaining themselves in the long term (Mauri, 1996; Zurlo, 2010).

Design culture is a cooperative activity that engages different actors involved in bring an idea to fruition. Julier (2006, p. 70) asserts "The project process is understood to be produced within and by a network of everyday knowledge and practices that surround the designer". The notion of design culture emphasizes a "way of doing things" in a context-dependent manner (Deserti and Rizzo, 2014). A project is a place for ambits of multiple collective intelligence experiences to meet and integrate. A project is "opening up to what is possible, upon becoming part of the world, it is an event open to a new world order of connections" (Mauri, 1996, p. 29). In this regard, the culture of strategic design brings to the organization a problematizing vision of the world, which interprets contexts and recognizes the emergences that give rise to imbalances in society, in the culture, in the market, in the economy, in politics, and that as a consequence affect them. On this basis, it is capable of identifying possible discontinuities, opportunities for change in the system, in alignment with Morin's proposition (2005, p. 82), "frequently we need to give up on the solutions that remedied old crises and develop solutions".

Designers of strategy must possess a method that allows them to design considering the plurality of actors and points of view; the paradoxes; the unforeseeability; the uncertainties; and the change acceleration during respective development. Strategies that are in turn systems of actions, artifacts and relations that an organization presents to the environmental, cultural, social, political, economic, marketing and consumption-related context. Strategies affect the context and they are affected by it. Recognition of change and the discovery of opportunities are the basis of forming strategy (Mauri, 1996).

Designing the strategy implies non-linear thinking, an action that "fosters discussion on a consolidated panorama with radically different choices" (Mauri, 1996, p. 33); a way of thinking that seeks new directions and explores unknown dimensions, which identifies problems and issues, which sees opportunities in the present. As such, a strategy project is a creative act of exploration and discovery that leads us to connect and arrange elements in an original way. It is a process "that is open to the event and makes it possible to perceive new movements and sense its meaning, observe a gesture and imagine its consequences, problematizing the obvious" (Mauri, 1996, p. 31).

That said, strategic design is a transdisciplinary projecting action, capable of connecting different points of view and intertwining interdependent competences and functions in the strategy's project. This proposes a distancing from disciplinary knowledge in order to seek new meanings in the existing disorder, thereby metabolizing different sets of knowledge to create new meanings that make up a new order. The capacity of design to promote dialogue and collective construction is at the core of this process. In this way, strategic design can be understood as a process of social learning that creates apparatus capable of fostering changes in the culture of organizations and society. It is a process that generates knowledge and that internalizes the strategies of adaptation and even evolution (Franzato *et al.,* 2015).

For this reason, we propose that strategic design is a process for creating strategies that generate value for the different actors of a creative ecosystem. Design can contribute towards the creation of socio-technical apparatus, which, based on the constant creative reconstitution of existing technologies, result in the production of new meanings. Ecosystems are defined here as social organisms in constant relation, with modes of organization with complex nature and dynamics, capable of setting up to survive over time (Franzato *et al.,* 2015). Socio-technical apparatus can be practices and mechanisms (artifacts, processes or systems) aimed at dealing with the urgent need to obtain a meaningful effect for social organisms (Agamben, 2009).

The perspective of the creative ecosystem draws us close to the innovation model driven by design proposed by Verganti (2009), in which, the design discourse that emerges from the interaction of the actors that interpret the socio-cultural context is central. This discourse is a collective research process that is unstructured, scattered and arranged in a network and relates to possible meanings for things. Companies that adopts it do not use existing and defined trends, but rather resort to an organic and collaborative process for analysing the information gathered by a network of interpreters[1] – various agents who have

[1] Designers, artists, journalist critics, users, suppliers, firms, researchers, professors are examples of interpreters.

common interests concerning the life context – to comprehend the socio-cultural context of people's life (and not the context for using objects). Based on this knowledge, they propose new visions and meanings for the evolution of these contexts through new design languages. As a result, they generate strategies with innovation meaning. Our proposal is for strategic design to trigger the creative ecosystem in the design discourse for the preparation of organizational strategies with a view to innovation and sustainability. Upon triggering the ecosystem, one opens up the strategy's designing process to beyond the organization's spaces, thereby fostering exchanges and learning and making the spaces into tangible design languages synthesizing collective knowledge.

In the sections below, we have presented the planning process for strategies, in order to remain open and flexible, looking to the future, and the roles that design can hold throughout the process.

The strategic design process

The design process is a creative process capable of encouraging the development of relations between the different actors of the ecosystem of innovation, thereby transforming collective intelligence into institutional intelligence. The objective is to support the collective construction of necessary knowledge, through strategic dialogues, with actors and groups holding different roles in the development of this institutional intelligence. Here, strategic dialogues are understood as ways of thinking and action explained through the construction of possible future scenarios, in which it becomes possible to evaluate the different paths for the construction of the solutions (Wood, 1999). By way of this collective knowledge construction process it is possible to generate new ideas to foster the targeted systemic changes. It is a process based on transdisciplinarity and, for this reason, one needs to nurture interpersonal relations, prizing to the maximum the diversity of human qualities (Levy, 2014). It is a non-linear process, open to interactions with the environment of which it is part, considering the circular nature of the actions and retroactions.

The path taken by the project can take different forms. It does not follow a sequence of pre-determined stages. It is designed by the group of actors that is part of the work team, based on the characteristics of the recognition of the need to reorganize the system in light of emergences. The designer of the strategies is responsible for setting up the teams with the necessary profiles, thereby ensuring disciplinary diversity, and for designing the tools capable of stimulating the strategic dialogue of this group.

A few principles must set the bounds for determining the project paths. They are linked to the cognitive operators of complex thinking: circularity, self-production, dialogics, hologramatic principle, subject-object interaction and ecology of the action (Morin, 2005; Mariotti, 2010). It is a process that accepts and aims to deal with uncertainty, randomness, unforeseeability and contradictions. For this reason, it is open to constant exchanges of information with the environment (in this case, the network of interpreters), through dialogical cooperation. This seeks learning through the comprehension of contradictions and differences. For this, it focuses on the point of view of others and interprets gestures, silence and statements, giving a meaning to collective subjects (Sennet, 2013, p. 26). It highlights the contradictions, which are welcome, that cannot be resolved and puts forward strategies for living alongside them. It is from this "creative tension brought about by unresolvable contradictions that solutions arise" (Mariotti, 2010, p. 152). One must consider that reality is a process of social construction that self-generates. In this way, the future is seen as a construction based on the propositions of the present, which is subject to both determinism and chance. An example of this is the vision that the market is not an a priori detail, but rather results from the relations between the actors that comprise it, from the unpredictability, and that can be modified by the dialogic relations established between an organization and its public.

At the core of the process is the collective construction of knowledge, which results from activities that foster the analysis, synthesis, creation and relationship between the parties and the whole. These constructions are affected by the environment and at the same time affect it. Due to this, ideas must be launched into the environment in order to foster synergies, interactions and to be adapted and developed. As a result, the paths are centred on the life contexts of the collective subjects (Meroni and Sangiorgi, 2011; Meroni, 2012) and established based on participatory forms of governance. Mainly they are undertaken in a tolerant environment, which encourages the acceptance of what is different from dominant thinking and recognition of the existence of what is new (Manzini, 2015).

Figure 1 presents the different moments of the path and the necessary activities for putting the strategy into practice and sharing the knowledge produced. The moments are called: Inspiring, Imagining, Inventing, Implementing and Incubating. The activities are: obtaining, dialoguing, summarizing, preparing, expressing, deciding, developing, analysing, organizing, piloting, evaluating, refining, communicating, engaging and taking action. They are all directed towards the construction of collective knowledge. The time spent on each one of the moments

Figure 1. Design process.

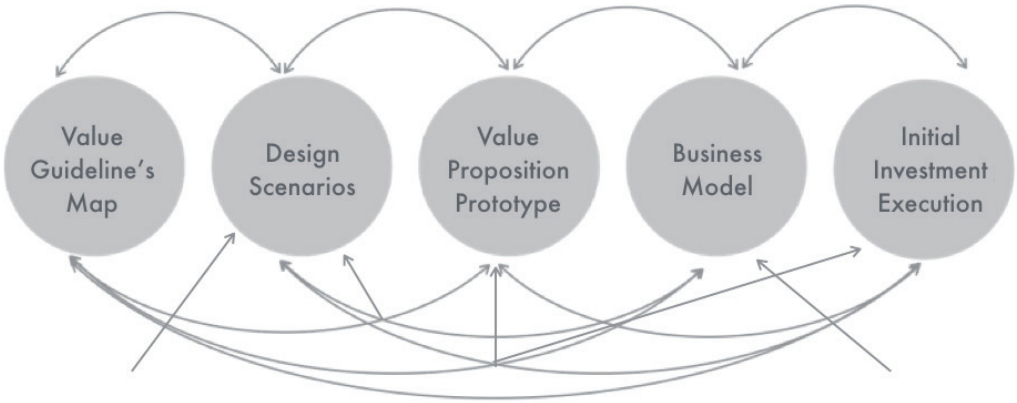

Figure 2. Possible results from the collective construction of knowledge.

of the path must be established based on collective decisions, in accordance with the agents' perceptions with respect to the environment's conditions. And renegotiated, if the initially-perceived conditions change.

The objective of the 'Inspiring' moment is to produce knowledge on the challenge that the team of designers is facing. Here we instigate dialogue between the past and the present, seeking to understand the different elements that give rise to changes in the organizational environment. It is necessary to bring into action the network of interpreters linked to the challenge in question, in order for it to be possible, through a coherent design discussion, to seduce people to implement the changes sought. For this reason, activities promoting different forms of listening from these collective groups are designed. Listening according to the meaning proposed by Levy (2014, p. 71): "causing to emerge, make visible or audible, the myriad of ideas, arguments, facts, evaluations, inventions and relations that comprise the real social." As part of these activities, the designer must devise tools to collect the necessary information, encourage dialogue and summarize the knowledge produced in forms capable of being shared with all those involved. These formats must guide the process of preparing the strategies and serve as determining factors, depicting the connections and opportunities to be considered throughout the process, such as for example: maps, manifests or guidelines for the value proposal.

The objective of the 'Imagining' moment is to open up thinking to the multiple realities that may exist and affect the activities and identity of the organization. Here we instigate a movement from the present to the future. The designer of the strategy is responsible for devising tools to be used throughout the activities to encourage the teams to prepare representations on future contexts, express visions of projects and decide collectively, through design scenarios, about the possible paths for the development of the strategies.

The 'Inventing' moment has the objective of formalizing possible actions. Here we move once again to the present. Here we identify in the present the resources that we have to build the future sought. The activities projected by the designer must develop, analyse and organize the business concept, a model of action in light of the reality affecting it. An important designing strategy can be that of using prototypes of the value proposal to encourage strategic dialogue and the sharing of visions between the multiple actors involved.

The objective of the 'Implementing' moment is to test the adequacy of the proposals. On this occasion, we move from the present to the future. We put the strategy's design into action, in order to affect and to be affected by the environment. The activities projected by the designer must allow the team to test, evaluate and refine the proposed business strategy. At this moment, the largest number of exchanges with the environment are undertaken, seeking feedback for the proposed actions. Based on this initial information for maintenance or adaptation of the proposed action, one seeks the support to strengthen it.

The 'Incubating' moment has the objective of making feasible the proposal's consolidation, with activities linked to: communicating the proposal to possible supporters, engaging people in the change process and searching for necessary investments to implement the proposal in such a way that the organization sustains itself over time, thereby constantly monitoring the need to adapt the strategy according to changes in environment. Once the need for adaptation is identified, another cycle starts.

The proposed process features the fundamental concepts (what needs to be done – moments), the techniques (how to do – activities) and an indication of possible results for the action (tangible prototypes of the strategy, see Figure 2). The teams can produce or select tools to help them throughout each moment of the path. Each one of the possible results of the action affects the others with respect to causal circularity or extrapolating. Further, the proposal does not separate conception from implementation. It is a continual flow of relations between the organization and the environment.

The roles

Considering the iterative, non-linear process, delimited by time, over the five moments of collective creation

presented previously – inspiring, imagining, inventing, implementing and incubating -, we identified different roles that are useful for the process of developing organizational strategies. Based on the work by Kelley (2007), Yee *et al.* (2009), Manzini (2011) and Cipolla and Moura (2012) five roles that a strategist-designer can fulfil along the different moments have been identified: antenna, visionary, experimenter, connector and entrepreneur.

The 'Antenna' role is linked to receiving signs of changes in the socio-cultural environment. For this reason, the designer interacts with the interpreters, encouraging the design discourse, and undertakes research on the socio-cultural environment. In this process, he or she obtains *insights* concerning behaviour, motivation, problems and opportunities in daily life and produces summaries to expand the repertoire of the team developing the organizational strategies, mainly at the 'Inspiring' moment.

The 'Visionary' role is linked to capacity to comprehend the challenges and search for innovative responses. He or she is the one who catalyses the innovation processes, removing people from their zone of comfort. The visionary shares his or her design repertoire with the team of designers, envisages possible futures and imagines scenarios capable of encouraging constructive discussion in the work group. This role creates visions for the future, based on the interpretation of the design discourse surrounding people's real experience, to inform and influence the process of formulating and visualizing the strategy. And he or she uses this communication to bring together disagreeing *stakeholders*.

The experimenter's role is linked to the belief that everything can be tested. He or she is the one involved in the process of discovering alternatives, testing innovative ideas and establishing relations with users to design with them. The experimenter develops and prototypes the imagined solutions, in order to make them technically feasible.

The connector's role is to determine the physical, human and strategic resources necessary for innovation, understanding the interactions, problems and opportunities in the establishment of the project network. The role seeks to integrate different ways of thinking, philosophies and approaches originating from different groups of *stakeholders*. For this reason, he or she encourages synergy, collaboration and participation by people, putting people's tacit knowledge in motion. He or she is the leader of the process to transfer knowledge, processes and design methods to the organization.

On the other hand, the role of mentor is linked to the monitoring of the strategy's design, seeking to support entrepreneurs in their implementation. He or she acts as lobbyist, seeking support, in and outside of the organization, to implement the new strategy.

It is important to stress that all these roles are necessary in the different moments of the design process. They must be considered upon setting up the multidisciplinary teams involved in developing the organizational strategies. A person can hold different roles throughout this process. In the same way as in each one of the moments, it may be necessary for different roles to be held. The roles can be held by people with different training, but who have the necessary skills for them.

Final considerations

In this paper, we present a proposal for organizations, operating in turbulent and uncertain environments, to plan their strategies in order to sustain themselves in the long term. The epistemological bases of complexity support the methodological level of strategic design and the techniques for putting it into action. It is a process of conceiving the strategies that changes the focus from decision making to sense making. As a result, the strategy design team must determine the strategy's meaning, that is, the purpose linking the actors in a common direction, as part of a dialogic cooperation process. As such, based on the purpose, the process of constructing the meaning is split into different operation scenarios, value proposals, business models and implementation plans that are linked to it. Here the hologrammatic operator of complexity is present: there can be no separation between the parts and the whole. The parties can be recognized as different, but completely interwoven in the strategy as a whole. Each one of these results is a prototype launched into the environment to obtain answers therefrom and give rise to learning, thereby updating the strategy.

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