

Environmental Scanning to Anticipate and Lead Change

Environmental scanning helps people and organizations examine trends and issues, anticipate what could happen, understand the implications and decide how to act.

Associations and nonprofits scan their environment to anticipate and lead change in their world. They scan to support strategic planning, strategy development and project and program planning; identify public advocacy issues and priorities; educate members on critical trends and issues; and enhance the association's strategic thinking. Scans give leaders a context for interpreting their environment and making better decisions. And if a scan exposes a chasm between where an organization is today and where it aspires to be, it can inspire a new vision and inform that transformation.

Signature i hopes for a day when all association leaders have the commitment and competency to help their members anticipate and prepare for the future. This would be a great outcome and wonderful way to end this part of our business. To hasten that day, we are eager to teach our secrets in the art of scanning. A few years ago when a client asked how do you come into a new area and produce a meaningful futures report, we couldn't explain well what we do. Like so many people who practice something that is more art than mechanics, we had to pay closer attention to how we work before we could share our trade secrets acquired through more than ten years researching the future for different organizations.

We don't just intuitively know something might be important, we know how to look. And you can too. If you are an association leader who is curious and a good strategic thinker, you can become an effective scanner. You just need a systematic approach to make sense of the constant flow of news, information, reports, videos and audio flooding into your life daily.

Signature i Secrets in the Art of Environmental Scanning

We read prolifically and somewhat randomly as a matter of habit. We do use social media and the eyes of the crowd as spotters. We follow other futurists and news and commentary media with an interest in the future. This requires a small bit of time each day and the discipline to look away from distracting topics. We haven't found the signal to noise ratio particularly productive with automated content aggregators using search algorithms. Perhaps this solution works better in specific industries or fields. For an understanding of important shifts, we rely most on what our colleagues in the Association of Professional Futurists share; perhaps your professional association's publications and listservs can become a similar resource for you.

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When we need to get to the “good stuff” fast for a specific association, we turn to these good sources to quickly build a credible understanding of the future:

1. **The next big idea and shared vision.** In every field there are turning points in how people view what needs to be done. These visions for the future can be found in reports from high level study panels, think tanks and summits of influential leaders and organizations. Some foundations use their resources to thoughtfully study priorities for change. These reports give us a quick grasp of the next big ideas in a field and the vision its leaders could share.
2. **Environmental scans by others.** Searching for published scans by related organizations is one of our favorite tactics. If the trend or issue is especially important, we will reach back into the cited sources. The only downside to reusing existing scans is they can feel a bit like an echo chamber of the official future. Of course, understanding how people define the official future can be helpful. When enough people believe in a future, occasionally they are right. And when they might be wrong for other reasons they haven’t considered, you can certainly get their attention.
3. **Thought leaders who challenge assumptions.** We search for people who have great strategic thinking ability or hold a very different world view. Every organization has access to visionaries and provocative thinkers who are attuned to the future. Contrarian thinkers help us see the potential for very disruptive changes. Because these thought leaders aren’t always published in the areas we want to discuss, we typically interview them.

Useful Terms for Scanners

Event—something big happens that could be a harbinger or turning point

Development—a new capability or attribute that emerges and changes the way things are

Trend—pattern of events or developments that has direction and momentum

Issue—a matter of public or organizational concern

Change Driver—any of the above coming together to create a major force for change

Futurists rely on scanning frameworks to systematically identify relevant trends and issues. Using a scanning framework will help you get a wide angle view of the changes around you. One common scanning framework is STEEPV (social, technology, economic, environment, policy and values). You may want to customize your own scanning framework to keep a closer eye on trends and issues that keep you and your members awake at night.

We populate our scanning framework with the events, developments, trends and issues that are affecting an organization or field. Then we analyze this collection to identify the change drivers or major forces of change.

When Signature i analyzes trends and issues to identify key drivers of change, we search for these five insights:

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1. **Patterns**—which trends and issues are weak signals or early indicators of major changes ahead?
2. **Game changers**—where are events and developments going wrong and where are innovations and new developments going right?
3. **Strategic issues**—where do these changes align with an organization’s perspective & priorities? Does the organization’s stated vision require it to act?
4. **Rates of change**—how quickly are these changes unfolding--days (breakthroughs), years (adoption cycles) or decades (paradigm shifts)?
5. **What’s not changing** and why--because not everything will or should change.

If a change driver doesn’t already have a good working name, we give it a meaningful name. A good descriptive name for a change driver can become a meme that helps express the full complexity and strategic direction of the change.

Turning Scans into Strategic Conversations

The very best environmental scan is worthless unless you use it to drive strategic conversation about the future throughout your organization. Scans are essentially learning and that learning, to be effective, has to be driven throughout the association. Who needs to know what you are learning? Give them access in easy-to-use formats that serve their purposes. You can build these conversation starting devices right into your scan report. Pose a set of strategic questions to help your members explore the implications. Illustrate the big shifts that are occurring (what we have today, what we will have) and ask if people are ready to respond to these shifts.

You can ask people to prioritize the trends and issues or change drivers and discuss why they are priorities. Or you could use your next board or senior management team to ask your leaders what they see as your association’s strategic issues: these changes affect your mission, you have the ability to intervene, and your vision requires you to act. Then get these strategic issues on your agenda for serious discussion and action.

Don’t limit these strategic conversations to your board and senior management team. Consider organizing a task force to scout the future; regularly use surveys, focus groups, town halls and online forums to engage members; and periodically organize think tanks and summits with key stakeholders and thought leaders.

In every conversation, be sure to ask people what else they see changing in the future. This reinforces that no scan is ever complete and they can be critical contributors in your ongoing scanning process.

That’s the basic secrets in the art of effective environmental scanning. There are many methods you can use for deeper analysis of the future, such as forecasting, three horizon scanning, integral futures, and scenario planning. Futurists can help you learn and use these methods. Becoming an effective environmental scanner is the first and critical investment in acting like the future matters.

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