

# Change-mapping

Connecting business tools to manage change

*Change-mapping* is a structured method to guide change affecting organisations. Inside this book you will find how to use *Change-mapping* to explore or resolve issues affected by change. The book introduces *Change-mapping* and takes you step by step through a basic *mission* to map change.

In addition there are a complete set of tool-sheets ready to be used in your own *Change-mapping* missions and a brief guide to using *Change-mapping* to explore or resolve larger scale and complex issues.

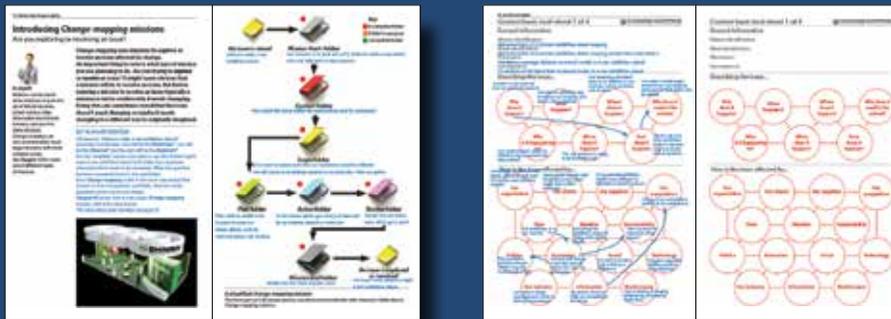
**Part of the *Change-mapping* series.**

*"Change-mapping" deserves to be part of the start-up kit of every cross-functional team that is about to tackle a complex business challenge - be it a business model adjustment, organisational change or operational problem."*

**Daniel Poso, PhD - Global Head, Digital Transformation Strategy, Product Development, Roche AG**

*"Using real-world use cases, practical guides and templates, this is a resource you can use to implement architecture systems and processes immediately and is perfect for those looking to understand enterprise architecture or progress to becoming a practitioner."*

**Heidi Beets, Enterprise Architect, Flight Centre Travel Group**



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Change-mapping

Tom Graves with Joseph Chittenden



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Connecting business tools to manage change



**Tom Graves** with Joseph Chittenden

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## Preface

### The inspiration behind the book

A few years back, a friend turned up at my house, looking frazzled and frustrated. He'd been trying to rethink his business-model, he said, waving various business tool-sheets. ***"How do I use these?"***, he asked. ***"I've filled in all the tool-sheets, but they don't tell me anything useful! It's like looking in a mirror, it doesn't tell me anything I don't already know. What can I do, to make it make sense? How do I link all these tools together?"***

We set to work. It didn't take long: in not much more than an hour, he had the basis for his new business-model, with new services, new products and new ways of working, all built upon what he already had. We'd used much the same tools as he'd brought with him; but what made the difference was how we'd used them - a structured way to map out the changes that he'd need, and how they would work in practice. A week later, he called again, saying that the insights had kept on coming for him throughout the following days: a new logo, a new website, a new set of services that he could offer his clients. Everything worked together now, he said, excitedly; everything made sense. And it's still going well for him now.

Fact is there's no shortage of tools and techniques, for almost any purpose, in business and beyond. But what's often been lacking is a good way to use them, to get them to work well, together, fast, across every context, every scope, every scale. A way that has the power and versatility to tackle any question or concern, to any depth, a way that lines up with how experts actually work, a way that works with almost any tool, yet is still simple enough for anyone to use.

That's the challenge we set out to resolve with *Change-mapping*. And that's what you have in your hands right now. We hope you find it useful.

Tom Graves  
Colchester, England  
February 2020

# A big thank you!

To our co-creators and valued patrons

This book would not have existed without a large amount of people who over the years have contributed great amounts of time and money to bring *Change-mapping* to a wider audience.

The author would like to thank:

Michael Smith (Mexico)

Helena Read (Australia)

## Patrons

The author would also like to thank all the valued Patrons at [www.patreon.com/tetradian](http://www.patreon.com/tetradian) who helped fund the production of this book.

As well they have given excellent feedback and helped with testing the materials.

## About the author

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Tom is known as a highly innovative thought leader on the futures of business. With a keen eye for systems and structure, he has nearly 40 years experience in knowledge management, skills research and software development. He is a prolific author, and experienced presenter on radio and television, at conferences and in workshops and seminars.

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## About the designer

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Joseph has produced concepts and visuals for companies such as: *Tesco, Lotus sports cars, T-Mobile, Honda, Makita, HM The Cabinet Office, Superdrug/3Phones*, and others on behalf of design agencies in England and Dubai.

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### How you can get involved!

To find out more about Change-mapping visit: [www.changemappingbook.com](http://www.changemappingbook.com)

[www.patreon.com/tetradian](http://www.patreon.com/tetradian)

If you would like to be involved with the development of new tools, testing and more then head over to Patreon to get involved.

# How to use this book

Getting the most out of the book

### Legal disclaimer

This book is presented solely for educational purposes. The authors and publisher are not offering it as legal, accounting, or other professional services advice. While best efforts have been used in preparing this book, the authors and publisher make no representations or warranties of any kind and assume no liabilities of any kind with respect to the accuracy or completeness of the contents and specifically disclaim any implied warranties of merchantability or fitness of use for a particular purpose. Neither the authors nor the publisher shall be held liable or responsible to any person or entity with respect to any loss or incidental or consequential damages caused, or alleged to have been caused, directly or indirectly, by the information contained herein.

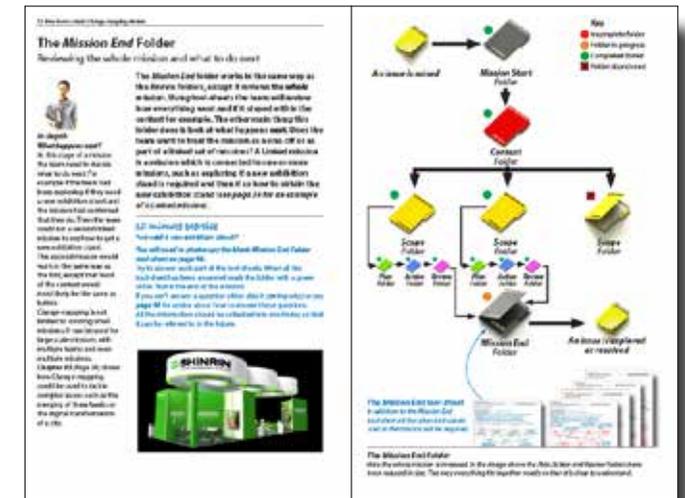
*Change-mapping* uses a simple framework and tool-sheets to help your organisation to explore or resolve an issue affected by change.

If your organisation has an issue which needs to be explored or resolved, then *Change-mapping* can be used to map out what is known and what is not.

This book shows how a small team can explore or resolve an issue from the wider context down to the fine detail. You will see how a basic *Change-mapping* mission works, step by step and with worked examples. In addition there is :

A trouble shooting section. A section showing the tools in action. A complete set of basic tool-sheets for use within *Change-mapping*.

As well as a brief introduction to some of the more advanced methods available.



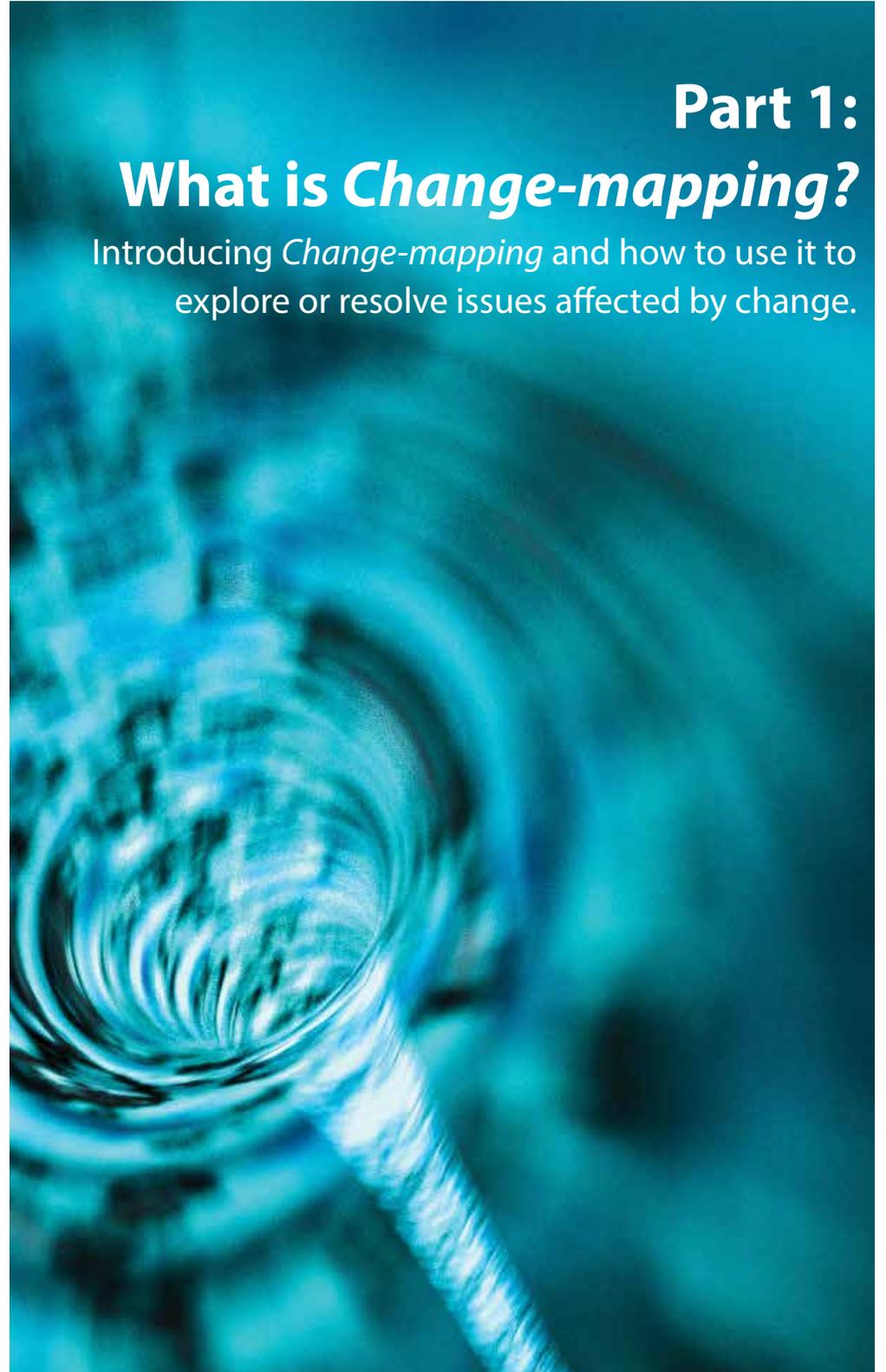
*Change-mapping* breaks down how to map change facing organisations. Each chapter has an explanation of a key point, simple exercises and diagrams.



## Part 1:

# What is *Change-mapping*?

Introducing *Change-mapping* and how to use it to explore or resolve issues affected by change.



# Chapter 1: Introducing Change-mapping

Asking the right questions to find the right answers



**In depth**  
While there are many existing business tools it can be difficult to connect different ones together to produce a cohesive picture of a change issue. *Change-mapping* works by using a simple scalable framework of folders.

Each folder explores or resolves an issue at a certain level of detail. Inside each folder the users can use basic tool-sheets to explore or resolve an issue. If the basic tool-sheets don't provide enough information then more advanced pre-existing tools can be plugged in.

This means that *Change-mapping* can adapt to any issue of any size.

**In this chapter we show the building blocks of *Change-mapping*, a system designed to map issues affected by change. We see why there is a need for *Change-mapping* and introduce missions. *Missions* are like projects in that they tackle an issue except that they can be made up of many projects. We will also see who does what in a mission introducing *Pathfinders*, *Observers* and *Explorers* who all have distinct roles in a mission. As well we introduce *tool-sheets* which are used to gather ideas, information and insights about an issue affected by change.**

## How to use Change-mapping

### General instructions

Have a quick flick through this chapter to become familiar with the main parts of *Change-mapping*. Then look at **Chapter 2** (page 18) to see a simple *Change-mapping* mission in action and then refer back to this chapter to confirm certain details. In addition try the exercises in this chapter to explore the simplest parts of *Change-mapping*.

Missions and use it in other missions. *Change-mapping* can also accommodate much larger missions with more complex issues. See **Chapter 12** for more about different types of missions.

**30 minute exercise**  
The issue is: "Shinrin needs a new exhibition stand". Assemble a small team, one will be the *Pathfinder*\*, one will be the *Observer*\* and the rest will be the *Explorers*\*. Run the simplified mission (see right) to see why Shinrin might need a new exhibition stand. Each folder has a question (blue text) which needs to be answered. When the question has been answered move to the next folder. Basic *Change-mapping* works in the same way except that instead of only one question per folder, there are many questions which are on tool-sheets. **Chapter 02** shows how to run a basic *Change-mapping* mission, with every step shown. \*For more about team members see page 10.



**A typical response to change**  
Rushing to find a solution

"Change is the only constant" to quote the ancient Greek philosopher Heraclitus. Change can often instil panic where an issue requires solving. For example a CEO states "We need a new exhibition stand!" So his team rushes to plan how to build the stand and then has it built. This all seems fine but did anyone stop to ask "Why do we need a new stand?" What if it turned out that an exhibition stand was not the best solution? Another problem can be rushing to a solution which makes it difficult to coordinate between different teams who need immediate access to changing information. While there are different systems to deal with these issues, they can be too complicated or context dependent. This book describes a new more structured approach to mapping change. \*Anpoleon.wikiquote.org/wiki/Heraclitus

**10 minute exercise**  
The issue is: "We need to re-brand the Shinrin organisation!" You have five minutes to think how you would tackle this issue. You may have thought of a rough plan about how to re-brand an organisation. For the last five minutes ask questions about why a re-brand is required and if there may be better solutions than just a re-brand. Should we change this colour to red?

**SHINRIN**  
FOREST MANAGEMENT SYSTEMS

Plan Action

An issue is raised An issue is explored or resolved

**A typical approach to change**  
While this approach may work, it misses important steps, such as asking "Why do we have need re-branding?"

**Introducing Change-mapping missions**  
Are you exploring or resolving an issue?

Change-mapping uses missions to explore or resolve an issue affected by change. An important thing to note is what type of mission you are planning to do. Are you trying to explore or resolve an issue? It might seem obvious that a mission will be to resolve an issue. But before running a mission to resolve an issue typically a mission is run to confirm why it needs changing. Doing this can sometimes reveal that the issue doesn't need changing or maybe it needs changing in a different way to originally imagined.

**30 minute exercise**  
The issue is: "Shinrin needs a new exhibition stand!" Assemble a small team, one will be the *Pathfinder*\*, one will be the *Observer*\* and the rest will be the *Explorers*\*. Run the simplified mission (see right) to see why Shinrin might need a new exhibition stand. Each folder has a question (blue text) which needs to be answered. When the question has been answered move to the next folder. Basic *Change-mapping* works in the same way except that instead of only one question per folder, there are many questions which are on tool-sheets. **Chapter 02** shows how to run a basic *Change-mapping* mission, with every step shown. \*For more about team members see page 10.

Plan what is needed to be in place to meet our chosen option, such as where the option will be done.

Review folder Monitor how the solution went, did it go to plan?

Mission Start folder Our mission is to find out WHY Shinrin needs a new stand. Who will take part in this mission?

Context folder How might the stand affect the organisation and its customers?

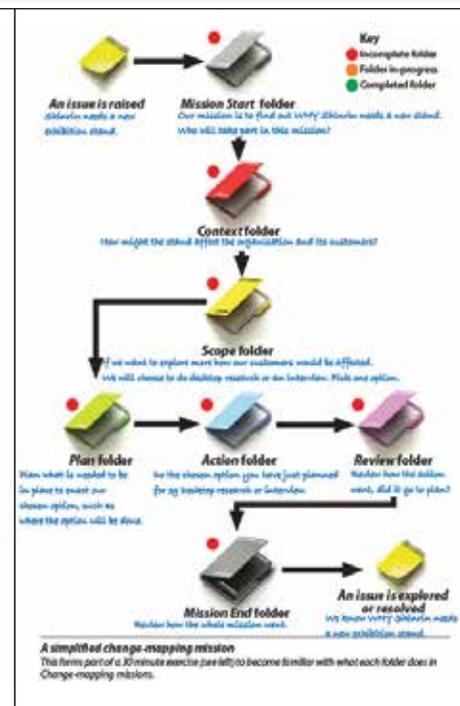
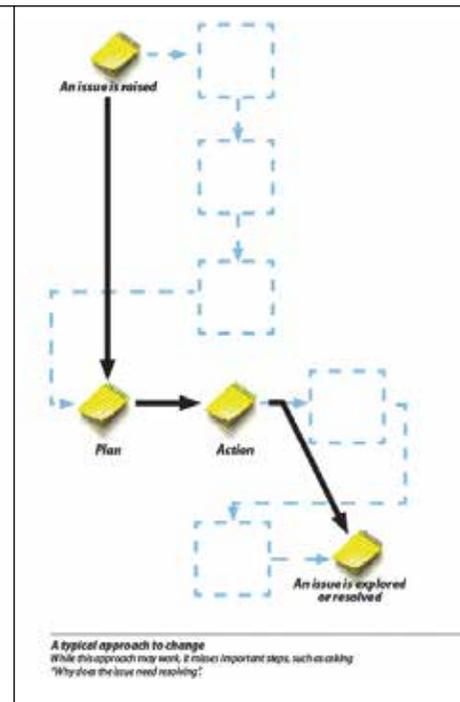
Scope folder If we want to explore more how our customers would be affected, we will choose to do this research on Saturdays. Pick one option.

Action folder For the chosen option you have just planned, for eg building research on Saturdays, what do we need to do?

Mission End folder Monitor how the whole mission went.

An issue is explored or resolved Why have we got Shinrin - why a new exhibition stand?

**A simplified change-mapping mission**  
This forms part of a 30 minute exercise (see left) to become familiar with what each folder does in *Change-mapping* missions.



This chapter introduces the main parts of *Change-mapping*.

## A typical response to change

Rushing to find a solution



### In depth

When faced with change a typical response is to rush to solve it with a plan and then enact the plan. Rushing to find a solution (or *solutioneering*, as it is often called) can have the potential for extremely costly and even dangerous outcomes for those involved. Working with change is itself a skill, an organisation's processes can change once it better understands how to manage change and the unknown.

**“Change is the only constant”** to quote the ancient Greek philosopher *Heraclitus*\*. Change can often instil panic where an issue requires solving. For example a CEO states “We need a new exhibition stand!” So his team rushes to plan how to build the stand and then has it built. This all seems fine but did anyone stop to ask “Why do we need a new stand?” What if it turned out that an exhibition stand was not the best solution? Another problem can be rushing to a solution which makes it difficult to coordinate between different teams who need immediate access to changing information. While there are different systems to deal with these issues, they can be too complicated or context dependent. This book describes a new more structured approach to mapping change.

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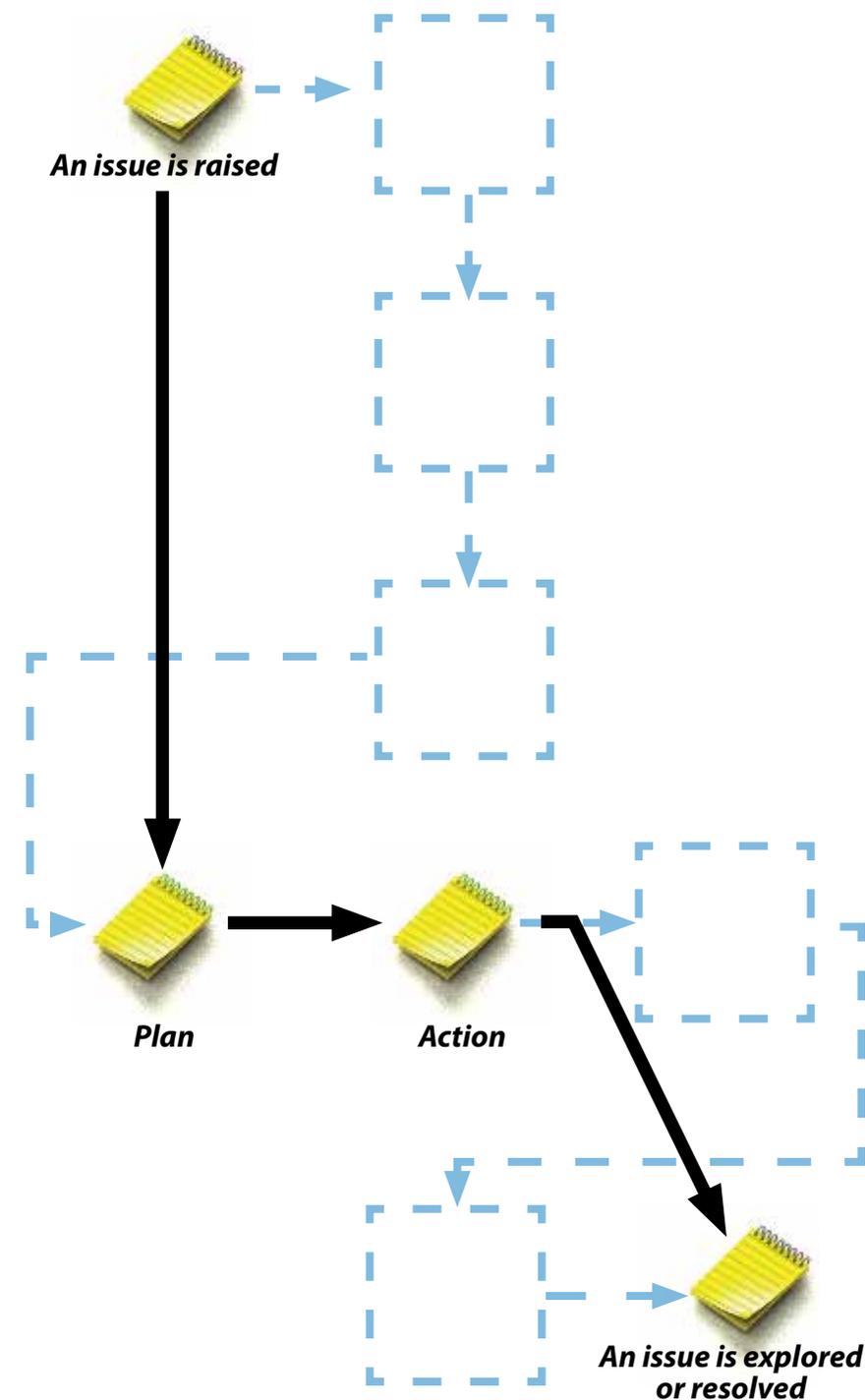
### 10 minute exercise

The issue is: “We need to re-brand the *Shinrin* organisation!” You have five minutes to think how you would tackle this issue. Use this time to think of a rough plan about how to re-brand an organisation. For the last five minutes ask questions about *why* a re-brand is required and if there may be better solutions than just a re-brand.

Should we change this colour to red?



Does the logo work well on social media?



### A typical approach to change

While this approach may work, it misses important steps, such as asking “Why does the issue need resolving”.

# Introducing Change-mapping

Asking the right questions to find the right answers



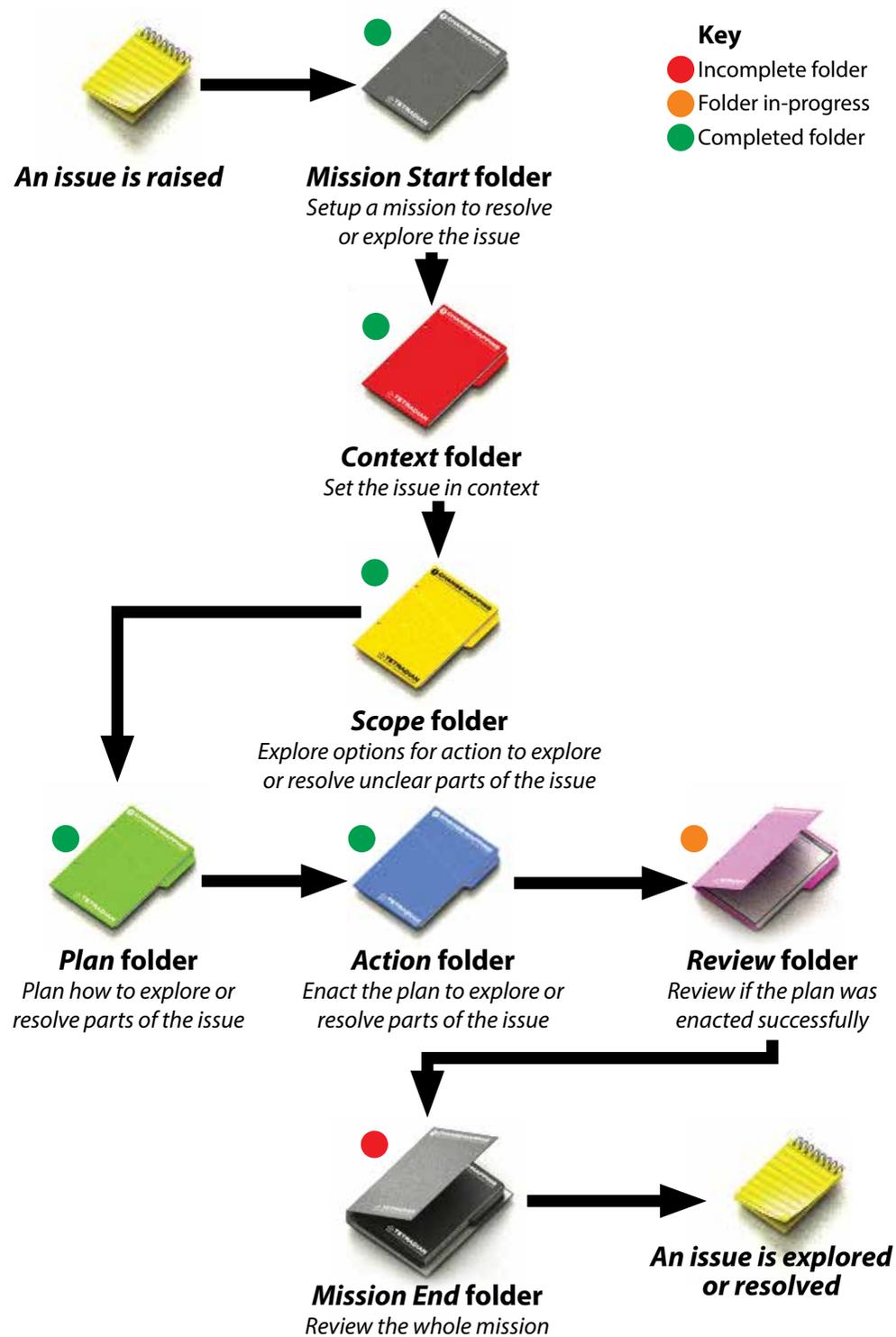
### In depth

The core method of *Change-mapping* is to break any issue into manageable sections which can be examined in the amount of detail required. These sections (shown as folders) are: **Context, Scope, Plan, Action** and **Review**. All of these folders are wrapped up in a **Mission Start** and a **Mission End**, to help you keep track of everything. Each folder depends on the others, because information found will flow up and down between the folders as you find out more about the issue and then how to solve it. *Change-mapping* is not a rigid step by step. At each stage you check that you are not moving out of context or creeping out of scope. This also avoids plans that are hopelessly out of touch with the real world.

**Change-mapping** uses a structured approach to guide change. The system works by taking a small team of people and running a **Mission** to explore or resolve a change issue. Each mission is split into folders. Each folder looks at the issue from a certain perspective to allow your team to ask the right questions to find the right answers. In each folder are a set of tool-sheets with questions designed to help you gain ideas, information and insights about the issue.

### 10 minute exercise

The issue is: "We need to re-brand the Shinrin organisation!" Briefly look at the diagram on the right and imagine how you might approach the re-brand exercise by splitting the issue into parts. In the **Mission Start** folder state if the mission is to explore or resolve the issue. In the **Context** folder set the issue in context. In the **Scope** folder pick one part which is unclear to explore or resolve further. In the **Plan** folder plan how to explore or resolve it further in broad detail. In the **Action** folder enact the plan. In the **Review** folder review how that proceeded. And lastly in the **Mission End** folder review if the whole very simple mission achieved what was stated in the **Mission Start** folder. This is a highly simplified version of a *Change-mapping* mission, the next page shows in more detail how missions work.



### A more structured approach to change

*Change-mapping* breaks a change issue into folders, these sections are linked by a pathway (black arrows) and a simple signalling system (coloured circles).

# Introducing Change-mapping missions

Are you exploring or resolving an issue?



### In depth

Missions can be stand-alone missions or part of a set of linked missions. *Linked missions* take information from linked missions and use it in other missions. *Change-mapping* can also accommodate much larger missions with more complex issues. See **Chapter 12** for more about different types of missions.

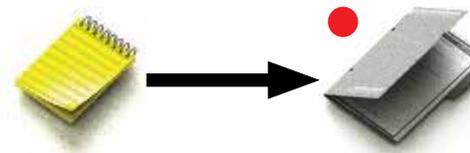
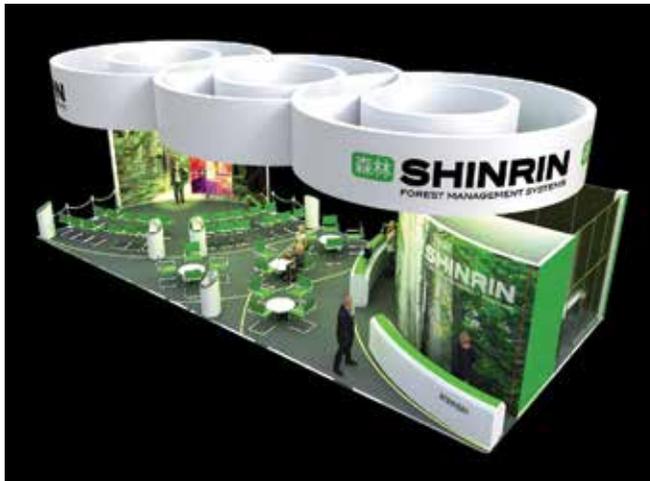
**Change-mapping** uses missions to explore or resolve an issue affected by change.

An important thing to note is what *type* of mission you are planning to do. Are you trying to **explore** or **resolve** an issue? It might seem obvious that a mission will be to resolve an issue. But before running a mission to resolve an issue typically a mission is run to confirm why it needs changing. **Doing this can sometimes reveal that the issue doesn't need changing or maybe it needs changing in a different way to originally imagined.**

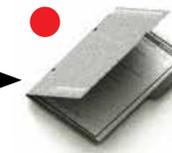
### 30 minute exercise

The issue is: "Shinrin needs a new exhibition stand!" Assemble a small team, one will be the **Pathfinder\***, one will be the **Observer\*** and the rest will be the **Explorers\***. Run the simplified mission (see right) to see why Shinrin might need a new exhibition stand. Each folder has a question (blue text) which needs to be answered. When the question has been answered move to the next folder. Basic **Change-mapping** works in the same way except that instead of only one question per folder, there are many questions which are on tool-sheets. **Chapter 02** shows how to run a basic **Change-mapping** mission, with every step shown.

\*For more about team members see page 12.



**An issue is raised**  
Shinrin needs a new exhibition stand.

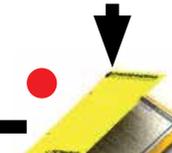


**Mission Start folder**  
Our mission is to find out WHY Shinrin needs a new stand. Who will take part in this mission?

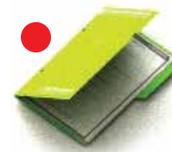
- Key**
- Incomplete folder
  - Folder in-progress
  - Completed folder



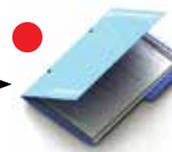
**Context folder**  
How might the stand affect the organisation and its customers?



**Scope folder**  
If we want to explore more how our customers would be affected. We will choose to do desktop research or an interview. Pick one option.



**Plan folder**  
Plan what is needed to be in place to enact our chosen option, such as where the option will be done.



**Action folder**  
Do the chosen option you have just planned for eg Desktop research or interview.



**Review folder**  
Review how the action went, did it go to plan?



**Mission End folder**  
Review how the whole mission went.



**An issue is explored or resolved**  
We know WHY Shinrin needs a new exhibition stand.

### A simplified change-mapping mission

This forms part of a 30 minute exercise (see left) to become familiar with what each folder does in Change-mapping missions.

## Who does what in a mission

The different roles in a basic *Change-mapping* mission



### In depth

#### Are there any other roles?

The roles described here should be all that's needed for a basic change-mapping mission. When the missions increase in size and complexity more specialised roles are likely to be required. These are discussed in brief in **Part 03**, they include: **Librarians**, whose tasks include archiving, storing and distributing information between missions. **Coordinators**, whose tasks include coordinating who does what and when during single and multiple missions. **Architects**, who coordinate multiple missions at the same time.

A *Change-mapping* mission is used to explore or resolve an issue affected by change. A mission will be created to respond to an issue.

An issue might be raised by a member of staff, a client or potentially anyone. The *Issue Raiser* could also be the *Decision Maker* who will decide what to do based on what is found in the mission.

In basic *Change-mapping* missions there is a *Mission Commander* who manages the mission, but doesn't offer insights. Next there is a *Pathfinder* who again doesn't offer insights but keeps the mission on track. There is also an *Observer* who records insights but doesn't offer them. The last main role is the *Explorer*. In basic missions there can be four to twelve *Explorers*. Their main task is to gather insights, ideas and information. If everyone is an *Explorer* a mission can descend into chaos with no insights being captured and recorded.

### 10 minute exercise

*"Smart-watch failing in cold conditions"*

Gather ideas about why a smart-watch might fail in cold conditions. Have one person, the **Observer**, dedicated to capturing ideas. The others will generate ideas, with the **Pathfinder** making sure the exercise stays on task. After five minutes have the **Observer** read what was found. For the last few minutes decide areas which might need more information.



### Issue Raiser

**Number of people:**

1+

#### Duties:

The *Issue raiser* can be a member of the organisation, a stakeholder or potentially anyone. They can sometimes also be the *Decision maker*. They bring the issue to the attention of the *Decision maker* who if required will then set up a mission to explore or resolve the issue.



### Decision Maker

**Number of people:**

1+

#### Duties:

The *Decision maker* most likely will not take part in missions. They often will set up the mission and decide if a mission is required. They may also report to the *Issue raiser* if required about what will happen post-mission.



### Mission Commander

**Number of people:**

1

#### Duties:

The *Mission Commander* monitors how the mission is proceeding and has the final say if no one else can decide what to do next. They most likely will report to the *Decision maker* about what is found.



### Pathfinder

**Number of people:**

1

#### Duties:

Keep the mission on track while allowing unexpected ideas, information and insights to be captured by the *Explorers*. They assist with choosing and using tool-sheets\*. They do not offer ideas, insights and information about the issue.



### Observer

**Number of people:**

1

#### Duties:

Write down the ideas, information and insights the *Explorers* find while using the tool-sheets\* during a mission. They do not offer ideas, insights and information about the issue.



### Explorers

**Number of people:**

4-12

#### Duties:

Using tool-sheets\* capture ideas, information and insights about the issue, which the mission is trying to **explore** or **resolve**.

\*For information about tool-sheets see page 16.

### The main roles in basic Change-mapping

The image above shows the main roles in basic Change-mapping.

# How to set up a mission

What your team will need to successfully run a mission



## In depth

The mission shown in detail on **page 18** is a simplified example of a basic mission. This allows the new user to see how everything works rather than overloading them with information. As you become familiar with all the parts that make up *Change-mapping* more parts will be introduced. *Change-mapping* has been designed to be used on any issue of any size or complexity. These larger and more complex missions and how *Change-mapping* can be used on them is described in **Chapter 3** and also **Chapter 12**.

**Basic *Change-mapping* missions are quick to setup (see below). Each mission has a dedicated *Mission Start* folder with two tool-sheets (see right) which are used to set up the mission by posing questions such as: What is the issue, Who is involved and other similar questions. Most probably the most important things needed to set up a mission are: **An issue which needs to be explored or resolved. A decision whether to explore or resolve the issue.****

## How to set up a basic mission

General instructions  
You will need:

**4-12 Explorers\*** to capture ideas, information and insights during a mission.

**1 Pathfinder\*** who will make sure the Explorers stay on the task, while allowing unexpected insights to occur.

**1 Observer\*** who will note down all the teams findings on the tool-sheets and additional paper if required.

**Photocopies of the blank tool-sheets.** See **Part 2** (page 60) for a selection of basic tool-sheets. You will need at least one set of the tool-sheets from each of the seven folders.

**An issue** which needs to be explored or resolved.

**A dedicated area** for the mission to be conducted.

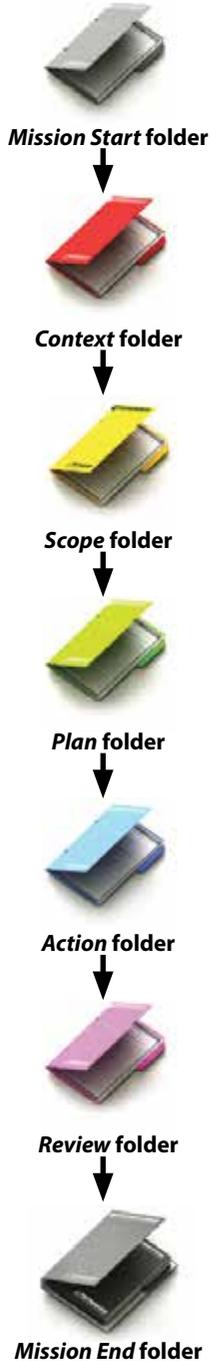
**Additional pens and paper**

\*See page 12 for more details about the roles in *Change-mapping*.

Each mission will use tool-sheets to capture ideas, information and insights. A mission has seven types of folders each with colour coded tool-sheets.

# How to use mission tool-sheets

Tool-sheets to gather ideas, information and insights



The cornerstone of any mission are the tool-sheets. They don't give solutions to problems. A pre-packaged solution might work for certain issues and fail miserably in others. Tool-sheets take a different approach by posing questions enabling a team to find the right answers. The basic tool-sheets pose generic questions allowing a team to fill in gaps about an issue. Rather than a pile of questions, the tool-sheets pose questions about a specific part of the issue. To help identify the tool-sheets they are colour-coded. Each tool-sheet will be associated with a certain folder within *Change-mapping*, as shown on the diagram on the left.

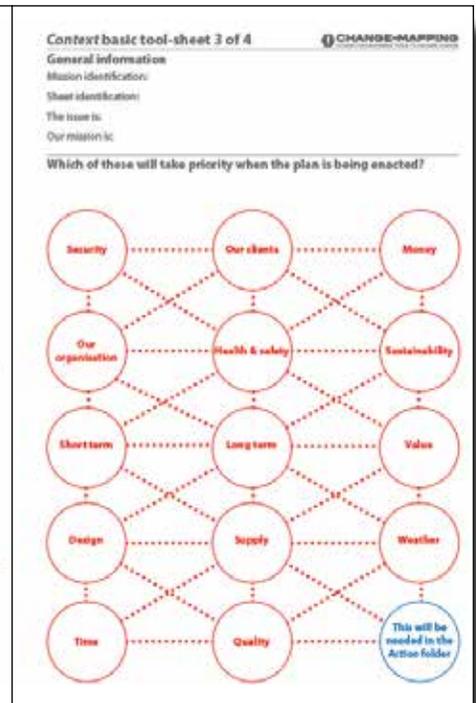
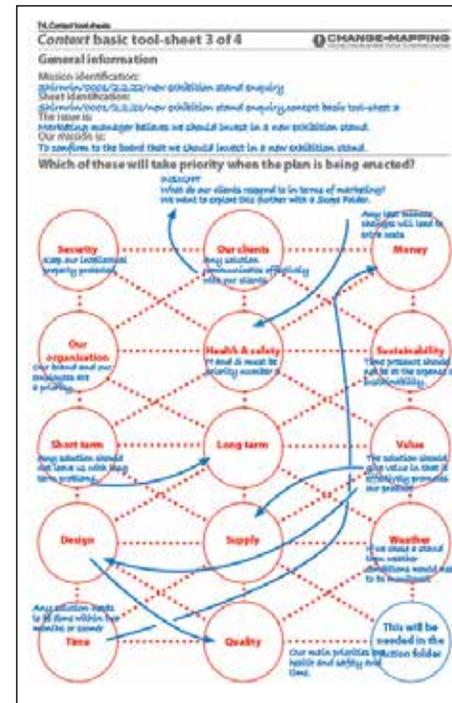
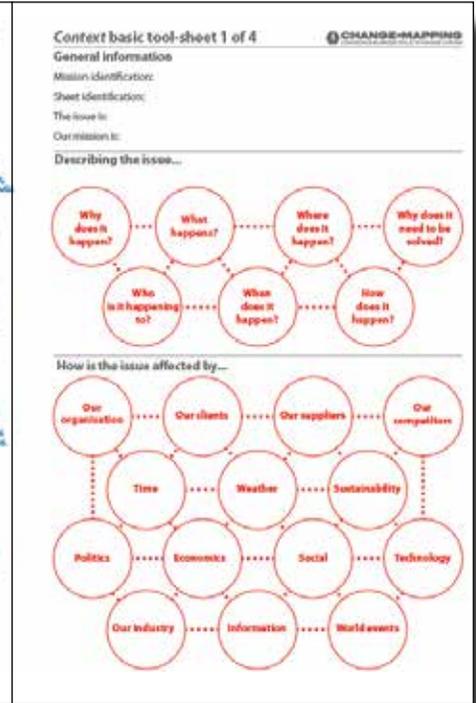
## How to use the tool-sheets

### General instructions

**You will need to photocopy the blank tool-sheets when running missions to explore or resolve an issue. See Part 2 for a selection of basic tool-sheets.**

These tool-sheets are designed to be used by a small team of 4-12 *Explorers\** to capture ideas, information and insights during a mission. A *Pathfinder\** will make sure the Explorers stay on the task, while allowing unexpected insights to occur. An *Observer\** will note down all the team's findings on the tool-sheets and on additional paper if required. Each tool-sheet has a general information section which is used to identify the issue, mission and the tool-sheet itself. It is strongly recommended to **not** skip certain folders as this can lead to errors when using *Change-mapping*, see [page 52](#) for more details.

Each section of the tool-sheet with circles asks the team to describe part of the issue. The circles are not meant to be answered in any order, but rather to start conversations. The questions in the circles are not meant to cover every possible question, but rather the team will add their own context specific questions to the generic questions. If you can't answer a question either skip it (*stating why*) or see [page 58](#) for advice about how to answer these questions. *\*See page 12 about the roles in Change-mapping.*



Every tool-sheet page has a filled in version (blue text and arrows) to show you how to use it and a blank version which can be photocopied for your own missions.