System Scan

Companion to Catalyst Leadership | *John Coné*

See what is producing what you see

When something important is not working, leaders naturally move toward action. Fix the process. Clarify accountability. Train the people. Change the incentives. Add resources. Replace the technology. Make the decision. Any of those may eventually be appropriate.

But before deciding what to change, the Catalyst Leader asks: What is it about the system that is producing this result? And then asks a second, less familiar question: How well is this system equipped to generate a response when the next problem is one we did not anticipate? The System Scan helps you examine both.

It is not intended to produce a complete organizational diagnosis. It is a disciplined way to see enough of the system to make a better decision about where—and how—to intervene.

Use it on one real problem or opportunity at a time.

BEGIN WITH WHAT YOU SEE

What problem, opportunity, recurring result, or unexpected development are you examining?

What makes this issue consequential?

What are you currently tempted to do about it?

Write down your first instinct before doing the scan.

Keep that answer. You will return to it at the end.

LEVEL 1: SCAN THE PERFORMANCE SYSTEM

Begin with the familiar problem: Why is this system producing the result we are getting rather than the result we want?

Look at the work through five questions. Do not assume that all five contain a problem. You are looking for the few conditions that appear to make the biggest difference.

1. WHAT IS THE WORK ASKING PEOPLE TO ACCOMPLISH?

Before examining the people, make sure the required result is actually clear.

Ask:

What result is required?

How clearly is that result understood?

Are priorities clear when objectives compete?

Are important boundaries understood?

Do people know what they can decide?

Are standards useful and current?

Are different parts of the organization asking for incompatible things?

Are we measuring what actually matters?

What do I notice?

What is unclear, conflicting, or unnecessarily restrictive?

2. WHAT MAKES THE WORK EASIER OR HARDER TO ACCOMPLISH?

Look at the environment in which the work occurs.

Ask:

Do people have the information they need?

Do processes help or impede the work?

Do tools and technologies support the work?

Are resources available when needed?

Are workload and time expectations realistic?

What dependencies create delay or friction?

What organizational boundaries get in the way?

What requires unnecessary approval or escalation?

Where does the design of the work itself make good performance difficult?

What do I notice?

What friction has become so familiar that we may no longer notice it?

3. WHAT CAPABILITY DOES THE WORK REQUIRE?

Now examine the people doing the work—but do not automatically assume that they are the problem.

Ask:

What knowledge is required?

What skills are required?

What judgment is required?

What experience matters?

Do people understand the larger context in which their decisions occur?

Can they access expertise they do not personally possess?

Are we asking people to exercise judgment they have had little opportunity to develop?

Are there capabilities the work now requires that it did not require before?

What do I notice?

Is there evidence of a genuine capability gap? If so, what is it?

4. WHAT DOES THE SYSTEM ACTUALLY ENCOURAGE?

Organizations often encourage one behavior while saying they want another.

Ask:

What gets rewarded?

What gets recognized?

What attracts positive management attention?

What gets criticized?

What happens when someone takes initiative?

What happens when someone makes a reasonable mistake?

What happens when someone challenges an established assumption?

What behaviors advance careers?

What do our measures implicitly tell people matters most?

What does the behavior of leaders signal about what is really safe and valued?

What do I notice?

Where does what the system rewards differ from what leaders say they want?

5. HOW DOES THE SYSTEM KNOW WHAT IS HAPPENING?

Performance cannot adjust intelligently if useful information arrives too late, reaches the wrong people, or never appears at all.

Ask:

What information tells people how things are going?

How quickly does it arrive?

Who sees it?

Who does not?

Can people see the consequences of their decisions?

Do customer and employee signals reach people who can act on them?

Are anomalies visible?

What gets averaged away or hidden in aggregate measures?

Can the system detect that circumstances have changed?

What do I notice?

What might be happening that our existing information does not reveal?

STEP BACK

Look across all five questions. What appears most important in producing the current result? Resist the temptation to create an improvement list. Identify the few conditions that appear to matter most.

1. _____

2. _____

3. _____

What evidence supports those conclusions?

What evidence would cause me to change my mind?

That completes the first level of the scan. Now let’s change the question.

LEVEL 2: SCAN THE GENERATIVE SYSTEM

The Performance Scan asks: What is producing today's result?

The Generative Scan asks: How well can this system recognize an unfamiliar need, mobilize around it, discover an effective response, learn from experience, and create capability it did not previously possess?

Examine the six mechanisms.

1. SENSE & INTERPRET

Can the system notice that something important is changing—and make sense of it?

Ask:

Who is closest to emerging changes?

What weak signals are appearing?

What anomalies or contradictions are we seeing?

What are customers, employees, technologies, competitors, or operating results telling us that does not fit our current explanation?

Can information from the edges reach people capable of recognizing its significance?

Are people and technologies looking for what is changing—or primarily reporting what we already measure?

What do I notice?

What might this system be failing to notice?

2. CONNECT

Can the right knowledge and perspectives find one another?

Ask:

Who knows something that someone else needs to know?

Can they find one another?

Where is useful knowledge trapped?

Which groups rarely interact even though their knowledge might be valuable to one another?

Who naturally connects otherwise disconnected parts of the organization?

Can people find expertise they do not already know exists?

Can technology help surface knowledge, analogous problems, expertise, or relationships that would otherwise remain disconnected?

What do I notice?

What potentially valuable connection is currently missing?

3. MOBILIZE

Once something important is recognized, can the system organize around it?

Ask:

Can people obtain the attention and resources required to act?

Can expertise move across organizational boundaries?

Does action depend unnecessarily upon senior-leader intervention?

Are decision rights close enough to the work?

Can temporary teams or networks form around emerging problems?

Can people and technologies be brought together quickly when circumstances require it?

What must be escalated that should not need to be?

What do I notice?

What prevents the system from moving when people already know movement is needed?

4. EXPERIMENT

Can the system discover what works when the answer is not already known?

Ask:

Can people test reasonable ideas?

What requires permission?

Can experiments be kept small, bounded, reversible, and safe?

What happens when an intelligent experiment fails?

Do people know where experimentation is permitted and where consistency is required?

Are there places to simulate, model, pilot, or rehearse when experimentation in the live system would be too consequential?

Can technology increase the speed or reduce the cost of responsible experimentation?

What do I notice?

What useful experiment is the system currently unable—or unwilling—to conduct?

5. LEARN

Does experience actually become learning?

Ask:

Do people examine what happened while the experience is still fresh?

Do they distinguish outcomes from explanations?

Are assumptions examined?

Are surprises investigated?

Is contradictory evidence surfaced or explained away?

Do successful experiments receive as much examination as failures?

Does technology-captured experience become accessible to human judgment?

Does the system change what it understands as a result of experience?

What do I notice?

What experience are we repeatedly having without learning enough from it?

6. SPREAD & EVOLVE

Can what is learned travel—and become useful somewhere else?

Ask:

Who else could benefit from what is being learned?

How would they discover it?

Does useful knowledge remain trapped inside projects, teams, functions, or geographies?

Can unfinished knowledge travel—questions, weak signals, hypotheses, anomalies, and failures as well as proven practices?

When learning reaches another part of the organization, is it merely copied or combined with different knowledge and circumstances?

Can one group's learning become raw material for another group's new capability?

Does what spreads continue to evolve?

What do I notice?

What important learning is currently trapped?

THREE QUESTIONS ACROSS THE GENERATIVE SYSTEM

Now look across all six mechanisms. For each, ask:

CAN WE?
Do we possess—or can we access—the capability, information, technology, relationships, authority, and resources required?

WILL WE?
Do our incentives, norms, consequences, priorities, permissions, and leadership behaviors make it likely that people actually will?

FAST ENOUGH?
Can the system do it at the speed changing circumstances require? A capability that exists but cannot be mobilized in time may have little practical value.

WHAT IS THE SYSTEM TELLING YOU?

You have now looked at the issue twice:

Level 1: What is producing today's performance?

Level 2: What is affecting the system's ability to generate tomorrow's capability?

What conditions appear to be limiting today's performance?

What conditions appear to be limiting generative capability?

Which conditions appear on both lists?

You will want to pay particular attention to those. A condition that constrains today's performance and tomorrow's capability may offer unusually important leverage.

RETURN TO YOUR FIRST INSTINCT

At the beginning of the scan, you wrote what you were initially tempted to do. Read it again. After seeing more of the system, would you still take the same action?

YES / NO / PARTLY

What has changed in how I understand the problem?

What do I now believe is most important to investigate or change?

DON'T TRY TO FIX EVERYTHING YOU FOUND

A System Scan will almost always reveal more possible interventions than you should pursue. That is not a problem with the tool. It is actually the reason for the next one.

The purpose of seeing the system is not to create a longer action list. It is to see enough of the system to make a better choice about where to intervene.

End with one question: Where in this system might a focused intervention produce a disproportionate improvement in both the immediate result and the system's capacity to generate capability?

Write down your best possibilities.

1. _____

2. _____

3. _____

Don't choose yet. First, look at how a completed System Scan might work.

A SYSTEM SCAN IN PRACTICE — A WORKING EXAMPLE

The Problem

A company has given its regional leaders greater authority to handle unusual customer pricing requests. But regional managers continue to escalate many of those decisions to headquarters. Senior leaders are frustrated.

The initial diagnosis

We empowered them, but they won't use their authority.

The leader's first instinct

Clarify that regional leaders already possess the authority. Tell them to stop escalating decisions they are expected to make. Hold them accountable for exercising judgment. That might work. But first, the leader conducts a System Scan.

LEVEL 1: WHAT IS PRODUCING TODAY'S RESULT?

What is the work asking people to accomplish?

Regional managers are expected to make pricing decisions within broad financial parameters.

The formal decision rights are reasonably clear.

So this is probably not the principal problem.

What makes the work easier or harder?

Regional managers can see local customer information, but headquarters has access to enterprise profitability data, contractual history, and information about customer relationships in other regions.

Managers therefore possess the authority to decide without always possessing the context they believe they need.

This is potentially important.

What capability does the work require?

Regional managers understand pricing and their local markets.

But unusual cases require judgment about enterprise-wide tradeoffs they encounter infrequently.

They have had relatively little opportunity to develop that judgment.

Also potentially important.

What does the system actually encourage?

Managers remember occasions when unusual pricing decisions were questioned afterward by headquarters. Escalating a difficult decision has almost no downside, but making it locally can carry consequences.

The formal message is: Use your judgment.

The experienced message may be: When in doubt, escalate.

This is an important signal.

How does the system know what is happening?

Headquarters sees the escalations.

What it does not systematically capture is why managers escalated, what information they believed they lacked, how headquarters reached its decision, or whether similar situations are appearing elsewhere.

Another important factor.

Performance Scan conclusion

The problem may not primarily be unwillingness to exercise authority. The organization has distributed decision rights more rapidly than it has distributed the information, experience, and confidence required to exercise unfamiliar judgment.

LEVEL 2: WHAT IS HAPPENING TO GENERATIVE CAPABILITY?

Sense & Interpret

Unusual customer requests may contain useful signals about changing customer behavior.

But the organization treats them primarily as pricing exceptions rather than possible market intelligence.

Weak.

Connect

Managers facing unusual cases have no easy way of finding colleagues who have encountered analogous situations.

Knowledge that could help is distributed but poorly connected.

Weak.

Mobilize

Managers can reach headquarters, but expertise elsewhere in the regional network is difficult to locate quickly.

The easiest path is upward.

Moderate to weak.

Experiment

Within pricing limits, managers technically have room to act.

But concern about having a decision questioned afterward makes experimentation feel riskier than policy suggests.

Possible in theory; constrained in practice.

Learn

Headquarters resolves each escalation, but little attention is paid to what the case teaches about customer behavior or managerial judgment.

The problem gets solved.

The experience is largely consumed.

Weak.

Spread & Evolve

The reasoning behind headquarters decisions rarely travels back beyond the manager who raised the issue.

A manager in another region may encounter an analogous situation the following week and begin again.

Very weak.

THREE QUESTIONS ACROSS THE SYSTEM

CAN WE?

Mostly. The organization possesses considerable relevant knowledge and expertise.

WILL WE?

Not consistently. Existing consequences make escalation safer than exercising unfamiliar judgment.

FAST ENOUGH?

Often not. Relevant knowledge exists, but finding and mobilizing it takes too long.

RETURN TO THE FIRST INSTINCT

Original response

Tell regional managers to use the authority they already possess and hold them accountable for doing so.

After the System Scan

PARTLY.

Clarifying accountability may still be important.

But the scan suggests that the behavior senior leaders dislike is being produced by more than reluctance.

The organization has:

Distributed authority without equally distributing context.

Created consequences that make escalation comparatively safe.

Failed to connect managers facing analogous problems.

Treated unusual cases as transactions to resolve rather than experiences from which to learn.

Allowed the reasoning behind important decisions to remain largely local.

The question has changed from:

How do we get managers to use the authority we gave them?

to:

How do we create a system in which managers can develop and exercise sound judgment about unfamiliar customer situations without unnecessary dependence on headquarters?

That is a different problem. And it creates several possible places to intervene.

POSSIBLE PLACES OF LEVERAGE

Possibility 1

Move more enterprise customer and profitability context toward the regional managers making the judgment.

Possibility 2

Make unusual pricing decisions—and the reasoning behind them—visible across regions so experience can accumulate rather than disappear.

Possibility 3

Create a low-friction way for managers facing novel situations to find colleagues who have encountered analogous problems.

All three might help.

Trying to do all three at once may not be necessary. None should be selected merely because it sounds attractive. The Catalyst Leader's next question is:

Where could a focused intervention create the greatest movement in both today's problem and the organization's future generative capability?

That is the search for leverage. And it is the purpose of the next tool:

TOOL 2 — THE IGNITION POINT FINDER

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