

## Joel Barker's Implications Wheel®

# CASE STUDY #1

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**Situation:** A mature organization was forming an affiliated *new business start-up* organization, whose purpose would significantly change the traditional way of conducting a particular aspect of the organization's business. The foundation for this *change* had been built over the previous year. Its success helped to *fuel* dramatic *next steps* sponsored by senior management. The change involved a worldwide, multi-cultural customer base. The implementation team had a *2-day window of opportunity* to assess, explore, and strategically plan their *new business*. This 2-day session represented a *coming together* of a team with varying levels of understanding, acceptance and ownership of *new business implementation*. Opinions on critical issues, approach, and priorities varied throughout the team. The goal was the involvement and unification of the *implementation team* behind a solid strategic direction.

**How the Implications Wheel was Applied:** As part of this 2-day *strategy-focused* session, the Implications Wheel was chosen as a vehicle to explore the implications of four critical implementation *success components* identified by the team and the sponsoring management. The team had no previous practical knowledge of using the Implications Wheel. They chose to not only *learn to use the tool*, but *apply the learning* to their own immediate needs. The Implications Wheel training and *real wheel* session were integrated into *day two* of the 2-day session.

**Special Preparations:** Team members *shared* their opinions on current realities via email and voicemail. From the input, a *core team* selected four *success components* for exploration. Specific *point-of-view options* were also

selected for each of the *success components* to be explored via the Implications Wheel. Implications Wheel *Center Statements* were crafted from the input. *Information fact sheets* were developed for each Implications Wheel team. The *fact sheets* included the *Center Statement*, *background information*, and *exploration point-of-view options* for the team to consider.

**The Issues Explored:** Implications Wheel *Center Statements* were developed to explore the topics below:

- The process of selecting key investment areas.
- Development of a new funding model for the *new business venture*.
- Proposed resource development program.
- Proposed resource management system.

**The Implications Wheel Experience from the User's Point-of-View:** *For the analytics*, it provided a context for strategic thinking. *For the strategists*, it provided a way to express their creativity in the business at hand. *For the leader*, it provided a vehicle for engaging staff members in shaping new paths for the business. It resulted in a 2X increase in involvement over the "norm" experienced with current tools.

**Results Achieved:** ■ Unexpected results identified in the Implications Wheel explorations lead to new strategic focus worldwide. ■ Investment \$\$\$ were shifted from the original ideas for start-up of the business. ■ Target areas were changed and refocused on a few key priorities, most essential to the organization's direction. ■ Opportunities were discovered that were previously missed. ■ The *wheels* were used as a vehicle to build understanding and sponsorship of the strategy with senior management. ■ Senior management

responded with immediate interest, understanding of the concept, and buy-in.

**Lessons from the Implications Wheel Exploration Process:** ■ *Center Statement fact sheets* were critical for providing the context and consistent terminology. ■ With common values and overall goals, the tool works well in a multi-cultural group environment. The scoring system was easy to use; not culture dependent. ■ For success, a strong facilitator role is essential in a multi-cultural group. ■ Exploring led to *missed or ignored opportunities*. ■ There is value in exploring new/expanded strategies via the Implications Wheel before committing \$\$\$ and resources. ■ Scoring and Implications Wheel discussions serve as a way of inviting others into the process that have a desire to influence the strategy. ■ Exploring the implications of the initial direction helped redirect energies toward what was most important.

The Hewlett-Packard custom 2-day meeting session, described in this case study, which incorporated Joel Barker's Implications Wheel, was developed and facilitated by LEADERSHIP SOLUTIONS, Montara, CA.