



# HOW TO HOLD STRATEGIC SESSIONS VIA TRIZ TOOLS

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# Strategic sessions targets

The objectives of strategic sessions may vary, but most often come down **to finding strategic decisions that need to be made for the survival and development of an organization in a changing market environment.**

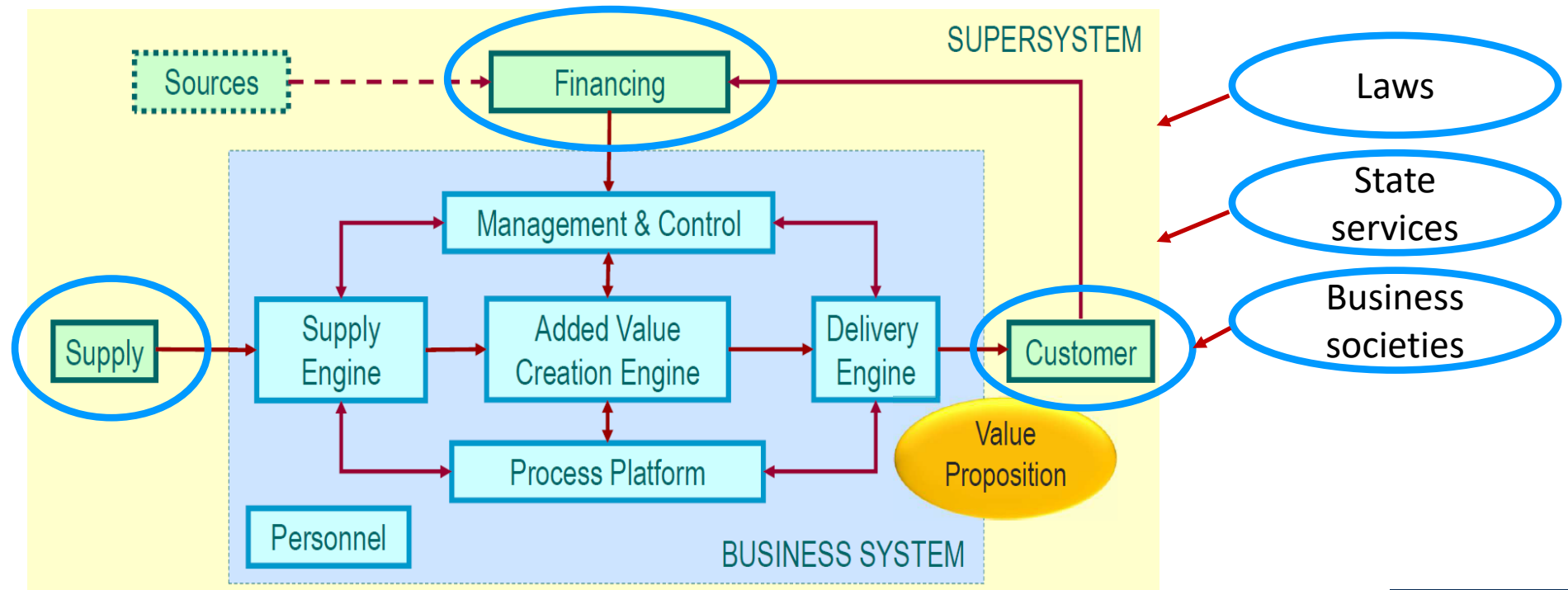
Examples:

1. How, while maintaining the quality of grain products, significantly reducing the capital intensity of production and the required area of the enterprise in order to scale up the business?
2. How to increase reach at least 10 times for a startup Fightingnet?
3. How to provide Russia's strategic projects with unique equipment in the face of increasing USA sanctions pressure?
4. Development of measures to support the construction industry in the Ural Federal District in the face of restrictions associated with COVID-19 in 2020 in Russia...

# The main assumption to manage strategic sessions

The main assumption that was postulated when developing a strategic session program is that the value proposition of a commercial organization should maximally meet the requirements of the main stakeholders of the business system and key supersystems →

**The main tool** is one of verity of MPV-analysis approach.



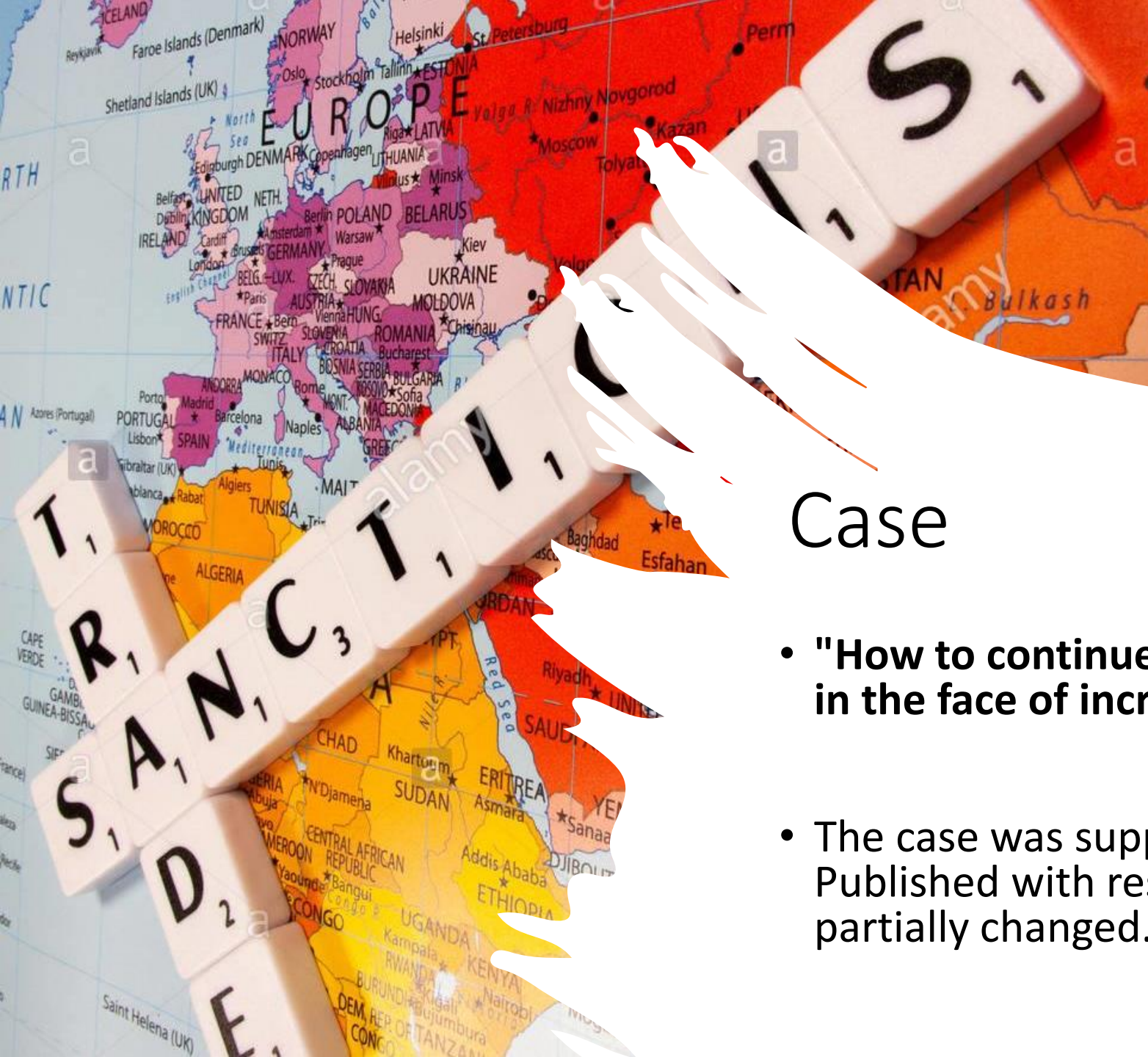
# The strategic session is holding in the following sequence:

1. Statement of the strategic goal as a problem.
2. Schematization of the inventive situation.
3. Selecting key stakeholders.
4. Determining the requirements of key stakeholders.
5. Choice of the target hypothesis.
6. Determination of the degree of compliance with the requirements of stakeholders in the framework of the selected target hypothesis.
7. Definition of gaps.
8. Selection of preliminary solutions for finding gaps.
9. Determination of secondary undesirable effects.
10. Modeling technical contradictions.
11. Resolution of contradictions.
12. Analysis of the obtained transformations and preparing list of requirements.

# TRIZ tools (**in bold**) and other tools using into strategic session methodology

<b>N</b>	<b>Activity</b>	<b>TRIZ tools and other tools</b>
1	Statement of the strategic goal as a problem.	<b>Administrative contradiction.</b> <b>Description of innovative situation (IBTA).</b>
2	Schematization of the inventive situation	Schematization.
3	Selecting key stakeholders.	Schematization.
4	Determining the requirements of key stakeholders.	<b>MPV-analysis.</b>
5	Choice of the target hypothesis.	<i>See the paper</i>
6	Determination of the degree of compliance with the requirements of stakeholders in the framework of the selected target hypothesis.	<b>MPV-analysis.</b>
7	Definition of gaps.	<b>MPV-analysis.</b>
8	Selection of preliminary solutions for bridging the gaps.	Brain storming. <b>List of Contradictions in ITB form.</b>
9	Determination of secondary undesirable effects.	Brain storming. <b>List of Contradictions in ITB form.</b>
10	Modeling contradictions.	<b>Technical contradictions.</b>
11	Resolution of contradictions.	Contradiction analysis. <b>Inventive Principles.</b> <b>IFR + Resources for business TRIZ.</b>
12	System assembly and analysis of the obtained transformations.	Mind Map. <b>Multicriterial matrix of solutions (IBTA).</b> <b>Ideas Landscape (IBTA).</b>





## Case

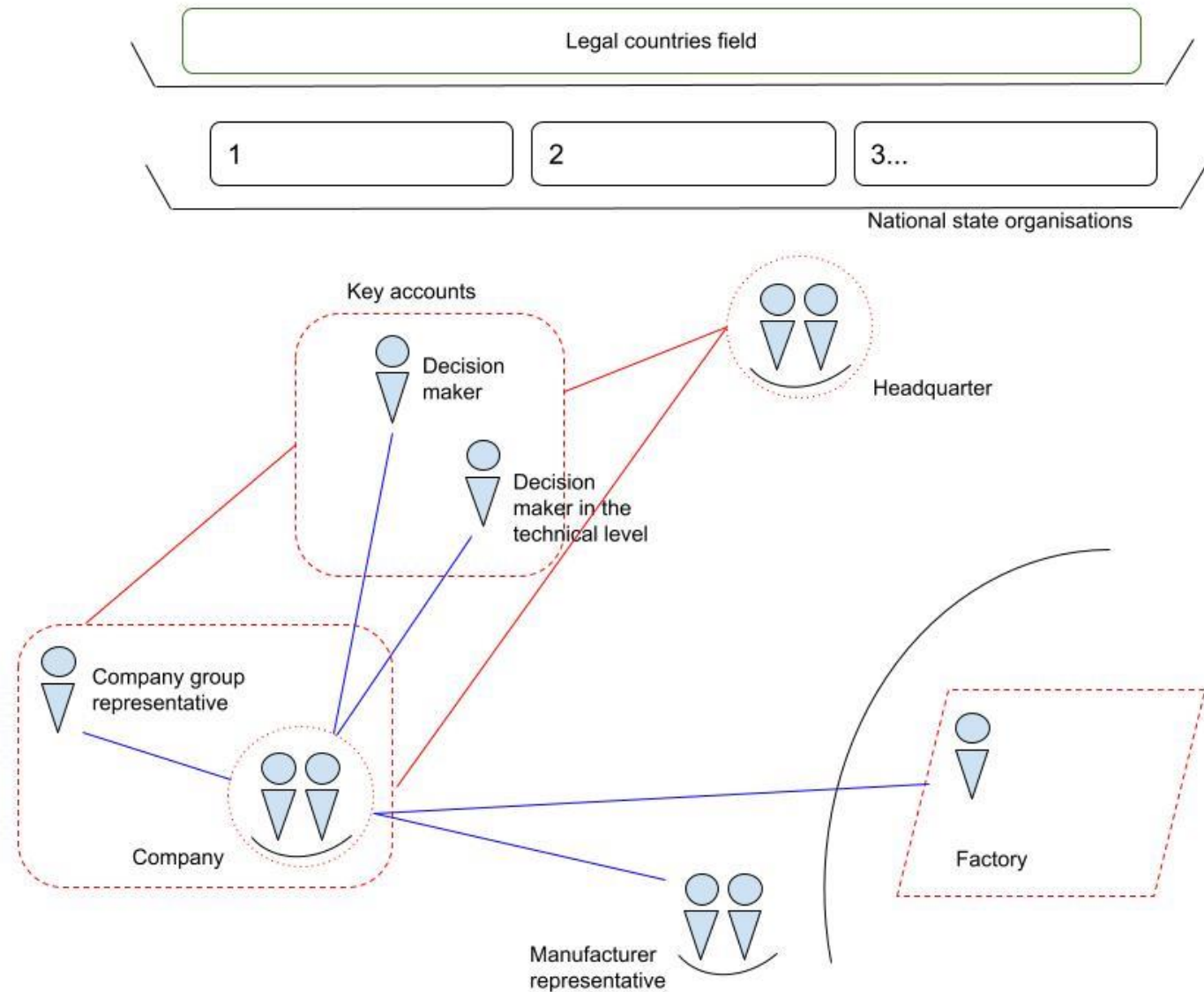
- "How to continue deliveries of unique equipment in the face of increasing USA sanctions pressure?"
- The case was supplied by a distribution company. Published with restrictions. The material has been partially changed.

# Step 1. Administrative contradiction

- **Problem:** in the context of the sanction restrictions, difficulties arise with the supply of electronic measurement equipment for company X.
- **Purpose:** to develop measures to preserve the distribution business.
- **System and supersystem elements:** company, suppliers, competitors, legal framework, consumers in the target area.
- **Limitations:** solutions must be in the legal framework.

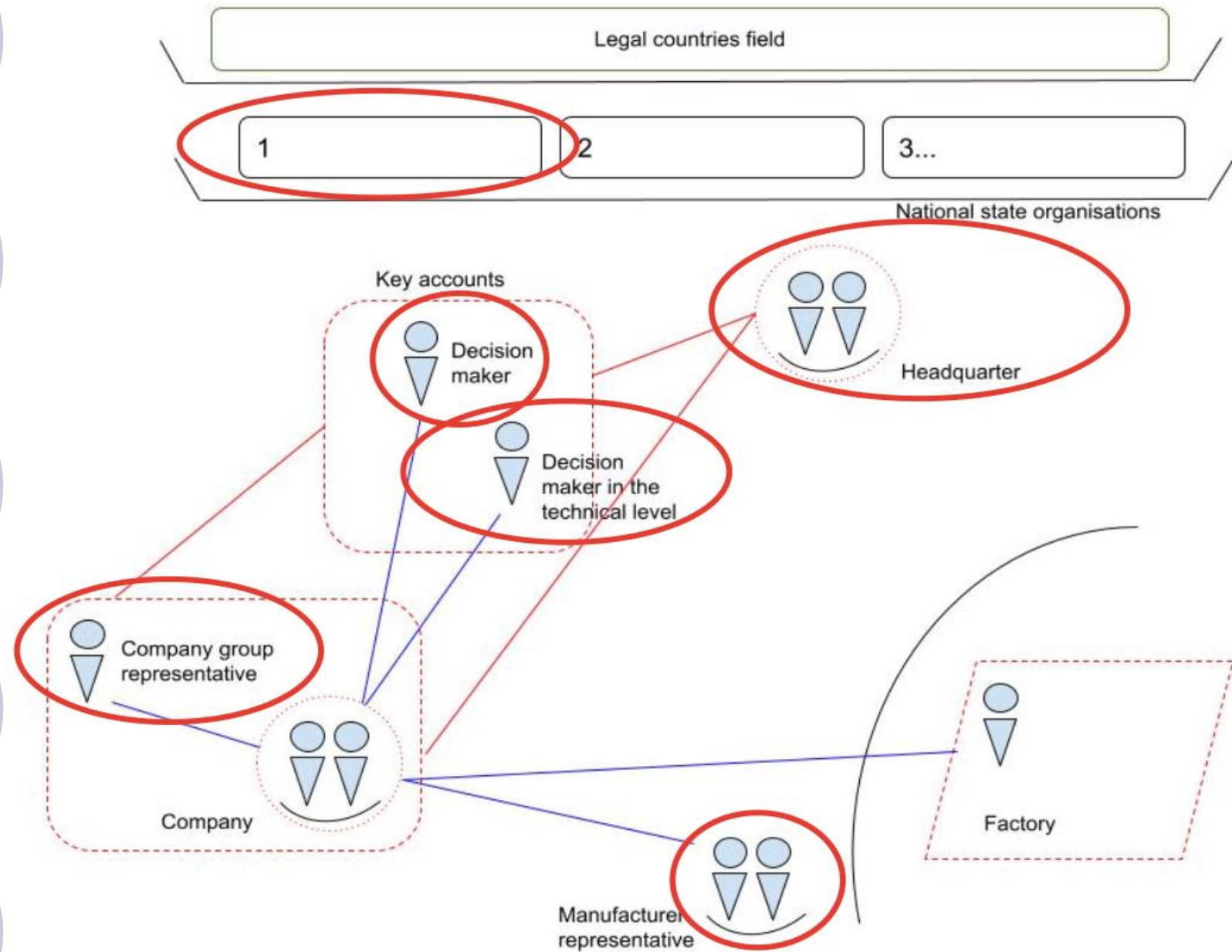


## Step 2. Schematization of the initial situation.





Step 3.  
Highlighting key  
stakeholders on  
the diagram.

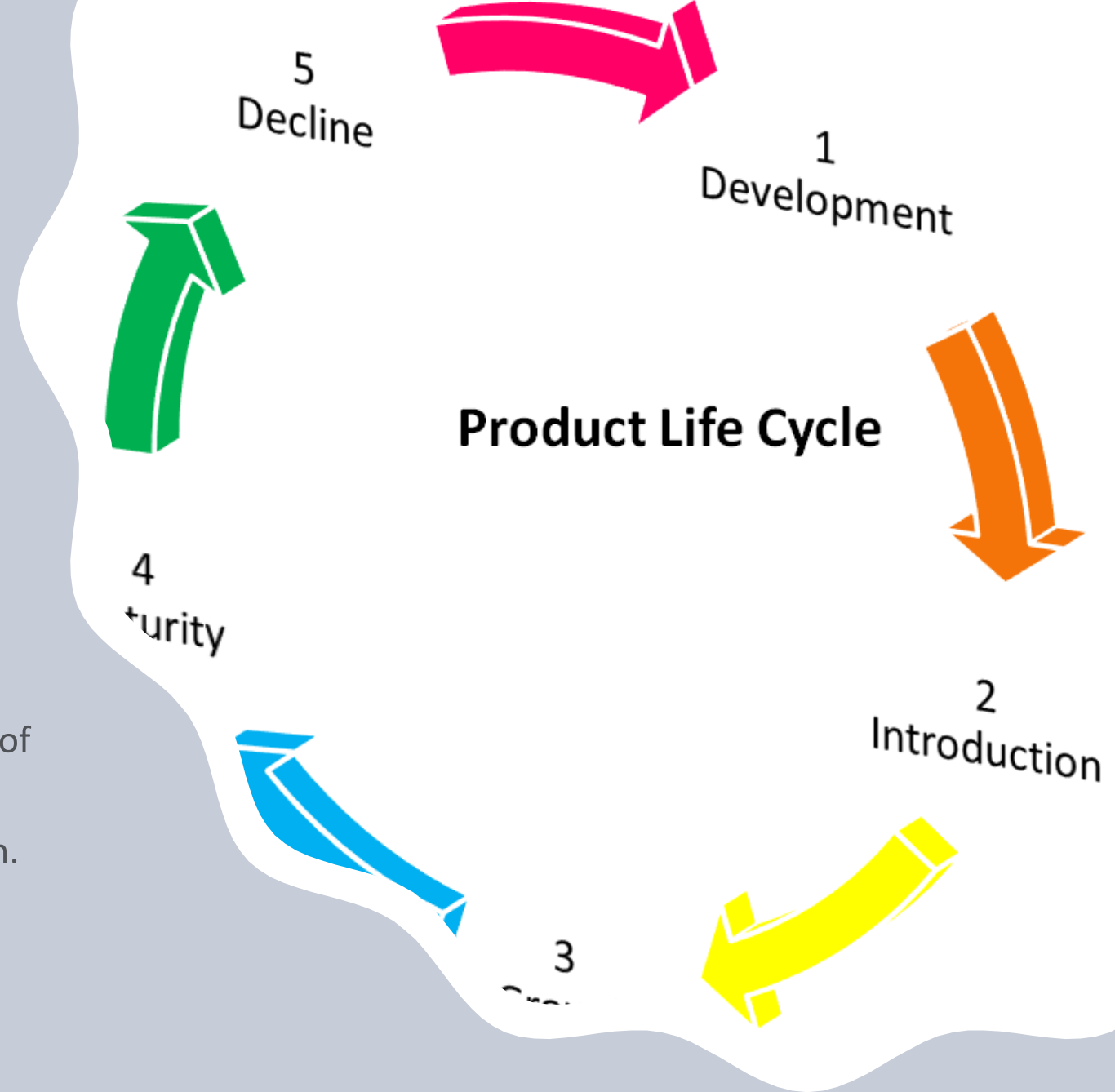


## Step 4. Determination of the Stages of the process life cycle

**Process:** purchase of unique equipment.

### Main steps:

- 1) Determination of the need according to the requirements of the State Program.
- 2) Working out the task with the customer.
- 3) Working with the criteria for making a decision of the customer.
- 4) Coordination and entry into the purchasing plan.
- 5) Tender.
- 6) Contract and placing an order with the manufacturer.
- 7) Delivery according to the contract.



# Step 5. Definition of stakeholder's requirements.

	1	2	3	4	5	6	7
<b>Decision maker on the top level</b>	Compliance of the state program with the capabilities of the customer	Compliance with the terms of reference	Best supplier	Deadline Compliance of the formal requirements	Best supplier	-	Deadline Compliance of the formal requirements
<b>Decision maker on the technical level</b>	Equipment renewal	Compliance with the terms of reference  Proposal optimization	Best supplier	Minimum involvement  Compliance with the terms of reference	Compliance with the terms of reference	-	Trainings of technical staff  Technical support

# Step 5. Definition of stakeholder's requirements.

Company group representative	Quantity of attracting investment	-	Several convenient suppliers-rivals	Purchasing deadline Compliance of the formal requirements	Law compliance	-	Deadline
Head-quarter representative	-	-	Several convenient suppliers-rivals	Purchasing deadline Compliance of the formal requirements	-	-	-

# Step 5. Definition of stakeholder's requirements.

Ministry of Education and Science representative	Quantity of attracting investment  Minimum appropriate scientific base	Local manufacturer priority	-	Compliance of the formal requirements	Compliance with ministry restriction to allow for suppliers to participate in the contracts  Local manufacturer priority	Special accounts compliance  Cash flow control compliance	Deadline  PR to target audience
Manufacturer representative	-	Participation in the contest	Winning in the tender	To be allowed	Creating the terms of reference according to their advantages  Compliance with the anti-corruption agreement for all competitors	Quantity of getting revenues	Compliance with the anti-corruption agreement for all competitors  Deadline  Compliance of the formal requirements



## Step 6. Choice of the target hypothesis

- **Hypothesis 1.** We conditionally believe that the sanctions completely cut off access to necessary equipment. Further, we assume that this resource is 100% closed for the target area.
- **Hypothesis 2.** We tentatively believe that without necessary equipment in the next 5 years, large customers will not be able to solve their strategic tasks. Further, we work with the assumption that this equipment will need to be imported in the target area in any case, and the government will solve this problem at the state level.
- **Solution:** choose the first hypothesis as the most unfavorable option.



Step 7.  
Determination of the  
degree of  
compliance of the  
process with the  
requirements of the  
stakeholders,  
considering the  
chosen hypothesis.  
Identifying gaps

Stakeholder's MPVs	Low	Medium	High
<b>1) Decision maker</b>			
<i>Compliance of the state program with the capabilities of the customer</i>	+		
<i>Compliance with the terms of reference</i>	+		
Best supplier			+
Deadline		+	
Compliance of the formal requirements			+
<b>2) Decision maker in the technical level</b>			
<i>Equipment renewal</i>	+		
<i>Compliance with the terms of reference</i>	+		
Proposal optimization		+	
Best supplier		+	
Minimum involvement			+
Compliance with the terms of reference			+
Trainings of technical staff			+
Technical support		+	

Step 7.  
Determination of the  
degree of  
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Identifying gaps

### 3) Company group representative

Quantity of attracting investment		+
Several convenient suppliers-rivals	+	
Purchasing deadline		+
Compliance of the formal requirements		+
Law compliance		+
Deadline		+

### 4) Headquarter representative

Several convenient suppliers-rivals	+	
Purchasing deadline		+
Compliance of the formal requirements		+

Step 7.  
Determination of the degree of compliance of the process with the requirements of the stakeholders, considering the chosen hypothesis.  
Identifying gaps

5) Ministry of Education and Science representative			
Quantity of attracting investment		+	
<i>Minimum appropriate scientific base</i>	+		
Local manufacturer priority			+
Compliance of the formal requirements			+
Compliance with ministry restriction to allow for suppliers to participate in the contracts			+
Special accounts compliance			+
Cash flow control compliance			+
Deadline			+
PR to target audience			+

Step 7.  
Determination of the  
degree of  
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Identifying gaps

<b>6) Manufacturer representative</b>			
<i>Participation in the contest</i>	+		
<i>Winning in the tender</i>	+		
<i>To be allowed</i>	+		
<i>Creating the terms of reference according to their advantages</i>	+		
Compliance with the anti-corruption agreement for all competitors			+
<i>Quantity of getting revenues</i>	+		
Compliance with the anti-corruption agreement for all competitors		+	
<i>Deadline</i>	+		
<i>Compliance of the formal requirements</i>	+		



Step 7.  
Determination of the  
degree of  
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Identifying gaps

**Notice:**

- Gaps are in italics.
- MPVs of manufacturer representative are not considered further since it depends on the current situation and cannot influence it.

Step 8. Determination of harmful effects and identification of contradictions. Modeling contradictions in the ITB format.

- Unfortunately, not all previous solutions in this work can be published. In some cells of the matrix, intermediate solutions have been removed and replaced with the entry "SOLUTION N ...".

N	IF	THEN	BUT
1	Compliance of the state program with the customer's capabilities is low (compiled by capabilities).	SOLUTION 1	The negotiation process and signing of agreements can take more than 1 year.
2	Compliance of the state program with the customer's capabilities is low (compiled by capabilities).	Conduct a detailed analysis of suppliers from all non-restricted countries.  Conduct a product analysis of approved vendors to select strong solutions (decision revision).	Identified suppliers might not provide the required service support.
3	Compliance of the state program with the customer's capabilities is low (compiled by capabilities).	Conduct a detailed analysis of suppliers from all non-restricted countries.  Conduct a product analysis of approved vendors to select strong solutions (decision revision).	Customer confidence in the brand may be insufficient.

Step 8.  
Determination  
of harmful  
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Modeling  
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the ITB format.

4	Compliance of the state program with the customer's capabilities is low (compiled by capabilities).	Conduct a detailed analysis of suppliers from all non-restricted countries.  Conduct a product analysis of approved vendors to select strong solutions (decision revision).	Insufficient supplier solvency.
5	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	SOLUTION 5	The target channel might be closed down.
6	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	SOLUTION 6	It is prohibited by a law.
7	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	SOLUTION 7	The negotiation process and signing of agreements can take more than 1 year.
8	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	SOLUTION 8	Customer's equipment has access restrictions.

Step 8. Determination of harmful effects and identification of contradictions. Modeling contradictions in the ITB format.

9	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	SOLUTION 9	The risk to lose business.
10	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	Development of devices that meet the requirements of a state customer.	The risk not to get the goal.
11	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	Development of devices that meet the requirements of a state customer.	Unacceptably long process.
12	Compliance of the state program with the customer's capabilities is low (compiled by capabilities)	Development of devices that meet the requirements of a state customer.	The available budget would be not sufficient.
13	Compliance with the terms of reference is insufficient	See above	
14	...		22

## Step 9. Contradiction elimination

You get the goals of the strategic session after resolving of all contradictions.

After doing that you must sum up all solutions with the one mind map to analyze them before getting the road map.





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Thanks a lot for your  
attention!

