

Decision Explorer NEWSLETTER



Issue 2 Winter 1998/99

Welcome!

Welcome to the Winter 1998/99 edition of the Decision Explorer Newsletter. Since the last newsletter we have been working on a variety of projects which we hope will help you in your use of Decision Explorer. Amongst other things, we have released a new introductory document which can be downloaded from our web pages (or which is available - free of charge - in hard copy, either from Banxia Software or Scolari - contact details are given in the "Contacts" section on the back page). The introductory document - entitled "An Introduction to Decision Explorer. Workbook 1" - takes you through the basics of data entry and gives more explanation about various features in the software, as well as giving more explanation about why you might want to do particular things. We know that some lecturers are already using this document as part of their teaching, so it might be of interest if you are a lecturer or trainer.

The software itself has also been improved. For existing users a FREE upgrade patch is available for download (from our web site or via FTP, the details for which appear on your license document). The patch upgrades Decision Explorer to version 3.0.7.

For those of you interested in strategy development, there is a new book which might be of interest to you. Making Strategy: the journey of strategic management, by Colin Eden and Fran Ackermann, was published by Sage Publications, in September 1998. The book takes you through the theory and practice of a strategy making technique, in which Decision Explorer is a key tool, and which Fran and Colin refer to as "journey making" (which stands for jointly understanding, reflecting and negotiating strategy).

Please remember, we are always interested in hearing from you, so if you have any contributions/ comments please let us know.

Jenny Brightman, *Banxia Software Ltd.*

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News

Final NUD*IST export release

Decision Explorer now fully supports import and export to the QSR's NUD*IST text analysis software. In the last newsletter (available from our web pages) we described how to import a coding tree from NUD*IST. You can now take that coding tree, arrange it as you would like, and then export it back to NUD*IST.

More importantly, you can now take a model that you have built up, perhaps of an interview, and export it as an automatically coded text file. Decision Explorer builds you a command file that assigns concepts in sets you have defined in the model to nodes in the coding tree, saving a lot of time.

If you want to try out the import and export facilities, they are fully functional in the demonstration as well as the 3.0.7 release. Existing users can use the FTP facility to get the new version (see your licence card) or download a patch from our web pages.

Extension of training activities in the USA

There are now a number of individuals offering public and private, client based Decision Explorer training courses in the USA. The next public access workshop will be held in Boston, MA on 19th March 1999. Further details are given in the Training section, later in this Newsletter.

Workshop re-run

The training workshop, which was run by the Operational Research Society in Birmingham, was such a great success that a follow on event will be run on Friday February 19th, 1999.

The one day workshop, "Map your way to a better understanding", was tutored by Kenny Forsyth, from PricewaterhouseCoopers. As a practicing consultant, using Decision Explorer in his everyday work, Kenny was able to pass on valuable insights and practical tips, which seemed to be greatly appreciated by all involved. One participant even gave the day 10 out of 10 for everything!

With such positive feedback, and wide expressions of interest, we have scheduled a repeat of this event for February. Booking is now open for this workshop. To ensure that participants get the most out of the day we will only take 8 people for this workshop. If you are interested please contact us for details of fees, venue and workshop description. Email training@banxia.com or call us on 0141 552 3082.

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Using Decision Explorer as a research tool

By **Dr. Seonaidh McDonald**, *Lecturer in the International Business Strategy, Management School, University of Sheffield*

Seonaidh is involved in management research into issues such as strategy making and innovation. Over the past four years Seonaidh has used Decision Explorer extensively in her research as a tool for the management and analysis of qualitative data. She collects data through unstructured and semi-structured interviewing, as well as using techniques such as shadowing and observation. This generates huge amounts of unstructured data and handling it effectively can become a real problem. What is needed is a vehicle to help the transition from a wealth of raw data to a coherent account of the research, which will ultimately be used as a basis for feedback to the client and academic publications.

"You need to get to know that data, to 'play' with it, to explore it, see what is there and draw out themes. Mapping gives a good non-linear, inter-linked summary of what the themes in an interview are. I need to see what I don't have, to contrast different peoples' views of what is real."

Part of the problem with qualitative research is how to get from this very rich account into a linear report. Decision Explorer helps do this because it is not asking for a linear account. It allows you to spread your thoughts out on the page and build commentary in as you go along.

Another strength of using maps and Decision Explorer is that you can use it as a tool with other researchers to give feedback and information about the data which has been gathered. A map provides a good focus if you are working in a research team, as not everyone can do, or be at, every interview. Sharing the data and developing your understanding of it can become an issue, so the maps can be used to overcome this. A map can be used to provide a manageable summary of the data, without losing the complexity of the data that the interviewee conveyed.

The theoretical framework that Seonaidh uses is Activity Theory. One of the important premises of Activity Theory is trying to represent the world in all of its complexity, "What I want my writing to show is how everything is inter-linked, how complex reality is, how different realities can exist together and it is very important to me to maintain but to understand that complexity. I don't want to 'black and white' this data all of a sudden, I don't want to degrade it". Mapping makes a good middle step between a 'mess' of raw data and a sophisticated account of research issues. At a later stage you can also examine the map for factors or relationships that are counter intuitive or are counter productive within the company. This can help you make recommendations to the client organisation.

Mapping helps you not only to highlight contrasting opinions but also to see them in context and to work with them. If someone tells you a story in a company about something that happened last week, and the next day someone else tells you another, different story about the same incident, they are different but they are both true. Qualitative research is full of this kind of contradiction. With mapping there is no need to privilege one account over another, you can have them both.

Seonaidh does not use mapping in a reflexive way with clients but uses it extensively for her own reflection and synthesis processes, "It is something that I use more on a private level - when I am trying to write, when I am thinking about what I want to say. If I am going round in circles and I don't know where to start and I can't write it, I map it instead! That is one of the greatest strengths of it. I find it quite natural to use. It helps to draw out the essence of the issues that I am trying to frame".

An extended version of this article is available from our web pages, and as part of the case study pack. If you would like a copy of full article, please contact us.

Recent publications

If you have had any articles, case studies or papers published recently which deal with cognitive/ cause mapping issues and/or the application of Decision Explorer then please let us know and we will publicise them here, we will also add the reference for your publications to the bibliography which will be maintained on our web pages.

Eden, C & Ackermann, F. (1998). *Making Strategy: the journey of strategic management*. Sage Publications, London.

Jenkins, M. & Johnson, G. (1997). *Entrepreneurial Intentions and Outcomes: A Comparative Causal Mapping Study*. *Journal of Management Studies*, 34, 6, November, 895-920.

Jenkins, M. & Johnson, G. (1997). *Linking Managerial Cognition and Organisational Performance: A Preliminary Investigation Using Causal Maps*. *British Journal of Management*, 8, Special Issue, June S77-S90.

Jenkins, M. (1996). *Making Sense of Customers: An Evaluation of the Role of the Customer in the Subjective Strategies of Senior Managers*. *Journal of Strategic Marketing*, 4, 95-115.

Exploring some of the less known features in Decision Explorer

From time to time we are asked questions such as "how do I merge models?" And "what is the easiest way to share models between users in a project team?" We thought that we would take this opportunity to talk you through the answers to these questions and, in the process to introduce you to some of the less well known facilities in Decision Explorer.

Merging models.

A common method when working with a group is to start by interviewing each group member separately, and mapping their ideas about the problem or issue which is the focus of the study. In these individual interviews it is likely that the maps will have been recorded using pencil and paper, rather than entered directly into Decision Explorer (although the interviewer can, of course, use whichever method he/she considers to be the most appropriate for eliciting and recording the maps). If the maps have been taken down on paper (and not entered directly into Decision Explorer), then it is a straightforward task to enter the information into Decision Explorer, ready for analysis and merging. Having started with a paper based process, the computer models may be used for feedback to the individual interviewees, or as the basis for second interviews, before moving on to the group process. The composite map, which is the result of the merging process, will then be used in the group meetings to facilitate negotiation about the issue.

The map merging process can be carried out as follows: create a new, empty model (you might want to name it "group"). Open the model for the first interview that will contribute to your group model. Select all of the concepts in the model (assuming that you are using the whole map). The command "SC = L" is one way to do this, it asks Decision Explorer to make the set of selected concepts (SC) equal to the list (L) of all of the concepts in the model. Alternatively hold CTRL down while selecting the edit menu Select All item. You then use the standard Windows copy and paste options to transfer the contents of the individual interview model into the group model. Select the Copy option from the Edit menu, switch to your group model and paste in the concepts from the clipboard. You can then repeat this for each interview model.

An issue that you will have to consider is that of concept numbering. The standard option when Decision Explorer transfers concepts between models is to "ensure separation" i.e. no overlap in concept reference numbers. After transferring the first set of concepts to your group model you want Decision Explorer to renumber the concepts from subsequent models, you can do this either by selecting the 'Ensure separation' paste option. Or, an alternative is to renumber the concepts before you copy them across. You might number all of interview 1 as 1 to 99, interview 2 as 100-199, interview 3 as 200-299 and so on. This makes it easy to identify the original interview source. Renumbering to fit a range is done using the Edit menu Renumber item. (You also have the option to "shuffle" concepts afterwards using the Mix command if you need to "anonymise" the model.

Now you have a model with the data from multiple interviews, but the groups of concepts are all separate "islands". The process of merging now begins in earnest. There is no "magic way" to do this, but a good way to start is to use the FIND command to look for key words that you think have occurred in more than one model, for example "market~" or "Europ~". You then look at ideas that appear to be similar - for example "achieve greater market share" and "expand our market". Use the MAP or X commands to view each concept in context, to check that they are actually talking about the same thing. If they are, use the concept merge command to combine them. If they have the same phrase but a different meaning, a careful edit to add a keyword can be used to clarify the difference. After a period of merging, review the model, use the cluster command to look at the emerging structure of the combined model. Map the clusters, look at their content and you may find more concepts that can be merged. Merging models can be a slow process, but it is an excellent way of getting to know your data in detail and gives a clear picture of the "shades of grey" that exist in the interviewees' understanding of the situation.

Sharing models

An important aspect of sharing models is keeping track of who has made which changes to the model. It is possible to track who has entered new concepts and who last edited concepts. This is where Decision Explorer's user name facility can be helpful. The Control menu, Model options item displays a dialog containing an option marked "Prompt for users name on open". If this box is checked, the User Name Selector dialog will appear automatically each time the model is opened. The name of the last person who edited the model appears highlighted in this dialog for convenience. The current name selection can be changed at any time, and the list of user names can be initially set up, using the Property menu, User name item (or the shortcut Alt+N). Providing that users are rigorous in making sure that it is their name (and not someone else's that is being used) it is now easy to track who has changed what. The commands "Leditor" and "Lcreator" give a listing of who the last person to edit a concept was, and who created it in the first place. These commands can be used on ranges of concept numbers e.g. Leditor 1-10, lists the names of the last people to edit concept numbers 1 to 10, and Leditor 1#10, lists the names of the last people to edit concept numbers 1 and 10. If no range of concepts is specified the results returned will be for all of the concepts in the model.

You may have noticed that when you create and save a Decision Explorer model, a *.mlk file is created, as well as the model file (a *.mdl file) and the model backup file (a *.mdk file). The *.mlk file is a "lock" file, which is created automatically and used when models are "shared". If you want to share models between a project team, then generally the easiest way to do this is by putting the models on a central server, in a shared directory which the team can access. If this is done there would be the potential for having two users trying to edit the same model at the same time - the lock file is a device to prevent this. In single user use the lock file can be ignored but when sharing models it serves a useful purpose. When the second user tries to open the file, they will be told that the model is in use, and shown the current users name. Important note: please test model locking on your system before relying on it. Windows NT server for example requires that "opportunistic file locking" be turned off, a tool for which is available on our web site. If you have any questions about anything featured in this article, please email support@banxia.com.

If you would like more information about any of the events listed below please contact either ourselves (Banxia Software Ltd) or the appropriate event organiser, whose contact details are given in the "Contacts" box below. If you are not sure who is the right contact then please just call/ contact us, we will be able to help you!

Friday, 19th February Birmingham	"Map your way to a better understanding with Decision Explorer". A one day training workshop, hosted by the Operational Research Society . Tutored by Kenny Forsyth , a consultant within the Strategy Group of PricewaterhouseCoopers . Aimed particularly at practitioners and management researchers (consultants, managers and strategists interested in structuring and drawing conclusions from this "soft" information. The key principles underlying the day will be focus, communication and productivity and how these can be enhanced in a meeting/ workshop setting.
Wednesday, 24th February London	Strategies in Qualitative Research : QSR NUD*IST software and methodological issues Hosted by the Institute of Education , London, this one day conference will include a "Thinking linking" section, where links between NUD*IST and other software packages (including Decision Explorer) will be presented and discussed. For information please contact Colin Crowley (see Contacts below)
Wednesday, 3rd March London	"An introduction to Decision Explorer" A one day training workshop, tutored by Dr. Silvana di Gregorio of SdG Associates . This workshop will give a thorough overview of Decision Explorer, outlining the basis of cognitive mapping, with hands-on sessions on concept entry, linking and display styles and how to build, explore and analyse models.
Friday, 19th March Boston, MA USA	"An introduction to Decision Explorer" A one day training workshop, tutored by Dr. Silvana di Gregorio of SdG Associates . This workshop will give a thorough overview of Decision Explorer, outlining the basis of cognitive mapping, with hands-on sessions on concept entry, linking and display styles and how to build, explore and analyse models.
Friday, 26th March London	Academic Users Group meeting , which will be hosted by the Bartlett School of Graduate Studies , University College, London. An opportunity to present your work and to discuss it with other researchers who use Decision Explorer and mapping in their work.
Friday 7th May London	"Come & See" Day. To be held at Scolari Sage Publications Ltd , Bonhill Street, London. An event for an invited audience of management consultants. Three short sessions, which will be repeated throughout the day, when practitioners are invited to come and talk about and try out Decision Explorer.
Tuesday, 8th June London	"An Introduction to Decision Explorer" A one day training workshop, tutored by Dr. Silvana di Gregorio of SdG Associates . This workshop will give a thorough overview of Decision Explorer, outlining the basis of cognitive mapping, with hands-on sessions on concept entry, linking and display styles and how to build, explore and analyse models.
Friday 2nd July London	This is a provisional date for a one-day workshop tutored by Dr. Fran Ackermann , co-author of Making Strategy: the journey of strategic management . This event should be of interest to experienced users of Decision Explorer who would like to learn more about the Journey-making methodology and using Decision Explorer as part of the Journey-making process.

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Hints and tips

Did you know? ...

... You can keep a text note to yourself in the Model Overview dialog to remind you of model status. Use the Help Menu, Model Overview item.

Feedback

We would very much welcome comments from readers of the Decision Explorer Newsletter and suggestions about the articles that you would like to see in the Newsletter. If you have a suggestion or would like to contribute an article then please contact Jenny Brightman, at Banxia Software, either by telephone on (UK +44) 0 141 552 3082 or by email to News@banxia.co.uk. Thank you.