STRATEGIC OPTIONS DEVELOPMENT AND ANALYSIS (SODA)

The SODA (strategic options development and analysis) method has been developed by Colin Eden and his associates (e.g. Eden and Simpson, 1989). It is essentially a way for people to externalise their different understandings of a situation, and as far as possible to develop an explicit practical understanding that they can share. Details of this method are normally customised for any particular project, but the classic form works like this:

1. **Planning meetings** These set the project up, get a preliminary feel for the situation, identify the people to work with, and manage people’s expectations about what will happen.

2. **Client interviews** Interviews are set up with each of the key people involved to talk for an hour or so in a free-wheeling way around the problem area.

3. **Development of causal maps** The interviewer develops a *Causal map* (q.v.) depicting the interviewee’s perception of the situation.

4. **Check-back interviews** These check with the interviewees whether their causal maps have captured the interviewee’s views correctly. If not, they are adjusted as required.

5. **Merging the maps** With the help of special software (‘Decision Explorer’) the maps from all the interviews are merged to create a composite map. Though software-aided, this still involves many skilled judgements (e.g. about whether apparently comparable features in different maps should be merged, or about how to cluster apparently related nodes).

6. **Presentation** The separate and merged maps are presented to the participants, and the merged map is worked on until everyone finds it acceptable. The changes are made on-screen, either using a skilled technician (in the earlier versions) or via personal terminals (in the later groupware versions). As well as allowing the group to develop and adjust the map in a communal way, this allows the group to understand one another’s viewpoints, check the consultant’s work, feel in control of the collective map, and develop a high degree of ownership of it and commitment to its results.

7. **Interpreting the map in terms of goals, strategies and tactics** The map nodes can usually be interpreted as:
   - **High level goals** These are the overall causal outcomes you are trying to achieve. In terms of the map, they usually appear as ‘heads’, i.e. causal arrow-heads that emerge
from the map but don’t go any further. No one feels any need to explore their further consequences, because they are what the organisation is set up to achieve.

- **Medium level strategies**  These are the factors that feed in more or less directly to the goals – the high level processes that generate the goal states.

- **Low level tactics and operational targets**  These are the activities that feed more or less directly into the medium level strategies. They are often located at 'tails' – causal arrows that converge on them tend to come in from the wider environment, so that no one feels any need to trace them any further back into the environment.

8. **Action selection, allocation and implementation**  Once a coherent map has been agreed, complete with its goals, strategies and operational tactics, particular tactical options are selected and allocated to particular people for implementation, within the shared, and now well understood, context created by the rest of the map.

In other words, SODA develops a negotiated, action-oriented, understanding that is usually rich enough so that it is obvious what has to be done and no further problem solving is needed. If, however, the map does throw up a requirement for a tactic that still needs further problem solving, then that of course is possible.