

Back From the Future: beyond the limitations of the Past

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Almost everyone seems to agree that goals are a *good thing*. Setting a goal to achieve something outside of the routine is a way to avoid drifting and take a measure of control of the progress of a business, career, or life in general. And even if change is not desired, it is often demanded by changing environment - it's usually better to select a new course than try and buttress up yesterday's position. But setting a goal is not the same as getting the results.

Big goals introduce a dilemma

You're supposed to set big goals, but a couple of things get in the way in practice, because the idea of a big goal introduces both motivation and resistance.

Big goals are both motivating and frightening. Motivating because they can promise a real change (for the better, one hopes), and frightening for the same reason. The response to the dilemma is often Walter Mitty-like - indulging in the fantasy without really intention to follow through, or tentative and super-reasonable ("Don't run before you can walk", "Let's just dip our toes in the water for now"). Either way there is little commitment to doing anything bold and really making a difference.

Walter Mitty

It's not unusual for businesses and individuals to set out grandiose initiatives and visions for the future, and then conveniently forget about them a few weeks or months later. We often hear members of organisations tell us that a new fad, initiative or certification process has been brought in from above, is getting in everyone's way, but that there is no cause for concern because "the boss will have forgotten about it in a few months time and will be on to the next thing".

Personal development gurus make a good long-term income exploiting a similar dynamic. They teach programmes with names such as *Living Your Dream*, and *Designing Your Destiny*, in which participants formulate dramatic plans never to see the light of day. The guru knows that in practice, a seminar junkie's idea of "going for it" is just to book on the advanced programme.

In both of the above cases, there's a brief 'rush' and the sense of taking control, but any anxiety is managed by never quite following through.

Playing it so safe it's not motivating

The other way to set goals without (perceived) risk, is to set 'modest', 'achievable' or 'sensible' ones¹. It can seem much safer to set goals which are straight-line extrapolations of what we've already done. But the resulting goals are boring, uninspiring and often don't seem worth the effort. They tend to bring with them our existing sense of limitations.

¹ I say perceived risk, because the actual risk of this tactic may be very high – survival may depend on making a fundamental shift rather than rearranging the furniture.

Where does the anxiety come from?

Any really worthwhile goal is going to challenge peoples' ideas about what is possible. Where do these ideas come from? Typically from their own past experiences, or past experiences they have heard about from sources they trust. If a new proposal doesn't fit with what they therefore 'know' about how the world works, most people respond with resistance in one form or another.

There are lots of names for this kind of process, include limiting beliefs or assumptions, dominant logics, comfort zones, even (if you like an academic turn of phrase) sedimented theories-in-use or (if you prefer a psychological-sounding explanation) low self-efficacy.

Just as there are many names for the problem, there are many ways to escape from such limitations and so achieve dramatic shifts in results. Here's a general principle (and at the end of this article is an explicit process) for stepping outside of limiting worldviews that allows you to get the most out of goal-setting exercises, as an individual, team or business.

What Direction Does the World Work In?

It's possible to think about "what makes things happen" from two different directions. Let's say you ask two people why John kicked the ball. You might get two different kinds of stories by way of explanation:

A says "John kicked the ball it because he received it"

B says: "John kicked the ball in order to score a goal"

It's the difference between "because" (Past-to-Present) and "in order to" (Future-to-Present). Table 1 compares the two kind of thinking.

Past-to-Present thinking	Future-to-Present thinking
reactive the thinking of tradition explains the world as working like a billiard table potentially the thinking of stagnation and inertia	proactive a way out of inertia about taking action in order to create a desired future potentially the thinking of creativity and achievement

Table 1. Past-to-Present thinking compared to Future-to-Present thinking

As the "remembered past" is the source of the reasons why something won't work, it needs to be circumvented somehow. Therefore Future-to-Present thinking is implicitly or explicitly recommended by intelligent writer on personal, organisational and strategic development. In

particular, it's the very approach that goal setting is designed to encourage. But there's a potential pitfall: *it's easy for the future to just be a remake of the past*².

Problems when the Future is an extrapolation of the past

1) Individual Careers

In the careers of individuals, basing the future on the past can have a soul-destroying effect. At the time I was leaving University life to start a business, I spoke to a senior lecturer in his early 50s who I knew to be frustrated with his relatively low grade, income and prospects for his age. On hearing that I was leaving, he asked me: "which University are you going to?" When I told him I was going to start a business, he was shocked. "Do you really think you can get as much money elsewhere?" he asked.

I was startled by the limits of his worldview – never mind by how an intelligent man could be so unaware of what people earn in different sectors. His 'plan' was to keep on doing what he'd always done, assuming that the salary scale he was on was the only yardstick of potential income in existence, and apparently assuming that everything else he had 'learned' was true for him would continue to constrain him in the future. He would maybe make the next grade before they offered him redundancy.

His example is not unusual, and probably not that extreme. The education sector, public sector and many corporations are full of people who are living with self-limiting futures which are unimaginative and limiting extrapolations of the past.

2) In strategy formulation

In a different arena, that of corporate strategy, Tregoe and Zimmerman³, Alan Weiss⁴ and others discuss the dangers the same sort of thinking. They warn of the danger of merging strategic thinking and planning, in particular because long-term planning is often a mechanical extrapolation of past performance.

When you allow the past to determine your direction, your goals are likely to be in terms of more, or better or bigger amounts of what you have already got. They tend to be about playing the game you are in better, rather than getting into a better game. Here are some of the main problems with planning based on extrapolation:

² I would like to acknowledge the contribution of the late Harold Milnthorpe to my thinking on this topic.

³ *Top Management Strategy*, Simon & Schuster, 1980.

⁴ *Process Consultation*. Jossey-Bass. 2002

- The level at which longer-term goals are set is determined by current and past limitations (for example identified by the old SWOT analysis technique). This is one of the problems with the popular SMART goals, too. The R stands for realistic. Realistic according to what standards? The answer is always going to be in according to the standards of past experience.
- Tregoe and Zimmerman point out that long-range plans are actually a lot more short range than people admit. For example, in most five year plans, it's only the first year that tends to be elaborated in any detail.
- Plans based on extrapolations from the past tend to keep you going in the same general direction. They don't address the issue of whether that's where you want to go.
- Plans based on extrapolation tend to assume that external conditions will remain more or less the same - clearly a dangerous basis on which to proceed.

For these reasons, these authors argue that strategy and planning should be separated, and to beware of the dangers of allowing strategy to evolve as an extrapolation from the past.

Strategise First, *then* Plan (Backwards)

In creativity sessions, it's important to encourage the suspension of criticism early in the process, so as to get plenty of good (hopefully novel, ingenious) ideas, even if that means getting a share of crazy, unworkable ones too. Only later on is it appropriate to apply filters about practicality.

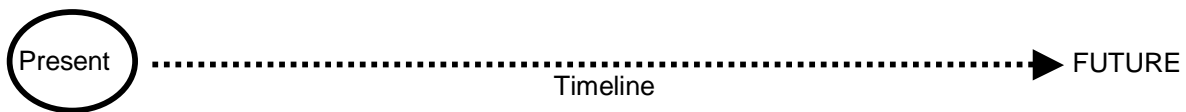
While there are big differences between planning business strategy and individual career strategy, our recommendation in both cases is that the key strategic question (What business do we want to be in? What career do I want to be in?) should be answered prior to planning considerations.

Our further recommendation is to *plan backwards*. By reversing from the desired future into the present, it's possible to avoid falling foul of past, learned limitations. It has to be said that starting with the future requires some considerable mental agility in practice. Tregoe and Zimmerman express the view that, despite many writings recommending it, many managers don't simply because they just don't have the tools.

Below is a process which we've used successfully with individuals and teams. It allows you to suspend assumptions about what's possible long enough to develop actionable plans for achieving big goals. It uses the idea of a time-line – either physically laid out on the floor, or on a table top, flip-chart or white-board as appropriate.

A process for Future-to-Present goal setting

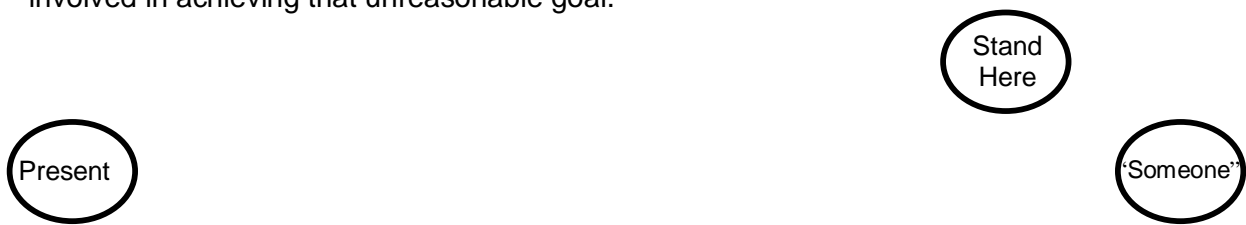
Identify and stand on a timeline, starting from the present and looking out into the future.



Pick a *really big*, worthwhile, motivating goal, without, at this stage, being concerned about how realistic it is.



Step off the timeline and identify a position in the future where “someone” is successfully involved in achieving that unreasonable goal.



Identify the step *just before* “that someone” achieved the goal. Ask the key question:

“What has to *already* be there (or be true) in order for “that someone” to achieve the goal as a natural next step?”.

Step into that position and check that *if* you were there, you could take the next step and realise the goal.



The position you’ve identified now becomes the new (stepping stone) goal.



Is the stepping stone an unreasonable goal for *you*?

If it is, use the same process again. Make the stepping stone the goal for “someone” (as in Step 3) and identify the step before it (using the key questions from Step 4). Keep going until you reach a ‘reasonable’ stepping stone.

If the stepping stone is reasonable – you’re ready to get started.



Key Points

- Goals that bring dramatic results should be set WITHOUT due regard to the past, at least to start with.
 - Strategic questions (WHAT?) are best kept separate from, and addressed prior to, planning questions (HOW?).
 - Planning how to achieve goals is best done backwards, and that is made much easier by having a systematic process such as the one outlined.
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If you would like to find out more

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