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# Portfolio Sensemaking Workshop

[Team/Office Name]

[Dates]

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ASIA AND THE PACIFIC  
Regional  
Innovation Centre



# Setting the scene

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[opening by leadership]

- ó Why the team is doing the portfolio sensemaking exercise at this moment
- ó How might sensemaking contribute to the team's work

# Reviewing the Statement of Intent

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# Statement of Intent

**Insert Statement of Intent**

# Group discussion:

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How does this initial statement of intent resonate with you?  
What reflections do you want to share?

# Session agreements

- Starting on time (especially after breaks)
- Turning on cameras (bandwidth permitting)
- Gallery view in zoom (let's see each other)
- Being present and listening actively
- Being respectful and sharing space/time across 'the room'

# Sensemaking introduction

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How can we accelerate the effects of our team's project portfolio?



# 3 questions

- Why this particular set of projects at this point in time?
- Are these projects relevant and coherent to the (current and emergent) needs of the industry/country, and government(s)?
- How can we do more with what we already have invested on the ground?

# Objectives

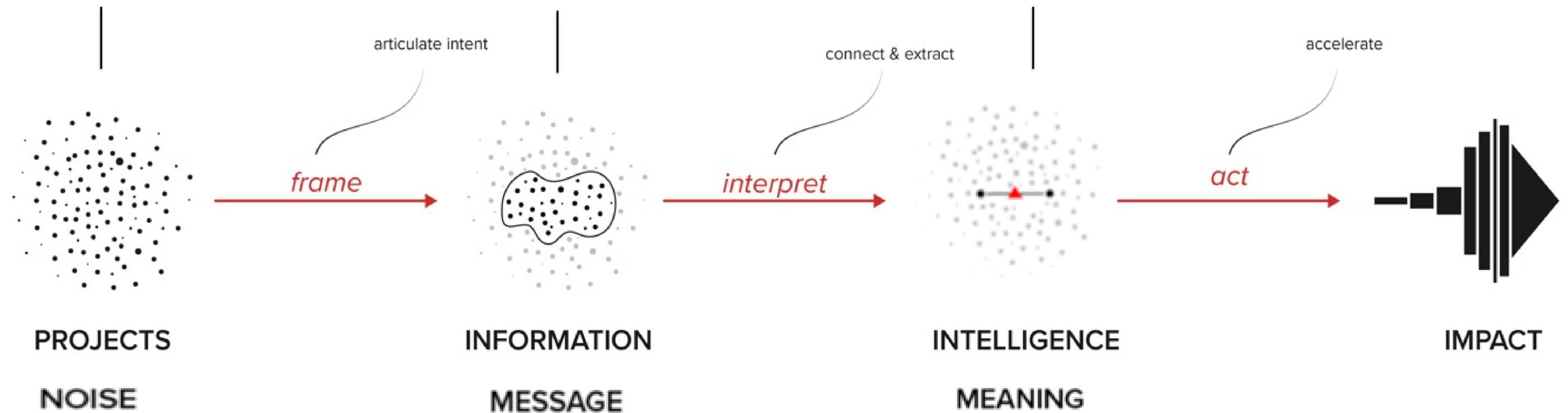
- 1. Observe and make sense** of an existing portfolio of work
- 2. Generate** insights and **extract** intelligence from that portfolio
- 3. Identify** areas for potential action that could accelerate the development effects and impacts of the portfolio

# How will we be doing this?

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Unpacking the multi-day session

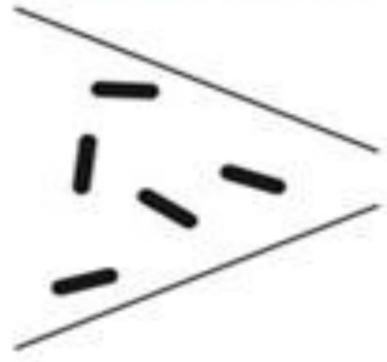
# By the end of our sessions...



STATE

INTERACTION

EFFECT



## FUNNELING

versus

## LAYERING

STATE

INTERACTION

EFFECT



by selection

### ELIMINATION

Efficient

Short-term

Hard to scale-up

Reduces network effects

Transactional & de-meaning

by concentration

### ASSIMILATION

Effective

Sustainable over time

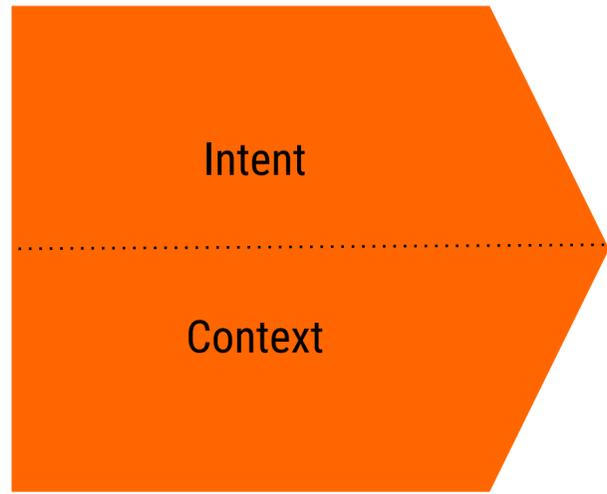
Grows organically

Enhances systemic effects

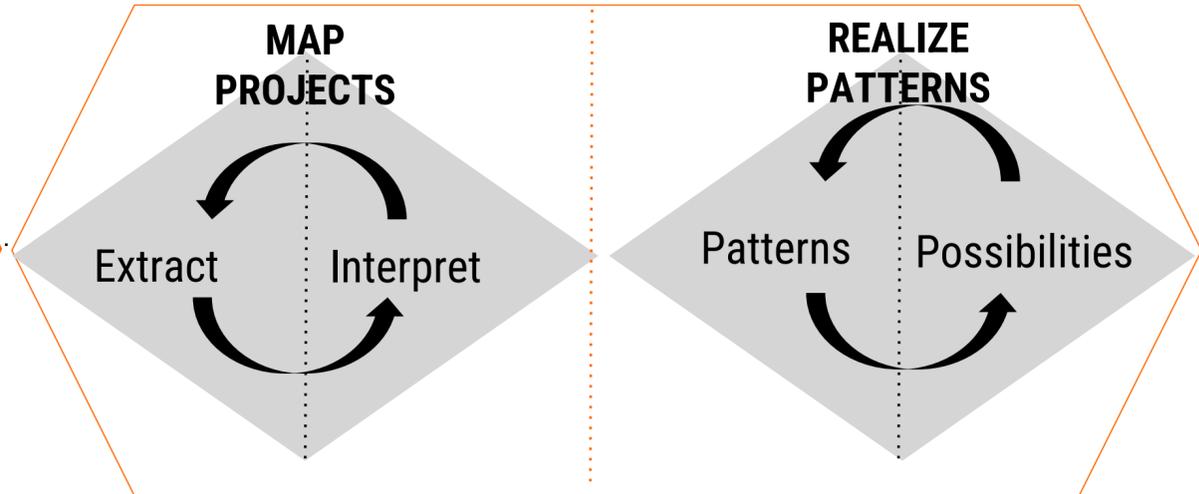
Coherent with intent

# Agenda

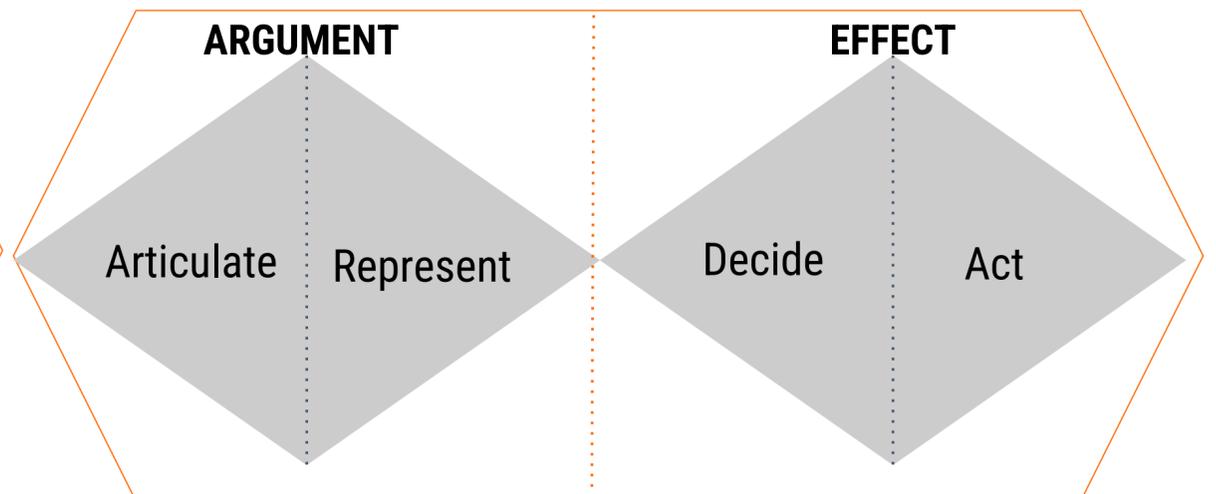
# Identity



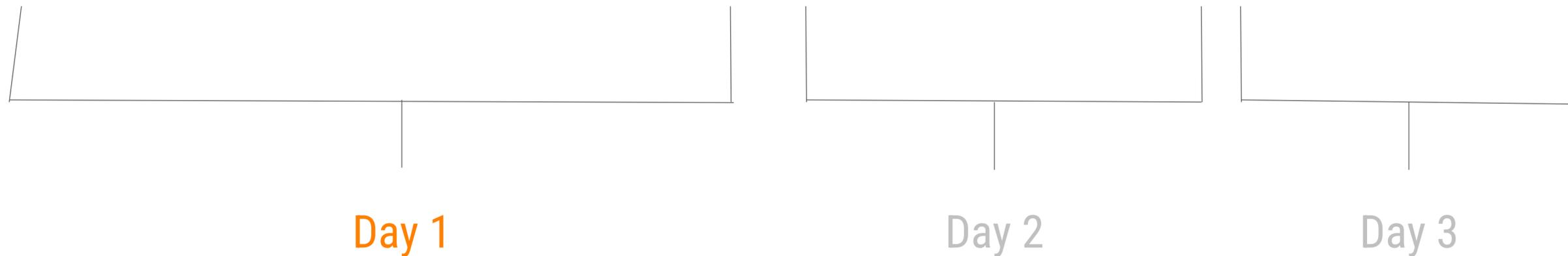
# Sensemaking



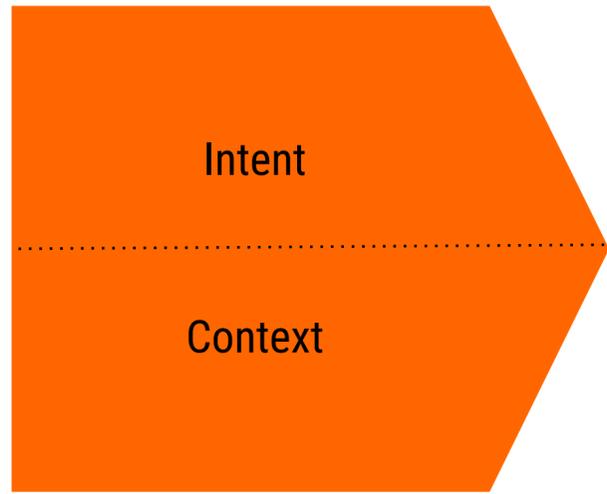
# Intelligence



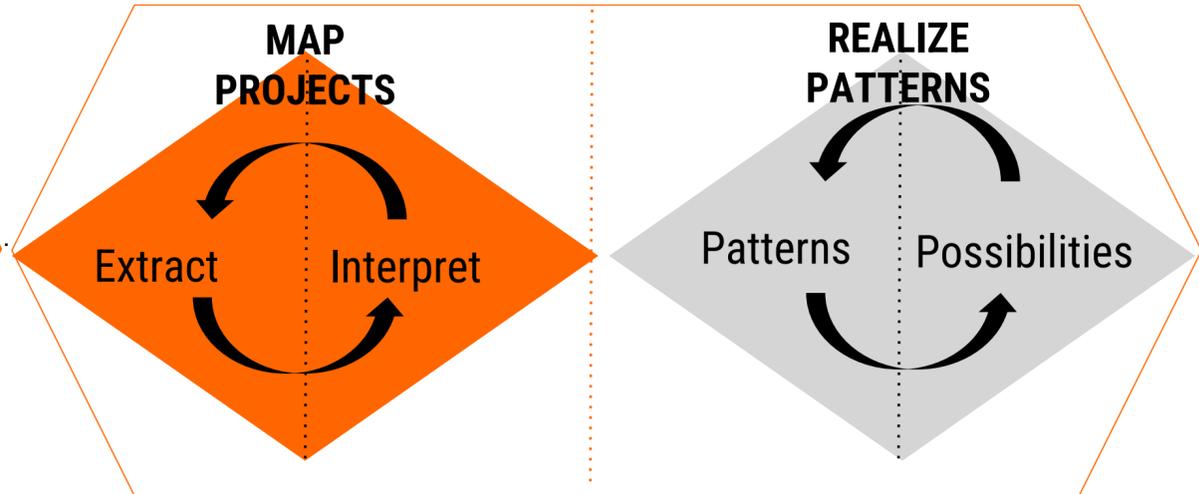
What role does the team want to play, and what does it want to achieve in the industry/country context?



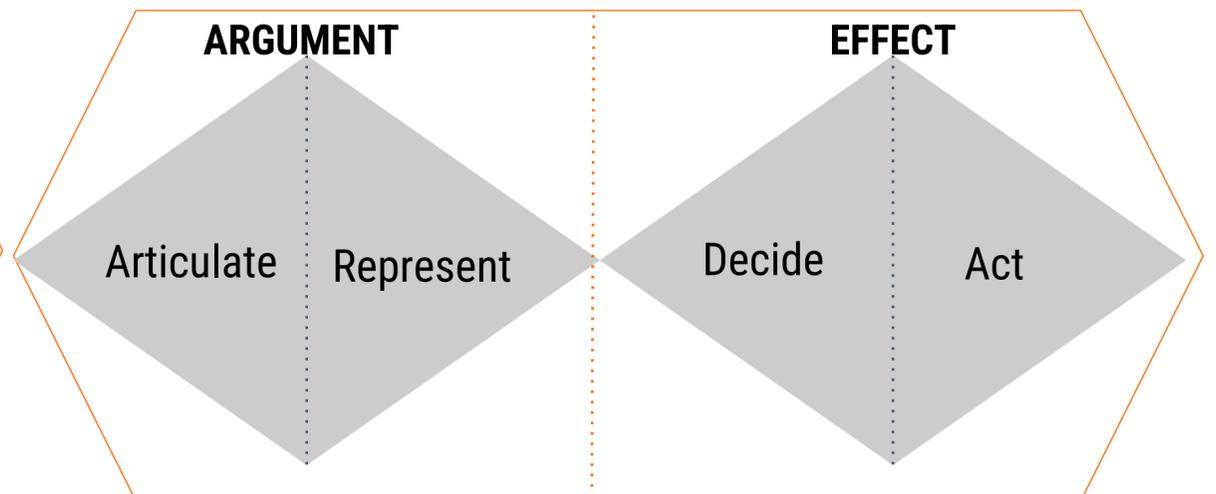
# Identity



# Sensemaking



# Intelligence



What role does the team want to play, and what does it want to achieve in the country context?

What have we done so far?  
What have we gained?



Day 1

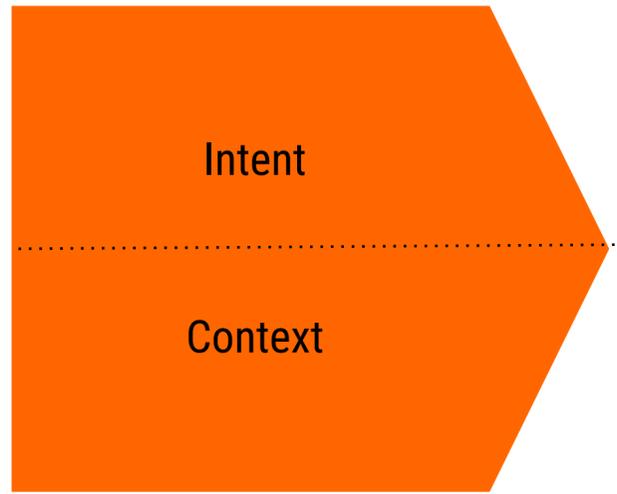


Day 2

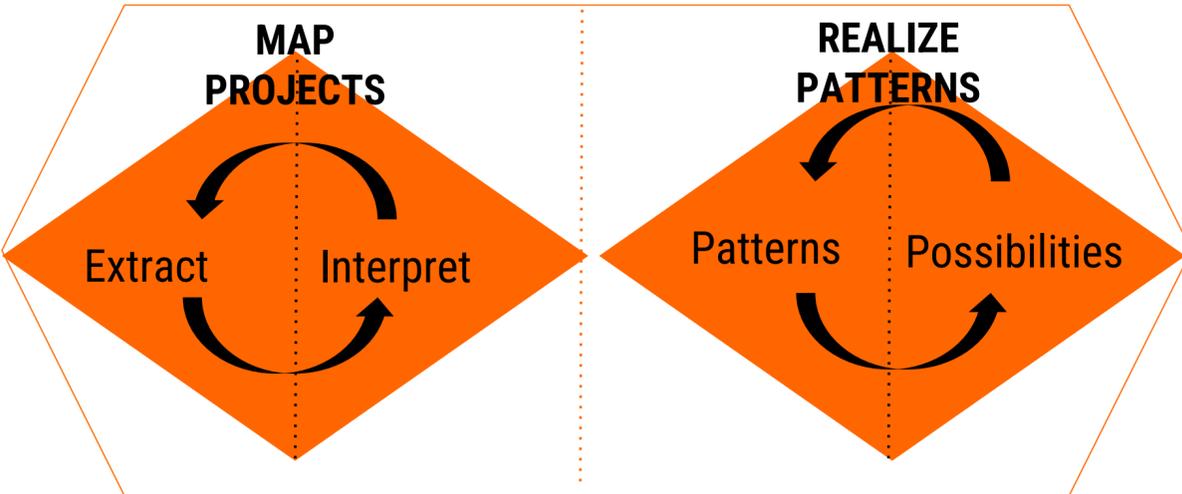


Day 3

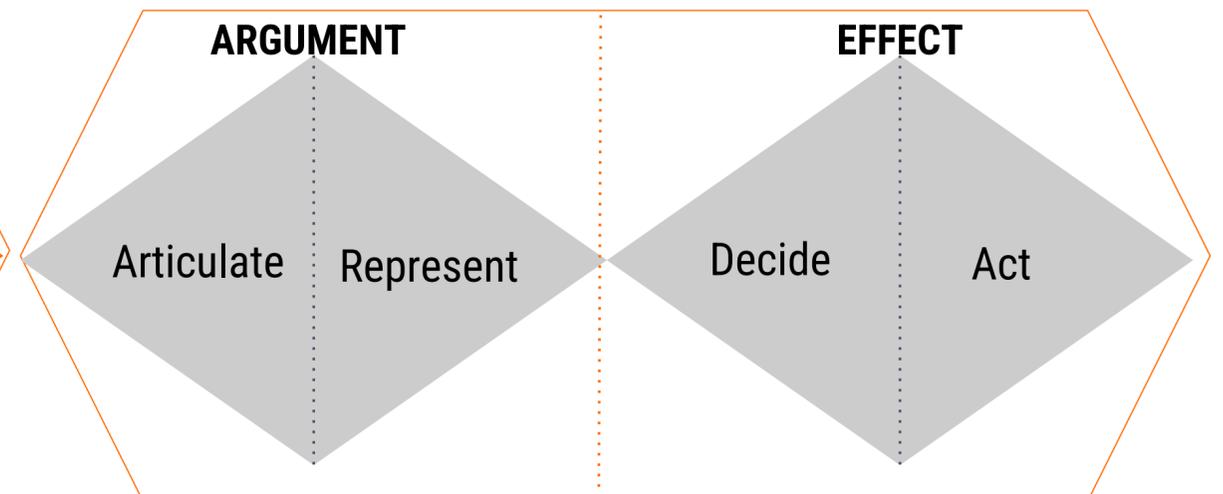
# Identity



# Sensemaking



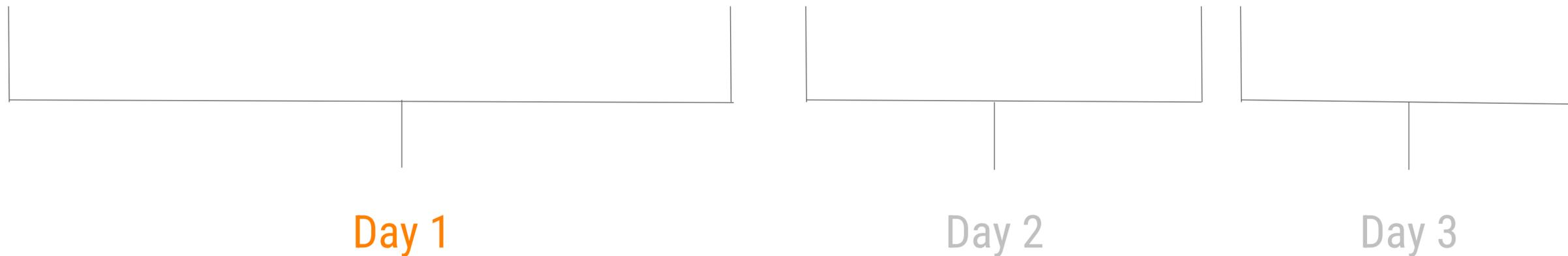
# Intelligence



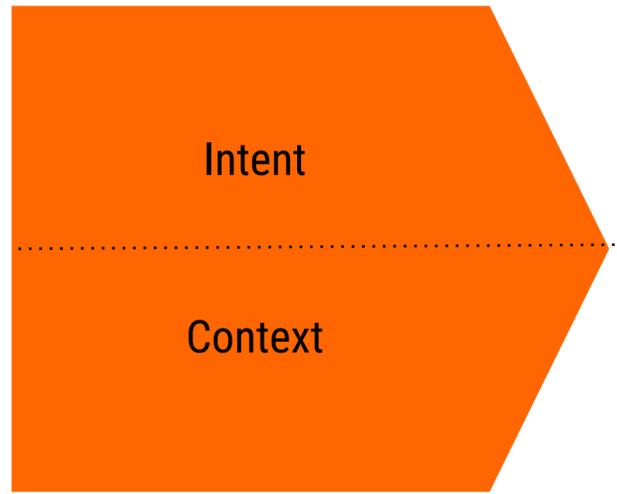
What role does the team want to play, and what does it want to achieve in the country context?

What have we done so far?  
What have we gained?

What interconnections do we see?  
Where are the gaps?  
What are we not hearing?

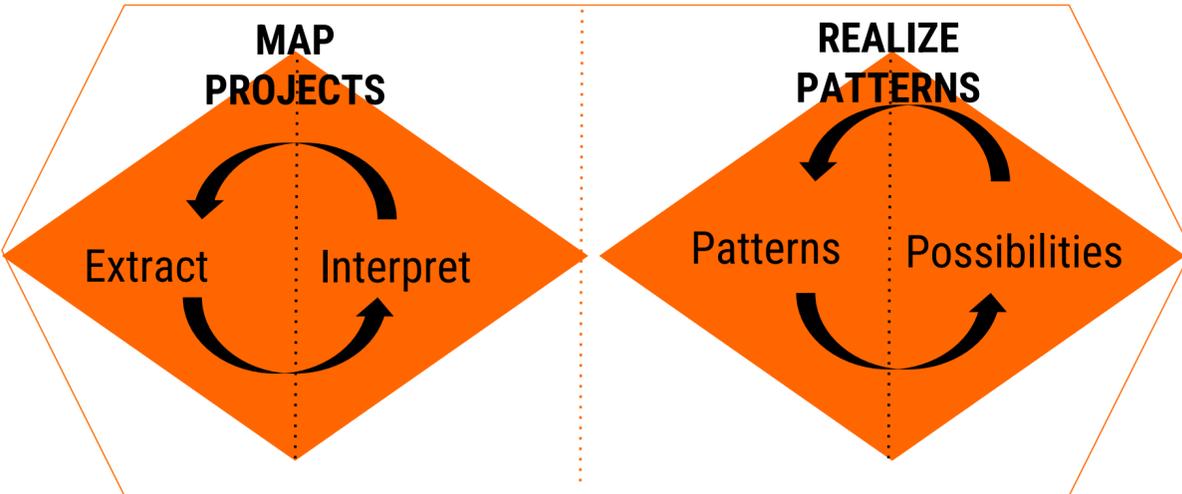


# Identity



What role does the team want to play, and what does it want to achieve in the country context?

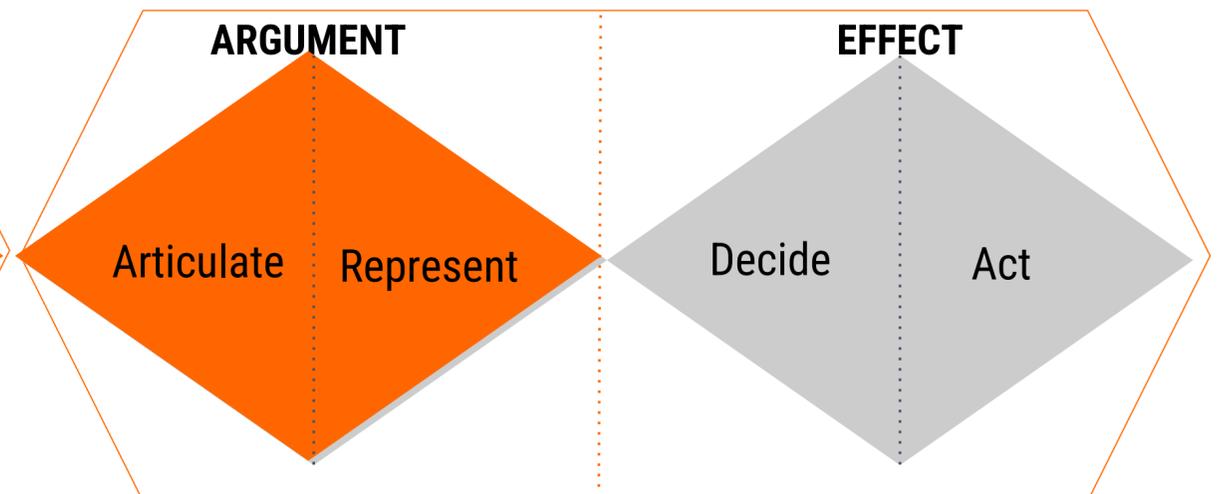
# Sensemaking



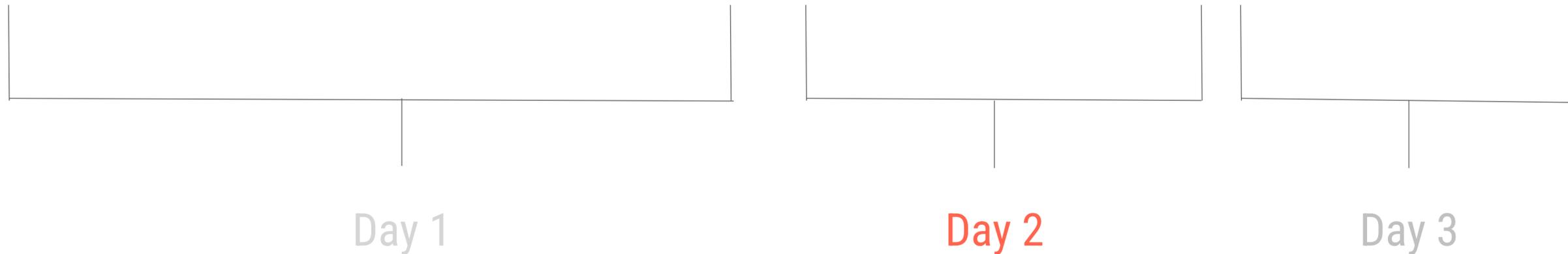
What have we done so far?  
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What interconnections do we see? Where are the gaps? What are we not hearing?

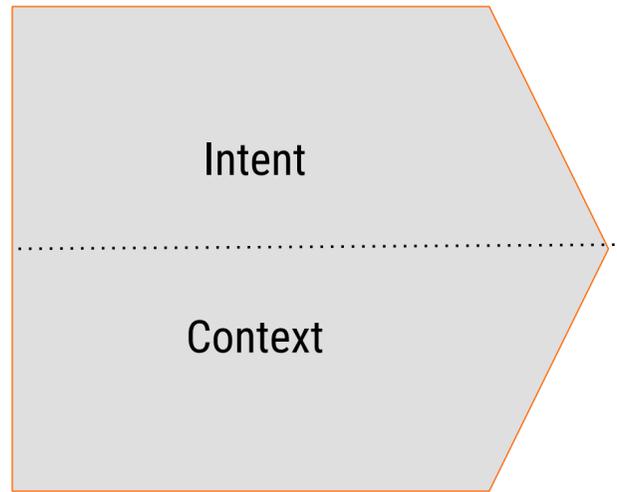
# Intelligence



Start articulating insights on patterns

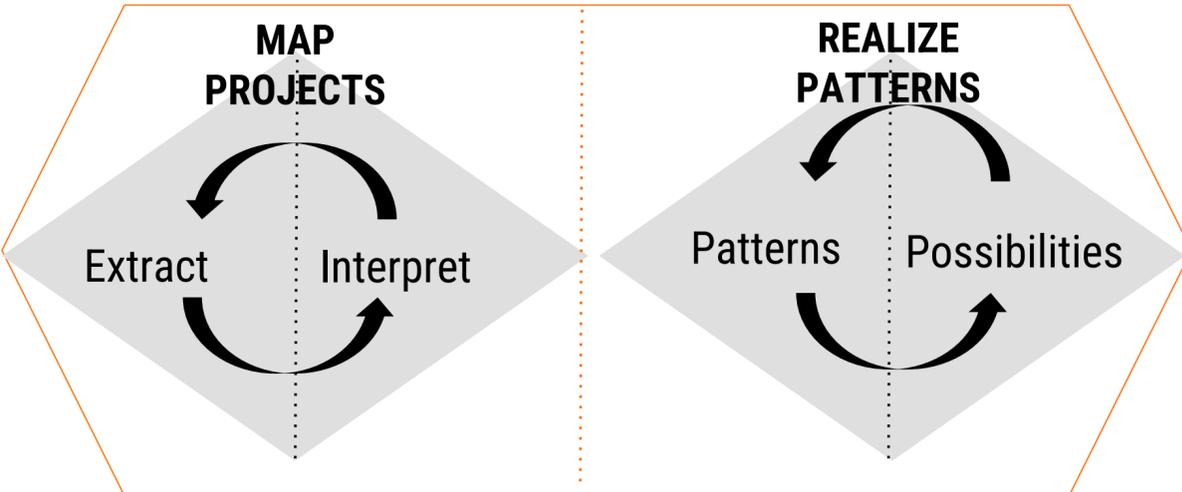


# Identity



What role does the team want to play in industry/country, and what does it want to achieve in this industry/country's context?

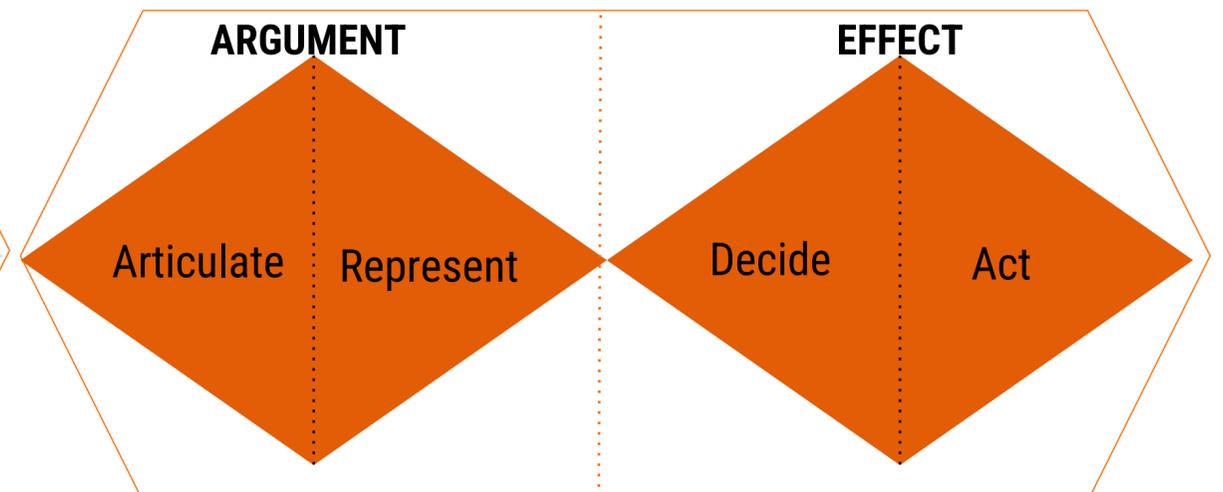
# Sensemaking



What have we done so far?  
What have we gained?

Start naming the patterns, and where we see them (the interconnections, gaps).

# Intelligence



What needs to change? What reasons do we have for change?

What decisions do we need to make?  
What actions would we need to take to?

Day 1

Day 2

Day 3

# Making sense of our portfolio

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## Group Agreements

- This is a **collective experience** – be part of it, be present, reduce distractions
- Practice **Active listening** - listening to learn – not to evaluate or correct
- Practice **Reflective questioning**- building deeper shared understanding of our work
- Practice **Systems Thinking** - observe **relationships and dynamics** between different projects
- Share the Q&A time with everyone
- Keep to time

## Setting expectations

This is a **social experience** – a bit like theatre, where everyone has fixed roles:

- Some are **sharing information with purpose** (our project presenters)
- Some are **listening for specific themes** (our window mappers)
- Some are listening to **ask questions** (our listeners, our other participants)

# The project template frame:



**1-2 minutes**

## Start with WHY

Why are we doing this project?  
What problem is this project trying to solve?  
Why do we think this is a problem?



**2 minutes**

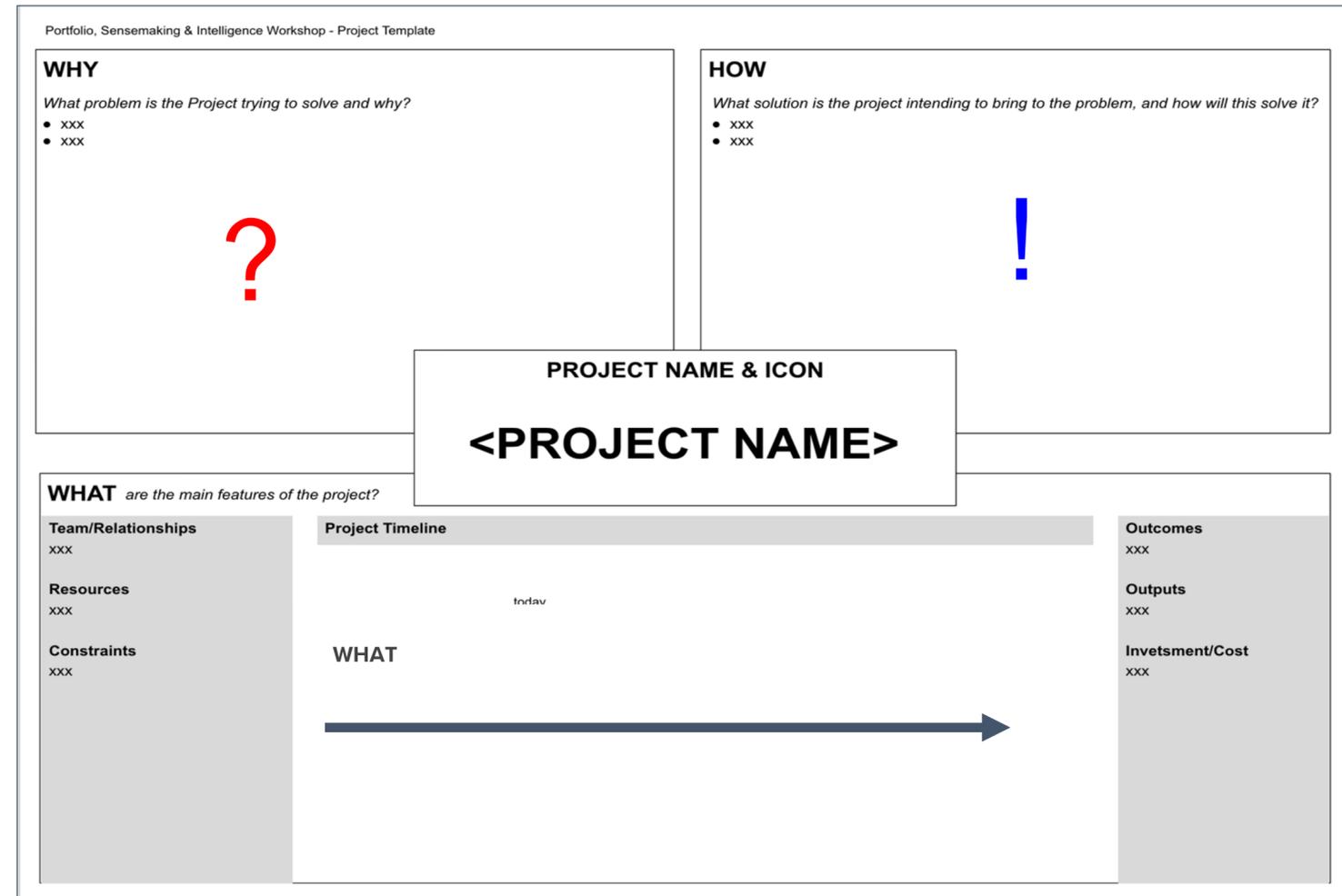
## Follow with HOW

What 'solution' is the project intending to bring to the problem?  
What other 'solutions' were considered?  
How is this work designed?

**2 minutes**

## Finish with WHAT

What will the project do to produce this outcome/effect?  
What are the main features of the project?



# Workshop Activity: Sensemaking

#x projects, #x insight windows

#x projects per round

5 minutes to present project

**5 minutes for collective Q&A per project**

[repeat x #X projects ] = #X minutes

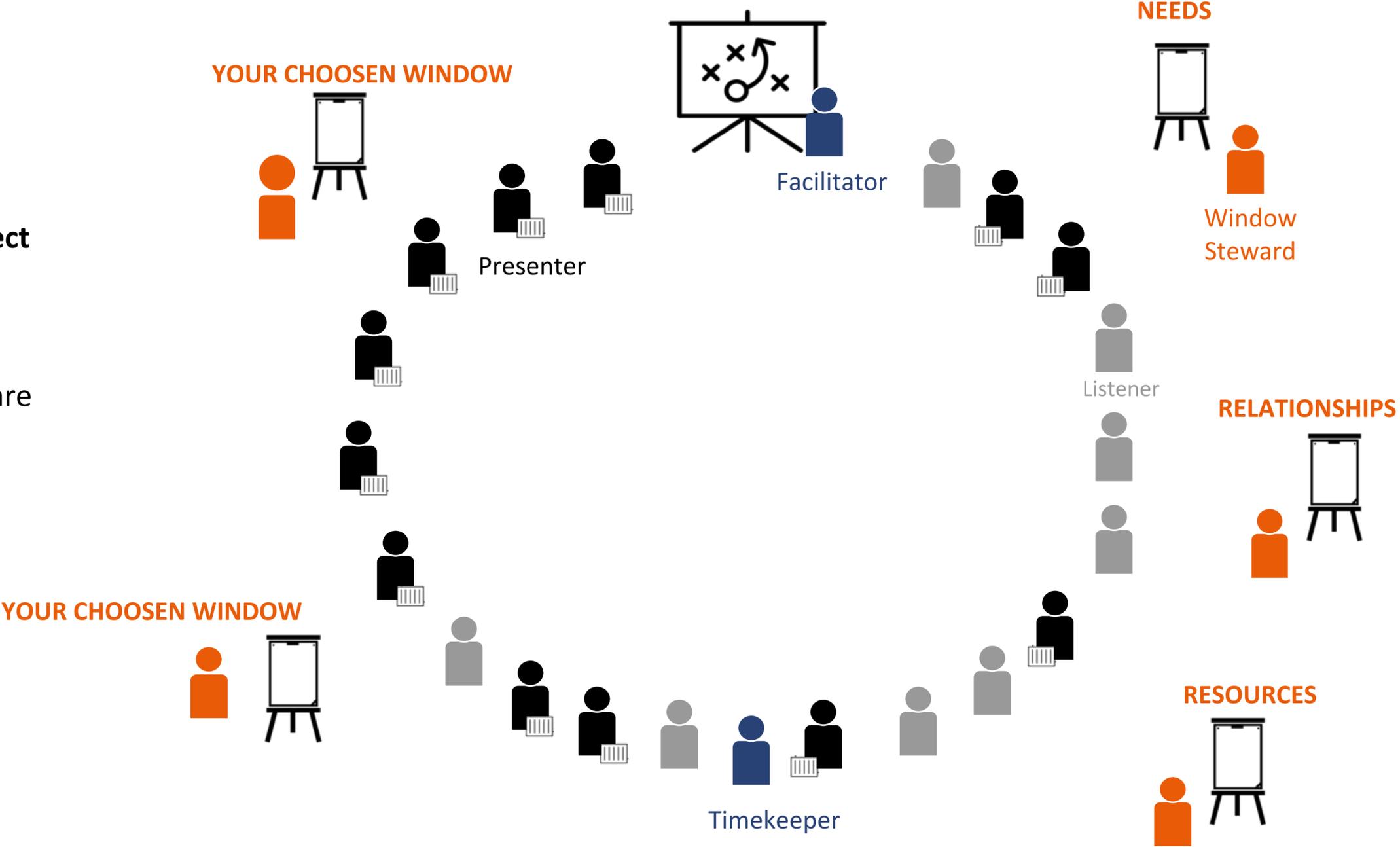
5 minutes for Window stewards' to share

**1-2 top insights**

10 minutes group discussion

Approx. #X minutes per Round

#X number of rounds



# Reviewing the Windows we are listening to

## Needs:

What/whose needs is this project addressing?

Are the needs we are addressing short term and acute, or long term and structural?

## Resources + Capabilities:

Which Resources and Capabilities do the projects use?

What Resources and Capabilities do they need to have greater impact?

## Relationships:

Which relationships, partnerships & connections does the portfolio currently have?

Which ones does it need to create?

X : Descriptions

X : Descriptions

# Listening to our work



**1-2 minutes**

## Start with WHY

Why are we doing this project?  
What problem is this project trying to solve? Why do we think this is a problem?



**2 minutes**

## Follow with HOW

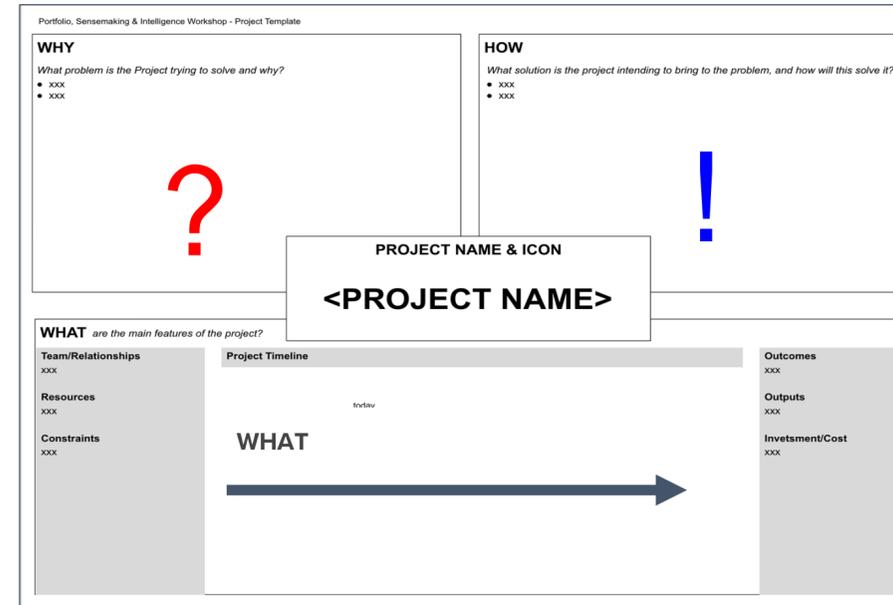
What 'solution' is the project intending to bring to the problem? What other 'solutions' were considered? How is this work designed?



**2 minutes**

## Finish with WHAT

What will the project do to produce this outcome/effect? What are the main features of the project?



## Round 1

**-List of Projects  
(recommend 3-4  
projects per round)**

## Round 2

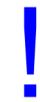
**-List of Projects  
(recommend 3-4  
projects per round)**

# Project Presentation Structure



## 2 minutes on Why

What issue is it trying to solve?  
Why do we think this is an issue?  
Why is the organization doing this project?



## 2 minutes on How

What solution is the project intending to bring to the issue?  
Why this solution?  
What is the desired outcome?  
How has this project been designed?

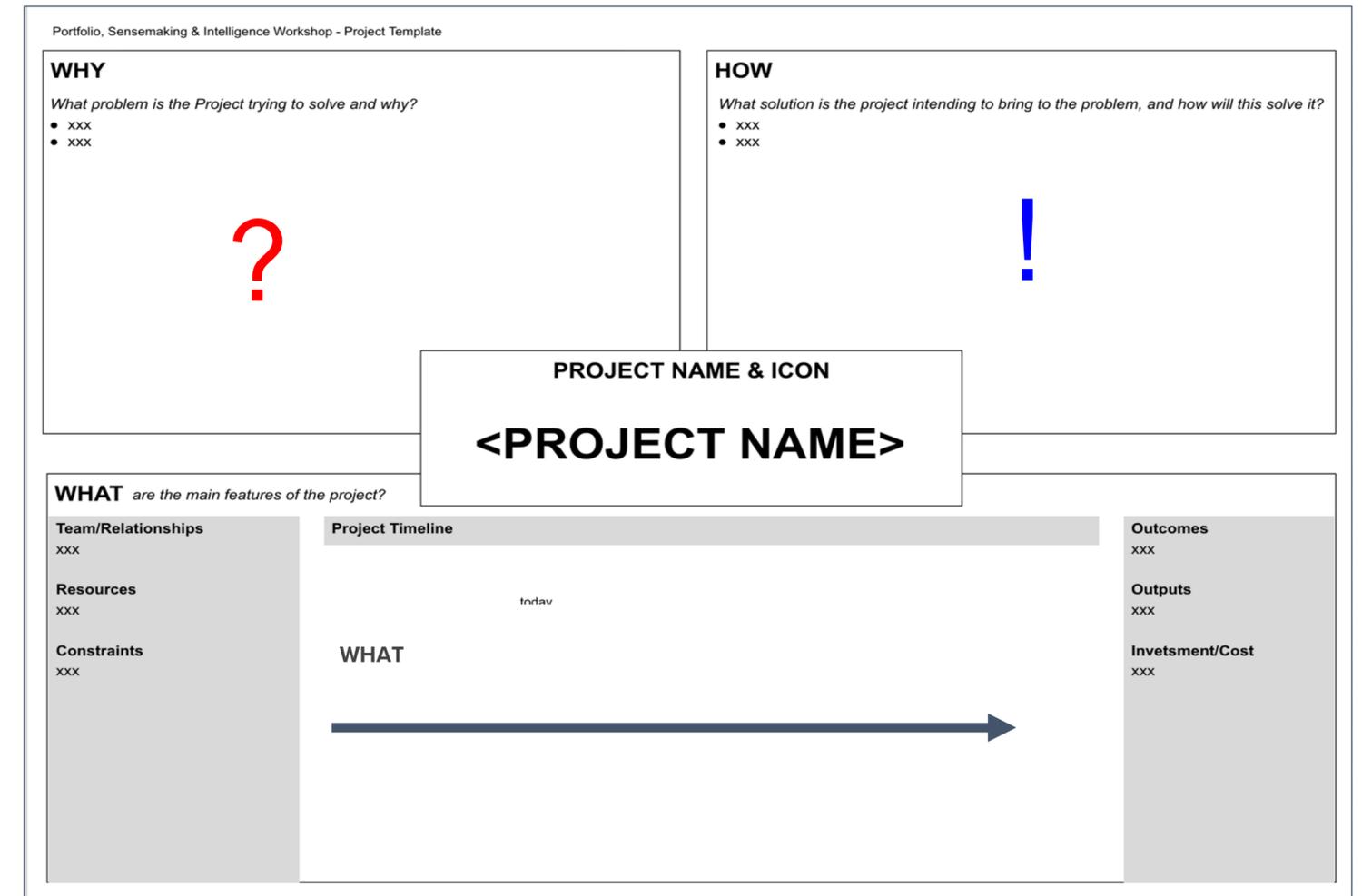


## 2 minutes on What + Lessons learned

What are the features of the project?  
How will it bring about the desired outcome?  
What have we learned?

### Round 1

- List of Projects  
(recommend 3-4 projects per round)



### Round 2

- List of Projects  
(recommend 3-4 projects per round)

# Q&A

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- **What do you still want to know about the project?**

# Window mappers (1 min each)

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- TOP 1-2 insights only

# Group discussion (10 mins)

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- **Something you still want to learn more about?**
- **Did you hear something else across the projects?**
- **Did you notice something that did not come up?**
- **Did something surprise you?**

**Next phase of work:**

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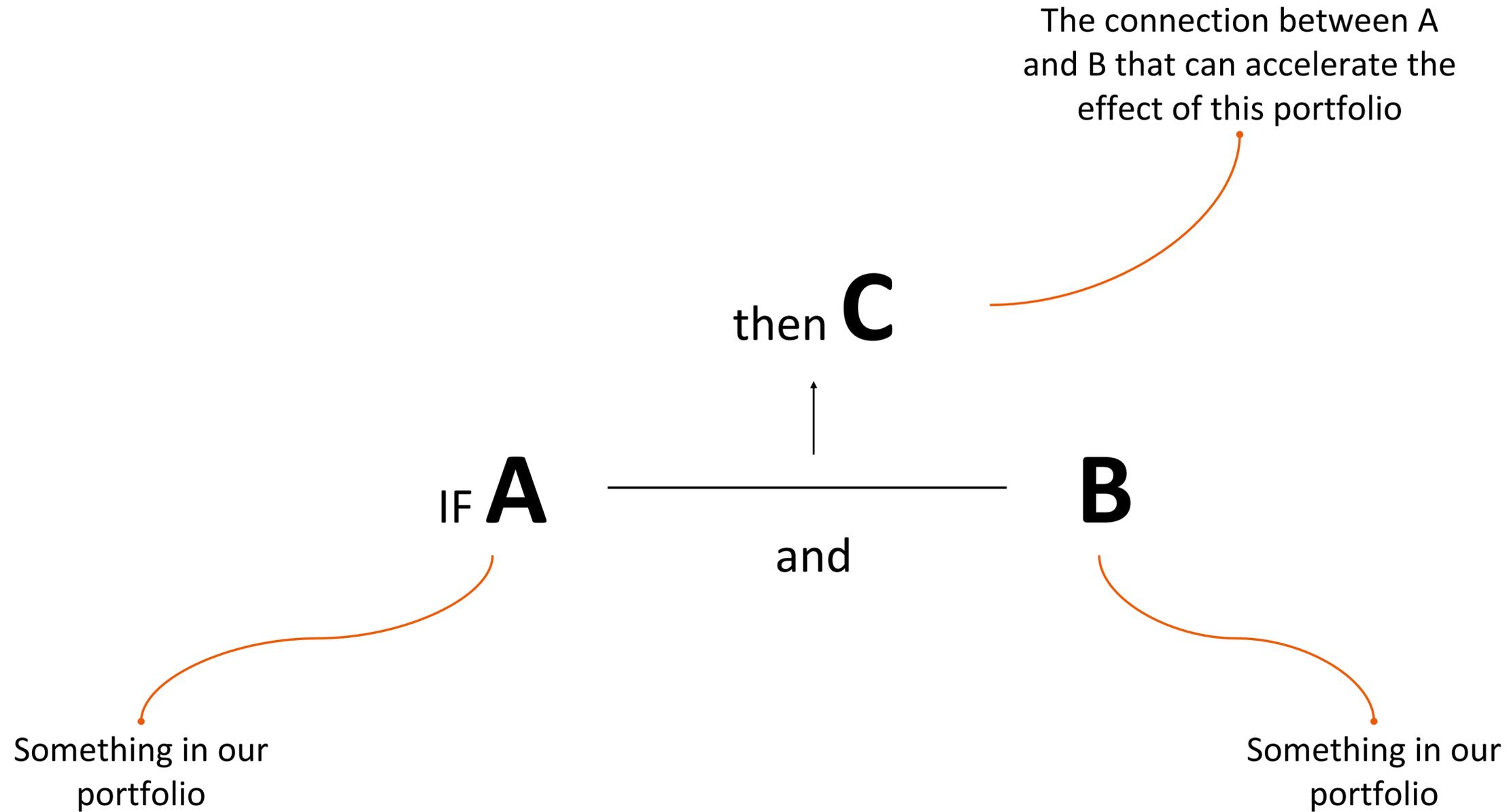
Days 2 and 3

# Surfacing emerging insights

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30 minute group exercise

# Emerging Connections



# The What and Why of the ABC activity

## What?

ABC is about naming untapped points of collaboration (learning, sharing, doing) across current projects

- Effort to identify tangible ways to be more efficient and effective with our resources (implementation strengths, staff, financial resources, partnerships)
- Innovative collaborations that birth new ideas and work (two portfolios of work coming together)

## Why?

To start to integrate our work across the team/office so we can have a more systematic and systemic impact

# *What can the ABC's look like?*

*A + B = C*

*PLASTIC WASTE  
WORK*

*SUSTAINABLE TOURISM  
WORK*

*PLASTIC-FREE TOURISM  
COLLABORATIVE WORK*

*\*Insert examples\**



# Formulating a strategic argument

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Articulating our Claims

policy | decision-making

# STRATEGIC ARGUMENT

logic

is the formal & logic arrangement  
of **INTELLIGENCE** outcomes

derived of  
sensemaking  
outputs

to structure, induce, and support  
a decision-forming process

socialised

make happen | action

aimed at effecting **STRATEGIC INNOVATION.**

Its value is the function

of an inductive architecture:

**PREMISES**

(why)

possible | probable

**PROPOSITION**

(what)

robust | persuasive

**CONCLUSION**

(how)

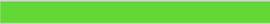
generative | actionable

# Claims

Can be what you are doing well and need to do more of

Can be what you need to do differently completely, or do differently more often

Can be noting what capabilities you need to develop as an office to move closer to your intent and the kind of impact you want to have in your industry/country



# Writing up Claims

Each Insight get its own claim

**Headline** [Title of Claim]

**Insights** [What **realization** did you gain, based on what you have heard and observed from the discussion till date?]

**Consequences** [What is the implication/ consequence of this insight for the office moving forward? What should the organization need to **do differently**? What **new options** does this insight present for the organization?]

**Evidence** [What **examples** from the previous exercises form the basis of your insight/observation?]

# Generating Intelligence

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Knowing what we now know, what do we want to do?

# Propositions

Basic structure of a proposition:

Go **HERE...**

A specific feature or opportunity  
within your portfolio

...to do **THIS**

The change that  
needs to happen to  
accelerate the effects  
of your portfolio

....in **THIS WAY**

The features of your  
recommendation

# Revisit the Statement of Intent

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# Statement of Intent

**Insert Statement of Intent**



# Writing up Propositions

**Headline** [Title of Propositions]

## **Key Features**

- What is the change you are proposing?
- Where will this change take place? (is this in how you work together as people, and/or in your project design/implementation/impact assessment, etc.)
- What effect will this have on the team/office?

## **Actions:**

- What resources (people, time) will you have to commit?
- How will you break this up into manageable bite-sized actions?

# Statement of Intent

**Insert Statement of Intent**