Portfolio Sensemaking Workshop

[Team/Office Name]

[Dates]
Setting the scene
[opening by leadership]

- Why the team is doing the portfolio sensemaking exercise at this moment
- How might sensemaking contribute to the team’s work
Reviewing the Statement of Intent
Statement of Intent

Insert Statement of Intent
Group discussion:

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
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?

Unpacking the multi-day session
By the end of our sessions...
**Funneling** versus **Layering**

**Funneling**
- By selection
- Efficient
- Short-term
- Hard to scale-up
- Reduces network effects
- Transactional & de-meaning

**Layering**
- By concentration
- Effective
- Sustainable over time
- Grows organically
- Enhances systemic effects
- Coherent with intent
Agenda
What role does the team want to play, and what does it want to achieve in the industry/country context?
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

Source: Axilo
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?

Day 1
Day 2
Day 3

Source: Axilo
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?

Start articulating insights on patterns

Day 1
Day 2
Day 3

Source: Axilo
What have we done so far?
What have we gained?
Start naming the patterns, and where we see them (the interconnections, gaps).
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

Source: Axilo
Making sense of our portfolio
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
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)
What do you still want to know about the project?
Window mappers (1 min each)

• TOP 1-2 insights only
Group discussion (10 mins)

• 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:

Days 2 and 3
Surfacing emerging insights
30 minute group exercise
Something in our portfolio

IF A

then C

and

B

Something in our portfolio

The connection between A and B that can accelerate the effect of this portfolio
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

Articulating our Claims
STRATEGIC ARGUMENT

is the formal & logic arrangement
of INTELLIGENCE outcomes
to structure, induce, and support
a decision-forming process
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

Source: Chôra Foundation
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

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

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

Basic structure of a proposition:

Go **HERE**...

...to do **THIS**

...in **THIS WAY**

A specific feature or opportunity within your portfolio

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

The features of your recommendation
Revisit the 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?
Insert Statement of Intent