Portofolio Analysis

What is it and why should you use it?
This tool helps you to assess your existing portfolio and identify opportunities for portfolio development. Key question is, how does, or how can, UNDP support governments to tackle their most challenging issues?

How to use it
You may use this tool individually, with your team or wider network of colleagues and stakeholders to to assess you existing and future portfolio.

Step 1 - Mapping: There are nine sections in the diagram on the right. Start with section 1 and end with section 9: going from past, to present to future. Each section has one or more questions, map out your answers on the sheet. For section 1, 4 and 7 consider all the issues a country is dealing with, look beyond your own project team, or expertise area.

Step 2 – Drawing connections: Once you have mapped out the answers, draw connecting lines between issues, policies and projects that are related.

Step 3 – Identify gaps and opportunities: Lastly, discuss the gaps you see with the group? Discuss in particular the the gaps you identified in the future sections. What should UNDP do to help governments solve their most challenging issues? How might the offer look like?

Example
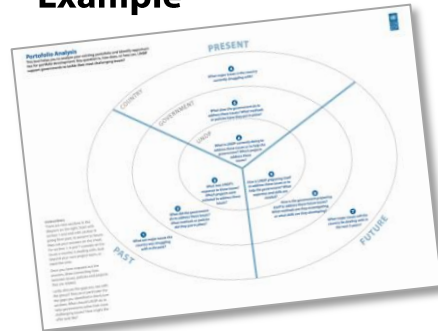
The sheet is divided into three periods of time: past, present and future. Each period is divided in country (to map out the issues or challenges a country is dealing with), government (to map out the government response to the issues), and UNDP (to map out the projects that support the government)

Materials
Markers (it's preferable to use markers, so you can photograph them... information is less visible if you use a fineliner or pencil)

Tips
- For discussing the future issues, try to look beyond your own field of expertise, or current project. Consider wider issues that the country might face in the near, and perhaps far away, future (e.g. aging population, human capital flight, ecological issues, financial instability)

User Journey Map

What is it and why should you use it?

As a starting point for improving your services, you may be asking yourself: How do people experience our services? What would their experience look like? A customer journey map is a tool used for capturing a user's experience of a service.

For example, when you were travelling to get here today, you may have used several services through their "touchpoints" - these are points of contact where service users (you) and service providers (i.e. taxi) interact.

The map creates a story of the user's experiences by pinpointing the di erent interaction touchpoints. It will give an understanding on how the user experienced the interaction with the service and how they felt.

This map will help you empathise with the people who use your services and identify pain-points or opportunities for improving your services. By visually creating the user journey, it becomes almost obvious where the pain-points and opportunities are - these insights may bring up a totally new vision of the user experience.

How to use it

Do a short 10-15 minutes interview and map the journey as you go along.

Step 1 - Starting the conversation: Ask your respondent about the moment when they started thinking about using the service (e.g. for a holiday, that moment is when someone starts making plans for a holiday). What is the first touch-point they encountered (e.g. browsing a website of their favourite travel agent)?

Step 2 - Capturing the touch-point: Write down the name of the touch-point on a post-it. You can also make a drawing. But make sure that it is self-explanatory to an outsider.

Step 3 - Probe for experiences: How did your respondent experience using that touch-point/service? Was it a positive, neutral or negative experience?

Step 4 - Positioning the post-it: Position the post-it starting from the left of the sheet (beginning of the timeline), and position it vertically corresponding with the respondent's experience (positive, neutral, negative). You may check with the user if you put the post-it in the right place (vertically).

Step 5 - Repeat step 3 and 4 for each step in the journey.

Step 6 - Reflecting on the map: Confirm with the respondent that this map represents their journey, or if they have any comments? You may probe for a deeper understanding, by asking the respondent "Why does this touch-point have the most positive/negative emotional response for you?" (while pointing at the highs or lows on the sheet).

Step 7 - Connect the different touch-points: Draw a line between each touch-point. You can do several interviews with many more respondents and repeat this process. At the end you will have a collection of stories, that allow you to identify patterns in how people use your service. What are the (common) pain-points you see? Or what opportunities may you need to explore further?

Example
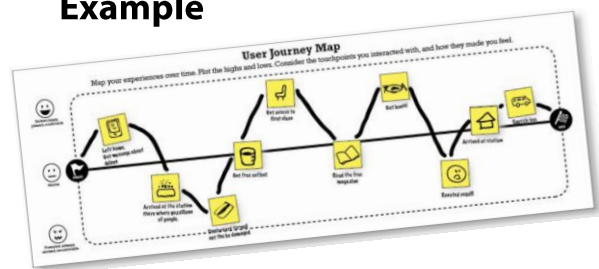
Example of User Journey Map The horizontal axis represents time, on the vertical axis you'll see three smileys that range from happy, to neutral and frustrated, they represent the emotional response to the use of a touch-point.

Materials

Customer Journey Map sheet
Markers It's preferable to use markers, so you can photograph them... information is less visible if you use a fine-liner or pencil)
Post-its

Tips

• You can make your own Customer Journey Map in case you don't have print out. Take a flipchart sheet for example, fold it in half. Draw a horizontal line in the middle of the sheet, then a vertical line on the left side of the horizontal line. Add a "Start" and three smileys to the left (a happy, a neutral and a frustrated smiley) and "End" to the right

• Pick the key touch-points (e.g. your train was late and you were really frustrated)

• Look for gaps or opportunities for new solutions to improve the experience

• Keep it simple

Assumption Testing Plan

What is it and why should you use it?

The problem statement of your (tentative) project plan often includes assumptions that you are not aware of. Before furthering you plan, and allocating vast amounts of time and resources to it, it is important to be aware of these assumptions. The Assumption Testing tool helps you to identify you assumptions and translate them into a set of testable hypotheses. This tool helps you to identify these assumptions and translate them into testable hypotheses.

How to use it

You may use this tool individually, with your team or wider network of colleagues and stakeholders to evaluate and improve your (tentative) problem statement.

Step 1 – Defining the problem: Write down your problem statement. For example: *"How might we present data /statistics in such a way so that policymakers take action?"*

Step 2 – Identifying assumptions: Have a good look at your problem state and identify facts (things you know for sure and that you can warrant with evidence, evidence might be a personal observations, experience, or academic research) and assumptions (things that are considered as true, without having evidence). Write down your assumptions. If we take the problem statement from step 1, then the main assumption is that *"Policymakers will act when they have data"*, but also that *"Qualitative (e.g. stories) is not good enough for policymakers"*

Step 3 – Formulate your hypothesis: For each assumption, develop a testable hypothesis. This hypothesis is formulated as a conditional if-then statement. Ask yourself the following question: if this condition is true, then what would be the observable outcome? Write down the condition in the "if field" and the observable outcome in the "then field". For example: "If policy-makers have data" (condition), then "They will act" (observable outcome).

Step 4 – Plan a test: For each if-then statement, devise a test that helps you evaluate your hypothesis. Plan initially for simple tests, things that don't require a lot of resources or time, and which you can start doing tomorrow. To evaluate the hypothesis in step 4, the test could be as follows: *"Present an info-graphic with loads of data and see if they take action"*.

Example
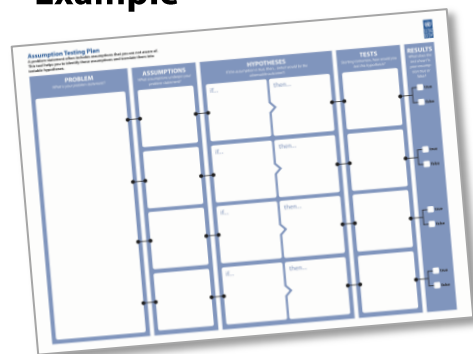
The sheet is divided into different sections: problem, assumptions, hypotheses, tests and results. By going through this sheet from left to right, it helps you break down your problem statement into testable hypotheses.

Materials

Markers (it's preferable to use markers, so you can photograph them... information is less visible if you use a fine-liner or pencil)

Tips

• It is best to use this tool in a group discussion. Invite critical friends to help you surface or uncover your assumptions. Because, often you're are not aware of these assumptions, whereas you consider them as a fact.

Project timeline

What is it and why should you use it?
At the end of a project, there is a natural moment to reflect back on the process, evaluate key decisions and extract lessons learned. The Project Timeline tool, supports such a reflective conversation. It is equally important to look forward as well, what are the opportunities you see for future projects? What patterns did emerge form the conversation, and what knowledge can be transferred to other activities?

How to use it

You may use this tool individually, with your team or wider network of colleagues and stakeholders to reflect on your process. A session might take 1.5 to 3 hours.

Step 1 – Plotting the dates: Put the worksheet in the middle of the table, or put it on the wall. Start on the left side of the paper with writing down the starting year of the project, this is the moment you started working on the proposal or project plan. On the right side, write down the current year. In between, map out the other years.

Step 2 – Initiation: Write down at the starting year, what was the reason or condition the project was initiated.

Step 3 – Mapping key moments and decisions: from initiation map out the key moments, decisions and activities. You might rely on the collective memory of the team. Write down each moment, decision or activity on a post-it note. Using post it notes makes it easier to correct mistakes and move them around.

Step 4 – Reflection: Once you have complete the timeline, reflect on the key moments or decisions. Which one were crucial and changed the course of the activities? What were "aha-moments"? What (spillover) value was generated from the project (e.g. social cohesion, more sustainable behaviour)? How was this value created? What would you do differently if you had the opportunity to start this project all over again?

Step 5 – Extracting lessons learned: What lessons could you draw from this project? What knowledge, ways of working, tools could you transfer to other projects? How might you facilitate this knowledge transfer?

Step 6 – Future opportunities: What could be follow up projects?

Example

The sheet is divided into different sections: problem, assumptions, hypotheses, tests and results. By going through this sheet from left to right, it helps you break down your problem statement into testable hypotheses.

Materials

Markers (it's preferable to use markers, so you can photograph them... information is less visible if you use a fine-liner or pencil)

Tips

- It is best to use this tool in a group discussion. It is best if this session facilitated by an outsider, allowing you to surface tacit knowledge.
- You can make your own Project Timeline sheet in case you don't have a print out. You can glue together a number of flipchart sheets, or you can take a roll of wall paper, or brown-paper to use as a canvas. You may need 2 to 3 meters for a 10 year project. Draw a horizontal line in the middle of the sheet. Add a "Start" and three smileys to the left and "End" to the right