Deep Demonstrations Design Process
Process Guide
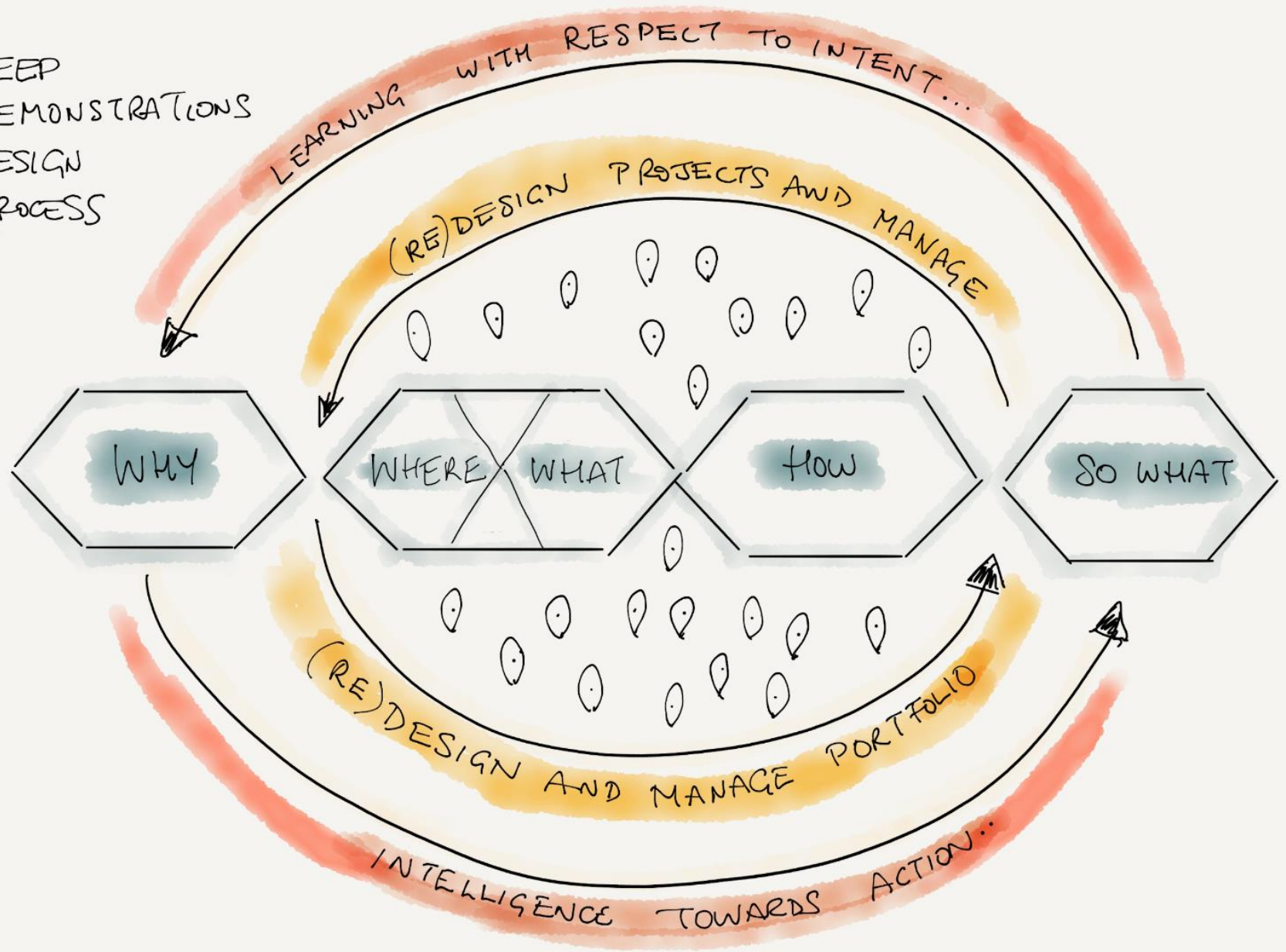
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DEEP
DEMONSTRATIONS
DESIGN
PROCESS

LEARNING WITH RESPECT TO INTENT...

(RE)DESIGN PROJECTS AND MANAGE

WHY

WHERE WHAT

HOW

SO WHAT

(RE)DESIGN AND MANAGE PORTFOLIO

INTELLIGENCE TOWARDS ACTION..

Deep Demonstrations
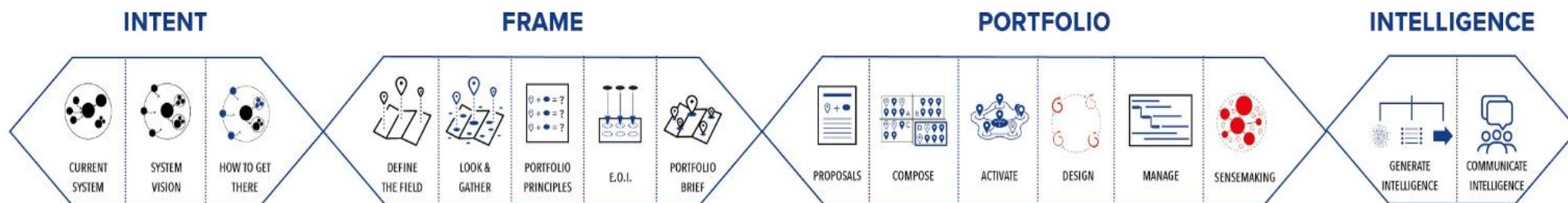
CONCEPTUAL OVERVIEW

Deep demonstrations (testbeds) of such changes are central part of EIT Climate-KIC's *Transformation, in Time* strategy.

Deep Demonstrations start with a demand-led approach, working with organisations willing to take on the responsibility of acting as 'problem owners': city authorities, regional bodies, community organisations, governments or industry leaders committed to zero-net emissions, resilient futures.

Deep demonstrations progress in tightly designed, iterative phases - steps of rolling out systems innovation-as-a-service.

This Deep Demonstrations Process Design manual provides the architecture, objectives and tools for those phases.

Deep Demonstrations Design Process
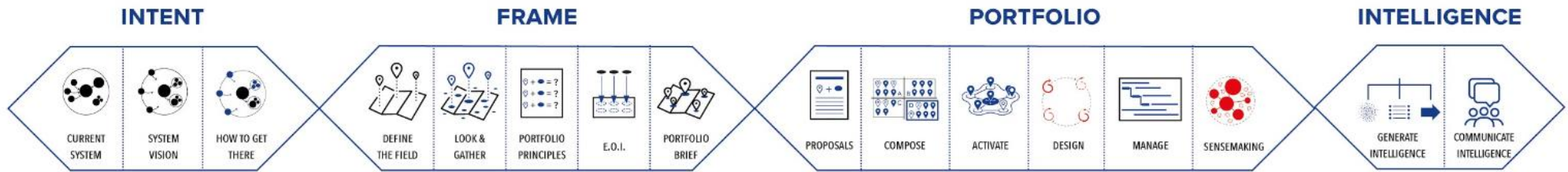
Deep Demonstrations

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Deep Demonstrations Design Process

INTENT is the set-up phase of the Deep Demonstrations process.

It is designed to establish directionality, to scope needs, vision and objectives for systemic change and ultimately to agree to work together on a Deep Demonstration innovation portfolio focused on catalysing radical transformation of systems.

It creates an opportunity to understand, and embrace existing programmes and commitments and bring them within a portfolio logic.

FRAME is about defining the field for innovation action, building understanding through positioning about how innovation might achieve the vision for transformation

This phase is made up of steps that are inherently iterative. They are designed to articulate why we want to deploy innovation, where, what to leverage and where to position ourselves to test for emerging, breakthrough possibilities as well as scaling potential

The portfolio brief that emerges from this stage provides a frame of reference for learning and generating intelligence from innovation

PORTFOLIO is the core of the Deep Demonstrations approach. It commences with a call for proposals for solutions to catalyse change or to learn about possibilities for transformation based on the framing and positioning work done in the previous phase.

What follows is selection and activation of an initial combination of innovation initiatives, using a portfolio composition process. Subsequently the process engages partners in co-creation or co-design for effective learning and potential synergies and/or complementarities.

In this phase, innovation initiatives are supported through dynamic portfolio management and regular sense-making with the intention of accelerating the pace of learning about obstacles and barriers to innovation, potential multipliers, more or less effective leverage points, integration effects and pathways to scaling.

INTELLIGENCE is the ultimate objective of the Deep Demonstrations process. By intelligence we mean input prepared for decision makers to enable action. Intelligence is the outcome of sense-making and analytics drawing on innovation experience and learning from multiple different experiments deploying diverse leverage points.

Deep Demonstrations Design Process: Intent

INTENT

CURRENT SYSTEM | SYSTEM VISION | HOW TO GET THERE
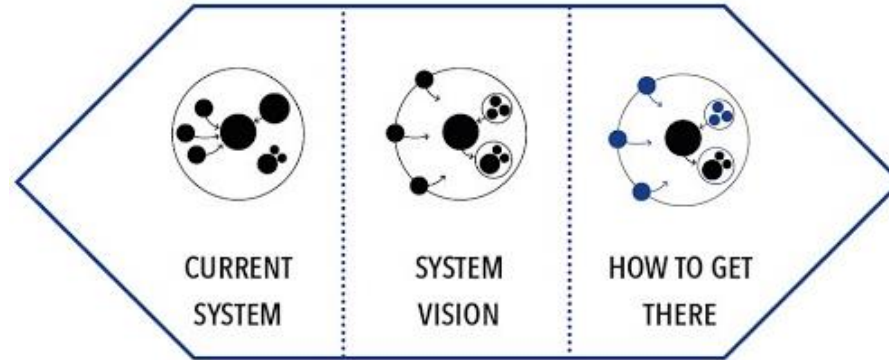
DESCRIPTION (What is it? Why do it?)

- **Intent** is the set-up phase of the Deep Demonstrations process.
- It is designed to establish directionality, to scope needs, vision and objectives for systemic change and ultimately to agree to work together on a Deep Demonstration innovation portfolio focused on catalysing radical transformation of systems.
- It provides a centre of gravity and sponsorship for the whole process by identifying and engaging relevant problem owners or cohorts of problem owners who have the political will and practical means to work in a co-design and co-learning mode throughout the process.
- It creates an opportunity to understand, and embrace existing programmes and commitments and bring them within a portfolio logic.

OBJECTIVES

- To agree who we will work with, on what and why.
- To acknowledge the need to think in systems and make visible system dynamics, qualities and relevant leverage points or intervention points.
- To build a shared understanding of innovation as a point of difference that is non-linear, focused on accelerating learning and designed to surface opportunities for catalysing change in systems.
- To explore, identify and agree the systems to work on and a vision of structural change to work towards.
- To arrive at a joint understanding and agreement as to shared objectives, outcomes, needs, time frames and ways of working.

OUTCOMES PRODUCED

- A frame of reference for approaching innovation deliberately, systematically, systemically through a portfolio approach and sense-making in order to manage uncertainty and generate options and intelligence from innovation experience.
- An agreed intent on where to direct innovation effort in relation to need, vision and ambition for change.
- A Memorandum of Understanding signed by all the parties to reflect joint understanding and agreements
- initial exploration and scoping of suitable special purpose vehicles for risk sharing and joint funding.

WHY: Current Systems Features and Dynamics

Objectives & Outcomes:

- To build a picture of transformations needed and current commitments to change - in service of both decarbonisation and adaptation.
- To map out the major systems implicated in both and identify key characteristics, cause and effect relationships, root causes, relevant leverage points.
- To characterise context in terms of culture, sense of self / identity, patterns and habits of behaviour, needs and concerns

Who does it?

- Identify who you should be working with or having this conversation with to make this change happen.

How is it done?

- Establish a starting frame for outcomes, impact and grant funding deliverables.

When does it happen?

- xxx

How long does it take?

- xxx

Materials and Tools

- xxx

ACTIVITIES

Design:

- Identify why you need to change
- Identify what you need to understand about systems that you need to change and what the moveable levers are
- Understand and define the problem, through existing materials or new work. What needs to change and why? What is the relation between the status quo and;
  - Carbon emissions
  - Biodiversity loss
  - Resource capacity
  - Climate change effects
- Map and integrate existing commitments, analyses and innovation or transition activities into the field of view
- Agree on the systems to review and structural changes to address or work towards.

Relationship:

- Work with key stakeholders who represent problem owners or the cohort of problem owners.
- Work with local and international experts with knowledge of the specific systems being addressed.

Project Mgmt:

- Draw up a memorandum of understanding (MOU) with problem owners.

Finance:

- Scope special purpose vehicles and design.

Capabilities & Mindsets to Bring:

- Qualitative judgment
- Problem awareness and direct relationship need
- Adaptive decision making
- Develop a robust and bold vision
- Cross-functional teamwork
- Intercultural communication skills

Inputs in requirements:

- Climate commitment and roadmap that is ideally specific
- Climate emergency plans
- SDGS - relevant and specific
- Existing analyses

Outputs it produces:

- Statement of intent
- Systems to working on
- Identify changes to make happen

Outcome and levers

- Identify what can we put hands on
- Risk assessment and capability statement

What to look out for?

- Not proposing to substitute or replace but embrace, frame, reframe, understand, accelerate, augment, add to existing work.

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WHY: Vision for the future

Objectives & Outcomes:

● To develop or identify a vision for the outcomes of transformation - an ideal or 'desirable' vision and identity - achieved as a result of implementing decarbonisation and climate resilience

● To use a vision building process to sense and scope the limits of appetite and ambition

Who does it?

● Problem owner or owners

● Policymakers

● Community

● Innovation actors

● Upstream or downstream stakeholders

● Climate-KIC Operations and legal team to conclude MOU and deal team to progress to the next stage.

How is it done?

● Intent workshop with key stakeholders

● Qualitative interviews

● Information gathering research

When does it happen?

● xxx

How long does it take?

● xxx

Materials and Tools

Create a visualisation tool to capture the territory or territories we will explore

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ACTIVITIES

Design:

● Identify what vision are we working towards or aspire to work towards; bringing together existing material and/or using a vision building process

● Explore and identify elements and characteristics of a distinctive ideal state identity - business identity or city / region / national identity - that underpins the vision

● Understand what we are willing to tackle - what are the limits or boundaries of ambition and commitment to transformation; who is the problem or opportunity holder when it comes to the sense of limits

● Engage in stakeholder mapping using the vision to identify early adopters and transformation champions

Relationship:

● Work with problem owners or the cohort of problem owners to craft systems change vision.

● Work with other relevant stakeholders who

Project Mgmt:

● Map system change milestones with problem owners.

Finance:

● Identify required resources

Capabilities & Mindsets to Bring

● Visualisation

● Curious mindset

● Active listening and asking questions for understanding

● System thinking (seeing)

● Subject matter expertise

● Awareness of; why me, why now, why us

● Openness

● Reflective and deliberate review

Inputs in needs

● Awareness of existing innovation programmes

● Understanding of current planning horizons, policy documents and relevant regulations.

Outputs it produces

● A representation of possibility and aspiration

● A frame of reference for subsequent choices and decision making

What to look out for?

● Avoid a shift towards planning, technical assistance, consultancy work and incremental makeover.

● Ensure a focus on the role of innovation in unlocking transformation and exploring possibilities.

AXILO

WHY: How and what needs to change to get there

Objectives & Outcomes:
- To identify what needs to change for the vision / transformation to be possible
- To build understanding of moveable levers for change and relevant intervention points
- To decide where to direct innovation effort

Who does it?
- Problem owner or owners
- Policymakers
- Community
- Innovation actors
- Upstream or downstream stakeholders
- Climate-KIC Operations and legal team to conclude MOU and deal team to progress to the next stage.

How is it done?
- Intent workshop with key stakeholders
- Qualitative interviews
- Information gathering research

When does it happen?
- xxxx

How long does it take?
- xxxx

Materials and Tools
- Enhance the visualisation tool to capture the territory or territories we will explore.
- Project plan

ACTIVITIES

Design:
- Identify what needs to change for that vision / outcome to be possible and map possible intervention points and moveable levers for change
- Explore the need and opportunity for innovation to intervene at different points in the systems required to transform and / or to generate radical alternatives
- Explore and agree priorities and intent

Relationship:
- Work with problem owners or the cohort of problem owners to understand how and what needs to change.
- Work with relevant experts and analysts of systems and systemic change
- Work with local communities, policy makers, innovation actors, supply chain actors

Project Mgmt:
- Map change pathway with problem owners.
- Map governance structures.
- Map communication mechanisms.

Finance:
- Identify required resources.

Capabilities & Mindsets to Bring
- Active listening and asking questions for understanding
- System thinking (seeing)
- Subject matter expertise
- Reflective and deliberate review

Inputs in needs
- Connections with existing innovation programmes
- Overlay of current planning horizons, policy documents and relevant regulations.

Outputs it produces
- Ability to progress to the next stage
- A Statement of intent
- An MOU
- Engagement of the Deal team
- Identification of working team

What to look out for?
- Avoid a shift towards planning, technical assistance, consultancy work and incremental makeover.
- Ensure a focus on the role of innovation in unlocking transformation and exploring possibilities.

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Deep Demonstrations Design Process: Frame

FRAME

DEFINE THE FIELD · LOOK & GATHER · PORTFOLIO PRINCIPLES · E.O.I. · PORTFOLIO BRIEF
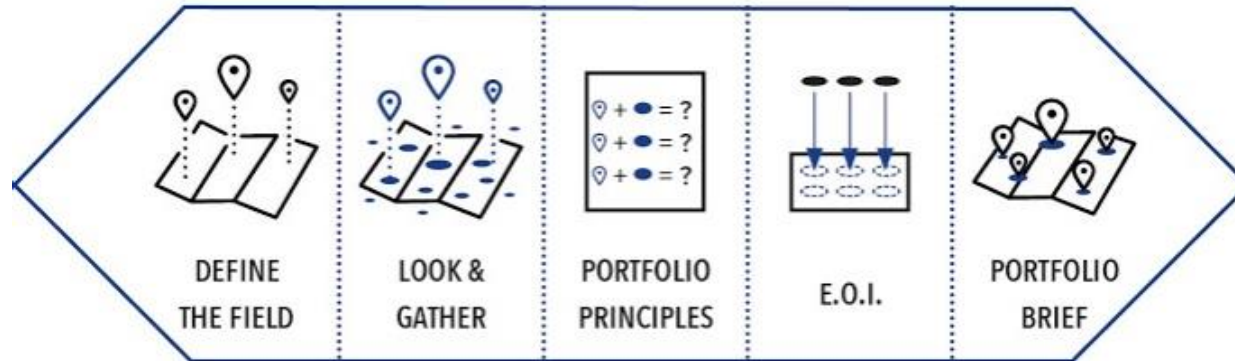
DESCRIPTION (What is it? Why do it?)

- **Frame** is about defining the field for innovation action, building understanding through positioning about how innovation might achieve the vision for transformation
- This phase is made up of steps that are inherently iterative. They are designed to articulate why we want to deploy innovation, where, what to leverage and where to position ourselves to test for emerging, breakthrough possibilities as well as scaling potential
- It is an important step to create space for deliberate hypotheses, design principles, choice, exploration and discovery of new possibilities and unexpected approaches rather than running straight to solutions
- The portfolio brief that emerges from this stage provides a frame of reference for learning and generating intelligence from innovation

OBJECTIVES

- To articulate where to direct innovation effort and why - in relation to what - what to leverage, how and why.
- To identify cause and effect relationships, dependencies and opportunities to look for breakthrough possibilities
- To generate awareness of and opportunities to move beyond defaults, core assumptions and biases
- To encourage a deliberate stretching of boundaries - look beyond edges of known to usual actors, outliers, positive deviants
- To identify who could do it, why and where is appropriate - framing a portfolio hypothesis described in terms of innovation positions
- To create conditions for the unexpected

OUTCOMES PRODUCED

- Map of the territory of needs and opportunities for systems innovation
- Reconnaissance briefs
- Design Principles for the portfolio - both general and specific - to inform and frame the choice of specific proposals and solutions to be tested
- Hypothetical portfolio design - articulated as a series of positions
- Terms of reference and a learning brief for call for proposals and portfolio composition

WHERE: Define the field

Objectives & Outcomes:

- To build understanding through positioning how innovation can achieve the vision.
- To articulate why, where, what to leverage and create space.
- To generate space for discovery and open possibilities rather than run to solutions.

Who does it?

- Partners chosen to work on phase 1 and 2 through RFP.
- Problem owner or owners
- Climate-KIC teams.
- Community members.

How is it done?

- Face to face workshop with key actors to establish momentum and TORs.

When does it happen?

- Positions need to be designed for phase 3, understand how and what needs to change to get there.

How long does it take?

- xxx

Materials and Tools

- Visualisation tool and project plan

ACTIVITIES

Design:

- Define the field through the identification of what positions we want to take.
- Understand places where innovation could be directed, could intervenes or is already at work.
- Consider points of intervention that are spatial, system dynamic, and angles of engagement:
    - We need to position ourselves to learn about....
    - Go where...(such and such is happening)
    - Look from....
    - Take a position in/where....
- Zoom in on where would we place ourselves to intervene, experiment and learn.
- Understand what choices do we have and what are our/the priorities for this system.

Relationship:

- Work with problem owners or the cohort of problem owners to define the field

Project Mgmt:

- Map the field with problem owners.
- Build out governance structures.
- Build out communication mechanisms.

Finance:

- Identify required resources.

Capabilities & Mindsets to Bring

- Systems thinking
- Imagination mindset with the possibility of what might be
- Looking for what is not there
- Deliberate diversity

Inputs in needs

- Commission and gather any required analytics

Outputs it produces

- Map desired positions
- Create a first iteration sketch of a hypothetical portfolio

What to look out for?

- Open a space that is generative to discuss, negotiate the position landscape.

OLIXA

WHERE: Look and Gather

Objectives & Outcomes:

- To gather information about innovation interventions available or emerging
- To identify who could do it, why and where is appropriate, create space.
- To look beyond edges of known to usual actors, outliers, positive deviants.
- To encourage a deliberate stretching of boundaries; create conditions for the unexpected

Who does it?

- Partners chosen to work on phase 1 and 2 through RFP.
- Climate-KIC teams.

How is it done?

- Network intelligence
- Desktop research and outsourced search
- Community enquiry and word of mouth referrals

When does it happen?

- Three weeks of work, minimum 10 days
- Stand-ups three times a week
- Weekly remap who is looking where

How long does it take?

- One month

Materials and Tools

- Visualisation tool and project plan
- Reconnaissance report

ACTIVITIES

Design:

- Reconnaissance, through review, what is out there that we could get into a relationship with, look in Climate-KIC partner community and the world at large.
- Open up choice and understand possible, solutions and partnerships for positions.
- Understand what is happening or emerging anywhere in the world, including in our community that could be a way of taking that position.
- Identify people, companies, resources, models etc. opportunities to look for relationships and breakthrough.
- Put innovation to work in these places or learn from innovation happening elsewhere through experimentation.

Relationship:

- Work with problem owners or the cohort of problem owners on where to look an gather.

Project Mgmt:

- Map where to look and gather with problem owners.
- Build out governance structures.
- Build out communication mechanisms.

Finance:

- Identify required resources.

Capabilities & Mindsets to Bring

- What are we doing?
- What do we need to look out for?
- What are we taking?
- Identify what capability and mindset is needed.
- Reach out and establishing connections and holding them
- Research and argumentation
- Field expertise and knowledge
- Information synthesis
- Elicit unknown unknowns

Inputs in needs

- Climate-KIC Cognitive City (Exaptive), Wired magazine, Climate-KIC investor marketplace, other accelerators, partner, donor and advisory networks and word of mouth, other KICs, desktop research, other databases.

Outputs it produces

- Reconnaissance reports
- Mapping of organisations and innovation actors against desired positions to target through a call process

What to look out for?

- Research that is patterned by preferences, assumptions about sources of innovation or self-limiting in terms of range of enquiry.
- Unconscious bias
- Capabilities in networked research

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WHERE: Principles

Objectives & Outcomes:
- To articulate a robust, generative set of design principles that captures the value and the intent of the process of leveraging innovation experience in order to understand how to catalyse transformational change.
- To consolidate the insights generated in the previous phase and turn them into statements of coherence.
- To aid in the portfolio composition and management phase by determining conceptual, structural and objective elements to be used in designing innovation options

Who does it?
- Problem owner or owners
- Partners chosen to work on phase 1 and 2 through RFP
- Climate-KIC teams

How is it done?
- Face to face workshop supported by reconnaissance reports

When does it happen?
- Immediately at the conclusion of reconnaissance.
- Subsequent iterations of reconnaissance

How long does it take?
- Half day workshop

Materials and Tools
- xxx

ACTIVITIES

Design:
- Sense-making on what we have found through pattern and choice finding and identification of options.
- Design principles should be derived from multiple areas of research that emerged from the positions identified in the previous phase, and should reflect the elements that the team feels are more critical or relevant to those positions. They are a way of stating or framing the formal attributes of innovation options or interventions.
- Ask about qualities that make would make innovation interventions special / unique / different.
- Think in terms of adjectives that describe what innovation options or interventions should do or should learn.
- Craft design Principles
  - All Portfolios should...
  - This Portfolio should...

Relationship:
- Work with problem owners or the cohort of problem owners on design principles.

Project Mgmt:
- Map stakeholders and build out option project approach

Finance:
- Map budget and resource estimates over time

Capabilities & Mindsets to Bring
- Capability build, space-makers, think in 'space' spatiality, curiosity.
- Making sense during and after conversations and encounters
- Persistence perseverance
- Inclusive leadership techniques

Inputs in needs
- Typology of positions eg;
  - Policy sandbox
  - Community engagement
  - Information project
  - Awareness raising

Outputs it produces
- Design principles that are both general & specific.

What to look out for?
- Establishing design principles that optimise potential to deliver value.
- Be mindful of the key assumptions embedded in the positions chosen

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WHERE: Expressions of interest

Objectives & Outcomes:

● To issue a soft call for proposal or expressions of interest.

● To make contact with the most interesting innovation actors and solution providers identified in the reconnaissance phase.

● To establish relationships and a network that is relevant and connected.

Who does it?

● Existing Partners

● New organisations and potential partners

● Problem owner or problem owners - leveraging their network

● Partners chosen to work on phase 1 and 2 through RFP

How is it done?

● Templates ensure minimum approach maximum high-level intelligence testing desirability.

When does it happen?

● xxx

How long does it take?

● xxx

Materials and Tools

● xxx

ACTIVITIES

Design:

● Communicate intent, position and principles that help form into a soft call for proposal or expression of interest.

● Map out relationships and capabilities needed for each option.

● Go back to reconnaissance, if necessary to fill gaps, push boundaries further out and challenge biases.

Relationship:

● Work with existing Partners, new organisations and potential partners

Project Mgmt:

● Iterate map of stakeholders and build out option project approach

Finance:

● Iterate map budget and resource estimates over time

Capabilities & Mindsets to Bring

● Capability build, space-makers, think in 'space' spatiality, curiosity.

● Making sense during and after conversations and encounters

● Persistence perseverance

● Inclusive leadership techniques

Inputs in needs

● Reconnaissance and design principles

Outputs it produces

● Call for expressions of interest through a high-level summary of innovation idea and relation to others.

What to look out for?

● Keep the reconnaissance space wide and open.

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WHERE: Compose

Objectives & Outcomes:

- To review expressions of interest and determine desirability, feasibility and viability of working with a variety of innovation actors to intervene in the systems in focus.
- To run a mini-portfolio process in order to stress test different constraints and needs for a active portfolio of solutions.
- To shape a portfolio blueprint ready for a formal call for proposals.

Who does it?

- Problem owner or owners
- Partners chosen to work on phase 1 and 2 through RFP
- Climate-KIC teams

How is it done?

- One day selection and decision-making process based on documents received and sense-making undertaken.

When does it happen?

- xxx

How long does it take?

- xxx

Materials and Tools

- xxx

ACTIVITIES

Design:

- Prepare team for anticipated experience
- Set up visual installations and workshop space
- Run a mini-portfolio process to surface questions and better scope needs for a full call for proposals
- Establish a pre-proposal (desirability)

Relationship:

- Review effectiveness and coverage of portfolio landscape

Project Mgmt:

- Review stakeholder expectations

Finance:

- Review budget and resourcing implications

Capabilities & Mindsets to Bring

- Strategic argument for a particular portfolio and set of positions.

Inputs in needs

- Review relevant positions and intelligence collateral.
- Option/project proposals

Outputs it produces

- Call terms of reference; objectives and text.
- Visualisation of desired portfolio.
- Statement of learning intent.

What to look out for?

- Establish a portfolio to steward and optimise value over time.

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Deep Demonstrations Design Process: Portfolio

PORTFOLIO

PROPOSALS · COMPOSE · ACTIVATE · DESIGN · MANAGE · SENSEMAKING

DESCRIPTION (What is it? Why do it?)

- **Portfolio** is the core of the Deep Demonstrations approach.
- It commences with a call for proposals for solutions to catalyse change or to learn about possibilities for transformation based on the framing and positioning work done in the previous phase.
- What follows is selection and activation of an initial combination of innovation initiatives through a portfolio composition process.
- Subsequently the process engages partners in co-creation or co-design for effective learning and potential synergies and/or complementarities.
- Innovation initiatives are supported through dynamic portfolio management and regular sense-making.

OBJECTIVES

- To make coherent choices about projects and problems as a system of interventions.
- To encourage diversity to ensure a spread of learning and connectivity to enable identification of multiplier effects and integrated solutions
- To be more effective in leveraging deliverables focused on learning impacts
- To understand and learn from/about multiple possibilities.
- To articulate value of each innovation option as learning and the importance of sense-making.
- To accelerate pace and effectiveness of learning
- To establish clear principles for EXIT collective intent vs individual attachment

OUTCOMES PRODUCED

- Learning about obstacles and barriers to innovation, potential multipliers, more or less effective leverage points, integration effects and pathways to scaling.
- Insights and feedback loops to inform dynamic management of innovation options and the portfolio as a whole - including managing exits and introducing new solutions..
- Learning about which intervention points give greatest transformation potential.
- Growing network of innovation relationships and connections with understanding of local needs and territories.

HOW: Call for proposals

Objectives & Outcomes:

● xxx

Who does it?

● Existing partners, non-partners and new organisations.

How is it done?

● Call documents

● Reference to portfolio visualisation and strategic argument.

When does it happen?

● xxx

How long does it take?

● xxx

Materials and Tools

● xxx

ACTIVITIES

Design:

● Refer to Climate-KIC internal process

Relationship:

● xxx

Project Mgmt:

● xxx

Finance:

● xxx

Capabilities & Mindsets to Bring

● Translation into "normal world" language for external world and vice versa.

Inputs in needs

● Call terms of reference and objectives.

Outputs it produces

● Ability to progress to detailed proposals and due diligence planning.

What to look out for?

● Keep learning landscape open to enable effective deliverables.

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HOW: Responses and Assessment

Objectives & Outcomes:
- xxx

Who does it?
- Climate-KIC team, plus problem-owner team and other/partners founders.

How is it done?
- Elicit input from external perspectives; experts and advisors.

When does it happen?
- xxx

How long does it take?
- xxx

Materials and Tools
- xxx

ACTIVITIES

Design:
- Refer to Climate-KIC internal processes
- Detailed proposals and due diligence.
- Technical expert assessment through PEAS. VIAB.
- Choose subset of responses.
- Identify where proposals need to be more aligned to system change objectives.

Relationship:
- Review effectiveness and coverage of portfolio landscape in consultation with problem-owner team and other/partners founders

Project Mgmt:
- Iterate option project plan

Finance:
- Iterate resource assumptions.

Capabilities & Mindsets to Bring
- Documentation and reporting.
- Database (qualitative and quantitative) usage.
- High-level understanding of learning and its conditions.

Inputs in needs
- Sense-makingintelligence and technical expertise.

Outputs it produces
- Detailed proposals for consideration at portfolio.

What to look out for?
- Clear and defined principles for exit based on collective intent.

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HOW: Portfolio Composition

Objectives & Outcomes:

- To make a selection of innovation options or interventions for each position using a portfolio composition approach.
- To make coherent choices about projects and problems based on design principles and theories of systemic change.
- To be more effective in shaping deliverables for learning impacts
- To bring learning from innovation experience to bear on portfolio composition and selection choices on an iterative basis.

Who does it?

- Climate-KIC Portfolio team, deed demonstration team, funders, problem owners.

How is it done?

- See portfolio composition.

When does it happen?

- Workshop, face to face

How long does it take?

- 4 day process

Materials and Tools

- xxx

ACTIVITIES

Design:

- Breathe in- build a collective understanding of the portfolio landscape and project positions.
- Attribute value - consider existing and new innovation proposals from multiple perspectives to understand their value as stand alone solutions, in relation to one another and in context..
- Select - Make a selection of innovation solutions for the positions identified in the previous phase, privileging deliberate choices for diversity around intervention points and potential linkages and synergies between choices.

Relationship:

- Collaborative review and assessment

Project Mgmt:

- Iterate project plan based on portfolio outcomes

Finance:

- Resource assessment based on portfolio outcomes

Capabilities & Mindsets to Bring

- High level reflection.
- Negotiation.
- Awareness of the whole portfolio over single options.
- Overcome groupthink tendencies.

Inputs in needs

- Project proposals, positions
- Portfolio selection visualisations

Outputs it produces

- Effective management of Climate-KIC strategy.
- Mental model of portfolio landscape and rationale for potential compositions
- Sense-makingon the portfolio effectiveness that enables dynamic management
- New portfolio composition pending activation

What to look out for?

- Qualitative judgment and collective review and assessment.
- Delivery of strategic intelligence about the nature and dynamics of change, models, resources and capabilities.

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HOW: (de)Activate Options

Objectives & Outcomes:
- xxx

Who does it?
- Involve social innovation and community team, and education team.

How is it done?
- Project management set up.
- Develop terms of reference, learning intent task confirmation, Sense-making schedule.

When does it happen?
- xxx

How long does it take?
- xxx

Materials and Tools
- Organisational reporting, PMO tracking and decision-making tools

ACTIVITIES

Design:
- Activate portfolio, program and individual option 'projects'
- Define deliverables
- Plan stage gates
- Plan Sense-makin
- Criteria for exit
- Social contracts, convene and prepare Option project team
- Engage Option Partner in conversation about the rationale, value and learning objectives of the project
  - Explore and negotiate scope of Option activities
  - Articulate a mutually beneficial statement of intent for the relationship

Relationship:
- Engage Option Partner in conversation about the rationale, value and learning objectives of the project
  - Explore and negotiate scope of Option activities
  - Articulate a mutually beneficial statement of intent for the relationship

Project Mgmt:
- Agreement on communication frequency and approach
- Satisfy organisational governance requirements
- Create a stakeholder needs and engagement map/plan
- Plan for and detail all activities relevant to the engagement, including facilitated reflective activities and sensemaking, Portfolio Composition, intelligence generation and reporting
- Set-up relevant project and knowledge management systems and tools
- Ensure necessary capabilities and resources are available
- Identify key project inflection points and resource intense periods to
- inform overall portfolio management.

Finance:
- Establish resource and financial tracking mechanisms
- Confirm available capabilities, resources and conditions for activation

Capabilities & Mindsets to Bring
- Learning how to learn through conversations
- NDA/IP/Contracting
- Quality research skills, basic (hypothesis, asking questions, synthesising info.

Inputs in needs
- Non-Disclosure Agreement
- Option Summary
- Statement of Intent template
- Budget

Outputs it produces
- Shared intent for Active Option project and relationship
- Option contracts
- Payment terms and schedule
- Risk assessment
- Finalised formal option project management approach that includes terms of reference, learning intent task confirmation, Sense-making schedule.

What to look out for?
- Create and satisfy all governance, legal and procedural requirements for the Option project, for all parties involved.

AXILO

HOW: (re)Design Options

Objectives & Outcomes:

● xxx

Who does it?

● xxx

How is it done?

● Stage gate meetings to determine funding, Sense-making workshops - one - many projects.

When does it happen?

● xxx

How long does it take?

● xxx

Materials and Tools

● xxx

ACTIVITIES

Design:

● Actively relate with the partner to generate relevant learning?

● Re-design relations as required by portfolio composition and Sense-making.

● Design each Option activity to maximise experience and potential learning value.

● Manage the progression of Option activities with respect to the learning position to maximise experience and deliver on the learning objectives.

● Anticipate and iterate Option timeline

● Ongoing assessment of the effectiveness of the Option and Position

Relationship:

● Manage relationships, option team, option partners and internal/external stakeholders

Project Mgmt:

● Manage and monitor use of project and knowledge management systems and tools

Finance:

● Manage and maintain PMO finance resource.

Capabilities & Mindsets to Bring

● Saying no/disagreeing and staying connected.

Inputs in needs

● Typology of learning relationships.

● Design how the team will:

　○　be in the experience

　○　interact with the experience

　○　use the learning objectives in the experience

　○　capture relevant reflective

　○　observations and insights

Outputs it produces

● Deliberate engagement in each Option activity to gain experience and learning.

What to look out for?

● Implement experience design

● Reflectively observe experience

● Individually capture observations and insights

AXILO

HOW: Manage Learning Relationships

Objectives & Outcomes:

- Articulate value of an option as learning and the importance of Sense-making.
- Understanding and learning from/about multiple possibilities
- Clear principles for EXIT collective intent vs individual attachment

Who does it?

- xxx

How is it done?

- State gate meetings to determine ongoing funding
- Sense-making workshops - one for many projects

When does it happen?

- xxx

How long does it take?

- xxx

Materials and Tools

- xxx

ACTIVITIES

Design:

- How do we need to be 'in' this relationship to learn from it?
- Implement project plan
- Manage relationships to create mutual benefit

Relationship:

- Collective management and participation

Project Mgmt:

- Prepare Option project updates/reports

Finance:

- Prepare financial project updates/reports

Capabilities & Mindsets to Bring

- Cur

Inputs in needs

- Engagement in each Option activity

Outputs it produces

- Share and make sense of Option experience.
- Capture relevant observations, reflections and insights.

What to look out for?

- Effectiveness of Option experiences and Sense-making

AXILO

HOW: Sense-making on Learning Relationships

Objectives & Outcomes:

- Understanding and learning from/about multiple possibilities
- Learning which intervention points give greatest change potential
- Accelerate pace and effectiveness of learning
- More effective in deliverables learning impacts
- .

Who does it?

- Sense-making with agents of change - current and future
  - Communities, Bureaucrats, Decision makers

How is it done?

- Create an experience of option and portfolio learning that enables problem owners to make sense for themselves.

When does it happen?

- Cadence: Sense-making in layers
- How often/when is whole portfolio Sense-making?

How long does it take?

- xxx

Materials and Tools

- Appropriate experience capture templates

ACTIVITIES

Design:

- During and after option experiences, across portfolio and over time
  - Pay attention to the cognitive, emotional and sensory aspects of the experience.
  - Observe what is happening - phenomena, patterns and relationships
  - Active Listening and questions to seek clarity and understanding
  - Capture individual observations

Relationship:

- Share personal experience
  - Collectively reflect on the significance
  - and meaning of the experience
  - Collectively capture and document relevant observations, reflections and insights

Project Mgmt:

- Run Sense-making workshops to extract insight and intelligence from portfolio.
  - Inhabit desired disposition and mindset to enhance individual perceptiveness in the experience
  - Confirm and assume roles and responsibilities for the interactions you are about to engage in
  - Review and ensure access to the learning objectives
  - Agree on capture/note-taking process (individual and/or collective)
- Prepare Option project updates/reports

Finance:

- Prepare financial project updates/reports

Capabilities & Mindsets to Bring

- Designerly
- Notice, Sense, Observe
- Reflective Practice
- Pattern finding, Identifying significance, shedding information
- Judgement
- Change perspectives – balcony and dance floor
- Open, receptive, inquisitiveness

Inputs in needs

- When and how to invest in capability build
- Problem owners
- Partners
- DD team

Outputs it produces

- Team preparedness and receptiveness for experience
- Participation in the Option experience with the learning objectives in mind.
- Experience, and a record of that experience.

What to look out for?

- Dynamically manage the progression of Option activities to maximise experience.
- Design each Option activity to maximise potential learning value.
- Deliberately engage in each Option activity to gain experience and learning.

AXILO

Deep Demonstrations Design Process: Intelligence

INTELLIGENCE

GENERATE INTELLIGENCE → COMMUNICATE INTELLIGENCE
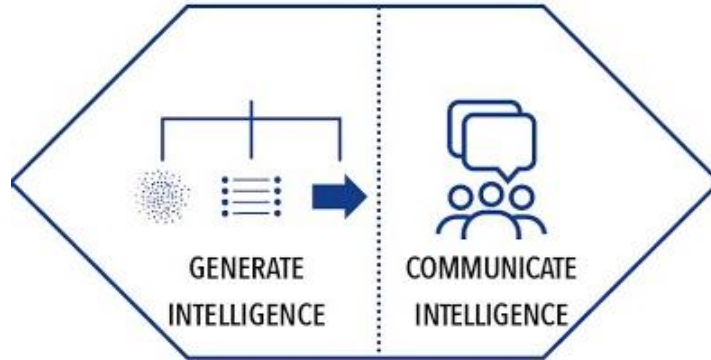
DESCRIPTION (What is it? Why do it?)

- **Intelligence** is the ultimate objective of the Deep Demonstrations process. By intelligence we mean input prepared for decision makers to enable action. Intelligence is the outcome of sense-making and analytics drawing on innovation experience and learning from multiple different experiments deploying diverse leverage points.

OBJECTIVES

- xxx

OUTCOMES PRODUCED

- xxx

SO WHAT: Generate Intelligence

Objectives & Outcomes:

- Make sense of active Option experiences
- Generate and deliver timely relevant strategic

intelligence.

- Collective reflection on the experience and learning being delivered by the whole Portfolio of Strategic Options.
- Transform observations and insights gained from experience into strategic intelligence reports.

Who does it?

- Representatives from each Option look for patterns, significance and meaning across their experience.

How is it done?

- Collaborative workshop

When does it happen?

- Dynamic process
- Workshops vary over time

How long does it take?

- xxx

Materials and Tools

- xxx

ACTIVITIES

Design:

- Generate an intelligence space that seeks to derive higher orders of meaning from the new understanding gained from experience.
- Make and shape a new understanding that transforms our perspective.
- Create maps of the unknown territory by understanding systemic
- relationships, meaning structures, causes and effects and underlying assumptions.
- Create models and frameworks to formulate a new understanding of what's going on.

Methods & Tools:

- Capture observations – take good, thorough notes
- Some ideas to prompt questions and guide your observations…
- Drama & narrative – map the experience as a drama (set, players, scenes, costumes)
- AEIOU – Activities, environments, interactions, objects, users
- POEMS – People, objects, environments, systems
- Senge's Pyramid (drivers – structures – events)
- Audio & video record (with permission)
- Take photos (with permission)
- TFD – what am I Thinking, Feeling, Doing?

Relationship:

- Widen sense-making engagement and open to a broader stakeholder and decision makers
- Build relationships with Policy makers, Boards of directors and Key decision makers (public)

Project Mgmt:

- xxx

Finance:

- xxx

Capabilities & Mindsets to Bring

- Sense of interdependency.
- Turning information for yourself and others.
- Helping others to reflect and learn.
- Self-awareness
- Curiosity, Wonder, Awe
- Deep, rigorous and systematic questioning
- Stamina, Synthetic Thinking

Inputs in needs

- Typology of arguments;
    - Financial,
    - Strategic,
    - Community,
    - Policy
- All relevant capture/outputs from Option experience
- Option project engagement plan
- Learning Objectives

Outputs it produces

- Strategic Intelligence
- Distilled insights and strategic intelligence for reporting and strategic conversations and other learning conversations

What to look out for?

- xxx

AXILO

SO WHAT: Articulate and present arguments

Objectives & Outcomes:

- Generate arguments and decision-enabling experience i.e. make change actually happen.
- Articulate Implications:
    - Utility of the strategic option to service the position statement.
    - Productivity of the option in servicing the position and context of the portfolio.
    - Nature and dynamics of the structural change
    - Nature, utility and desirability of future competencies and business models to mitigate strategic risk.

Who does it?

- xxx

How is it done?

- xxx

When does it happen?

- xxx

How long does it take?

- xxx

Materials and Tools

- xxx

ACTIVITIES

Design:

- In the communication space, seek to articulate and produce insight and intelligence that meets the needs of leaders and decision-makers in the organisation.
- Convert our new understanding into clear insight and intelligence.
- Shape it into a communicable form so that we can share our strategic
- intelligence and inform the leaders' conversation about resilience and renewal.

Review Building Blocks:

- Core Assertion (CA)
- Overarching judgement
- Statements of Evidence (SE)
- Facts that support the core assertion
- Secondary Judgements (SJ)
- Additional insights on the core assertion
- Contextual Data (CD)
- Facts adding context, texture, and richness
- Pertinent Implications (PI)
- What next, tailored for individual consumers

Elicit building blocks

- Surface assumptions
- Identify key features: Commonalities, Adjacencies, Complementarities,
- Polarities
- Apply key questions: How are these features related? Where will
- resulting developments lead? What will matter?

Relationship:

- xxx

Project Mgmt:

- Relevant strategic insight and intelligence capture

Finance:

- xxx

Capabilities & Mindsets to Bring

- Distil information
- Primus inter pares leadership style
- Judgement

Inputs in needs

- Relevant outputs of sensemaking phases

Outputs it produces

- Relevant strategic insight and intelligence
- What does effectuation look like:
    - Procurement rules
    - Taxes
    - Subsidies
    - Regulations
    - Green bonds
    - Capital injections
    - Guarantees
    - Loans
    - Industry investment
    - Community buy-it:
    - Endorsement
    - Advocacy

What to look out for?

- The core assertion has absolute control over the remaining content in the intelligence report. The remaining building blocks prove, support or explain the core assertion.
- Blend statements of evidence, secondary judgements, and contextual data. These elements are sorted in decreasing order of importance or from highest to lowest level of generality or detail.
- Evidence usually precedes secondary judgements.

AXILO