**Workshop Outline**

<table>
<thead>
<tr>
<th>Welcome and introduction (15 mins)</th>
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<tbody>
<tr>
<td>Define test criteria OR Introduce a previously-determined list of criteria (15 mins – 1 hour)</td>
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<tr>
<td>Group assess priority list (based on their personal or professional priorities) (15 mins)</td>
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<tr>
<td>Discussion on biggest differences to come up with a joint list (30 mins)</td>
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<tr>
<td>Tips and alternatives for Facilitator –</td>
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<tr>
<td>No plenary introduction but discussions in subgroups (12 people maximum). This will only work if the groups have a facilitator who knows the scenarios and understands the criteria.</td>
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<tr>
<td>A short concentration and creativity exercise (could be based on a scenario-characteristic consumer, representative of the organisation, an employer) as an introduction to a scenario-specific priority list (participants vote from the perspective of that characteristic person).</td>
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<tr>
<td>(Option) Clarify special options or strategic choices (in subgroup):</td>
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<tr>
<td>Short plenary introduction on strategic choices</td>
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<tr>
<td>Clarifying, specifying strategic choices. All choices in ‘or… or’ form. Give a clear definition of the choice. Be as concrete and specific as possible.</td>
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<tr>
<th>Test new or existing options (1½ hours)</th>
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<tbody>
<tr>
<td>Introduce and prioritise options to be tested (30 mins)</td>
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<td>e.g. “In 2020 the management team (sector, government) looks back at the decisions made in 2007. How will we evaluate this strategy in 2020 from the perspective of the Global Market?”</td>
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<td>Guiding questions can help. For example:</td>
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<td>Did the expected positive effects come through?</td>
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<tr>
<td>Do we see unexpected negative side effects?</td>
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<tr>
<td>What would we do differently from the perspective of this scenario? Would we reject this policy totally? Or would we suggest some adjustment, and if so what would the adjustment be?</td>
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<tr>
<td>Test options (30 mins)</td>
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In plenary or in subgroups (each subgroup working with separate options) using the Option Matrix.

The results: a flip chart with a completed Option Matrix and at least 3 to 5 bullets explaining the score.

**Tips and alternatives for Facilitator –**

- Test one option in the plenary if the process is new for the group or if you want to create a common understanding of the process or the interpretation of the scale used in the matrix. This plenary testing will take 15 to 30 minutes.

**Generic guiding questions:**

- Is the strategy or goal still valid according to different stakeholders in this world?
- Is the defined result realistic, feasible?
- Do we have to execute all planned activities (or are there activities that did not contribute to the goal or where other parties executed alternative actions)?

*(Option)* Repeat the testing process (30 mins)

**Wrap-Up: Conclusions and recommendations (30 mins – 1 hour)**

- Short plenary, wrap up on main new insights and main weak points, flaws.
- Are there aspects of the scenario our new portfolio cannot deal with? If so organise a brainstorm to make plans for this situation, but only start executing if this scenario becomes a reality (e.g. Shell and the oil crisis).
- Brainstorm to identify potential Early Warning events that might indicate this unwished for future development is going to happen.

**Close**

**Aims**

To produce some robust options, ideally within three or even four scenarios. The testing process is an iterative process, use it to fine-tune (“wind-tunnel”) the options and ideas. Ideally use the process to get a better understanding of the way in which the ideas can be further developed or implemented.

**Outputs**

1. For all options, a flip chart with the Option Matrix using the following scale:
   - -- this will have major negative consequences in this scenario;
   - - this will have negative consequences in this scenario;
   - 0 this will have no consequences (positive and negative effects will balance);
   - + this will have positive consequences in this scenario;
   - ++ this will have major positive consequences in this scenario.

2. Summary debate of the score for each scenario - 3-5 bullets on:
   - Why?
- Where? (Customer group, work process, specific institution, specific course, etc).
- How? (Qualitative indication of impact).

3. An improved definition of the best options.
4. Recommendations (optional) with regard to potential activities to be prepared for a scenario with a weak portfolio. Activities we make plans for, but only start executing if this scenario becomes a reality (e.g. Shell and the 1973 oil crisis).
5. Early Warning System to identify weak signals for one or more scenarios.

Design Considerations

- Use formal and SMART (Specific, Measurable, Achievable, Realistic and Targeted) testing criteria? Should they be generic or specific? A formal set of testing criteria will improve the results. A formal and diverse set leads to sharper arguments and better insights on how to improve the selected options. Although specific criteria derived from, for example, a corporate strategy can help, using a generic set of criteria can also be useful.
- Develop test criteria: with customer, with group or as part of the preparation of a workgroup? We prefer to start with a shortlist of ideas and then give the group the opportunity to elaborate on and specify the list and at the end compose a shortlist.
- Wide or focused groups? Starting with a big group will provide the opportunity to carry out a large quantity of testing in relatively little (throughput) time. A second step with a more focussed group is needed to finish the process in a suitable way.

Pre-requisites

- Participants know and understand the specific scenarios and adopt them as a valuable starting point for policy development and testing.
- Participants have strong analytical competences and the competence and patience to argue within the boundaries of a specific scenario.
- List of Options generated from previous workshop if available.

Preparation

**Facilitator:**
- Check the news to identify 2 or 3 issues for each scenario that indicate this scenario is already here (the week before the workshop).
- Allocate participants to scenarios.
- Adjust, improve and send the option set.
- Identify suitable and SMART selection criteria.

**Participants**
- Read the option set before the event.

Facilitator requirements

- Mood board (e.g. A1 picture collage, A3 PowerPoint prints).
- Flip chart for each scenario/group.
- Previously-generated Options list.
- Separate break-out rooms (depending on workshop group structure).

**Tips**

1. Sometimes (especially with very heterogeneous groups) it is necessary to identify risk strategies before you can start a proper testing process. Some approaches that have been used *with risks* are:
   - A portfolio covering all scenarios. *Conservative and safe.*
   - A separate strategy for each scenario. *Time-consuming to make and very expensive to implement.*
   - A flexible strategy postponing as much choice as possible. *Only implement quick and easy wins.*
   - Focus on one likely or preferable scenario. *Narrowly-focused and risky.*

2. Use the Boston Matrix instead of a 5-point scale to test options (see toolkit for further details). Invite participants to allocate the options in one of the quadrants.

3. Use existing generic or specific test criteria to speed up and improve the test process. Possible criteria are Sustainability (People, planet, profit) or Demand (potential customers, purchase frequency, service delivery) and teaching process (content, quality, and cost).

4. Form a core team to follow up the results of the test process. Making a sharp and consistent analysis is a heavy and sometimes time-consuming process. Use the workshop with a bigger group only to collect arguments then form a small core team (4 to 6 people) to finish the test report, to specify and integrate arguments. It is sometimes good to involve external expertise to get a sharp and objective test report.

5. Extra checks to improve the results. In the test procedure different groups work in parallel on a few options for 4 scenarios. To make sure that a ‘++’ has more-or-less the same meaning and weight for different options, mixed groups are formed to check the results. The starting point for this is to create an integrated matrix with options for each scenario and invite all participants to give their top ten (10 points for the most valuable one). After completing this start a dialogue on the options with big variances in their scores. Make sure that valid arguments are written down and reported. This check can be part of the workshop or of the smaller core team activity.

6. Use consumer-testing principles to sharpen results. Sometimes a more dedicated way of testing results is needed. When using multiple criteria principles of consumer tests could be used, for example with a matrix similar to that below:

<table>
<thead>
<tr>
<th>Cost</th>
<th>Quality</th>
<th>Work pressure</th>
<th>Added value</th>
<th>etc</th>
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www.jiscinfonet.ac.uk/tools/scenario-planning/test-options-workshop.doc
<table>
<thead>
<tr>
<th>Option 1</th>
<th>++</th>
<th>-</th>
<th>--</th>
<th>+</th>
<th>++</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option 2</td>
<td>+</td>
<td>0</td>
<td>0</td>
<td>+</td>
<td>-</td>
</tr>
</tbody>
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